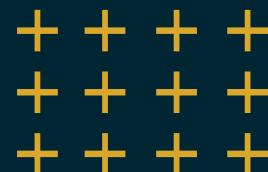


# Dallas Baptist University

CARNEGIE



## **Thank you for the opportunity to submit a proposal for digital marketing support!**

Our proposal outlines a comprehensive strategy designed to leverage the power of digital marketing channels to increase visibility, engage your target audience, and ultimately drive inquiries. And we believe that we're uniquely positioned to partner with you. Working with us, you'll:

- 1. Have a partner that knows Higher Education.** Since 1985, we've been at the forefront of higher education marketing. Our team has been in your seat, many of us holding leadership positions in the space, so we understand the nuances of the industry including terminology, recruitment cycles, Gen Z and Gen Alpha expectations, and more. We will bring that expertise to every conversation to advise on the best path forward.
- 2. Unlock the Power of Data.** Digital marketing for higher education requires constant innovation. With new technologies and updating algorithms, the landscape is always changing. But no one understands the higher education landscape and the future of digital marketing as well as Carnegie. We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.

- 3. Embrace a philosophy and approach that is markedly different and fundamentally better than the prevailing standard.** We have always led with innovation. We introduced digital marketing to higher education when the industry relied on name purchases and mailers, we developed a proprietary psychographic approach to audience targeting to challenge the industry's reliance on demographics, and we have been on the cutting edge of technology integration in a world where our tools and systems are more critical than ever. Our team will bring that same vigor to our partnership.

As you review our proposal, please contact me if you have any questions or would like additional information. Hopefully, this proposal will serve as a springboard for additional conversation and collaboration – we'd love to tailor our approach to your needs.

### **Now, let's go!**

#### **Allegra Schreder**

Client Success Director

443.975.2246 | [aschreder@carnegiehighered.com](mailto:aschreder@carnegiehighered.com)

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# Comprehensive Services

We can meet you wherever you are in your journey. Consider our team an extension of your own — focused on your needs, dedicated to your success.



## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.



## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.



## ENROLLMENT STRATEGY

Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.



## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.



## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.



## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.



## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.



## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.



## SIGNATURE CREATIVE

By defining what sets you apart and by learning what will speak to your audiences, we create impactful messaging that builds reputation and forges powerful connections.



## SLATE OPTIMIZATION

Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.



## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.



## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.

# Digital Expertise and Market Saturation

We are equipped with dedicated teams to leverage cross-channel tactics to meet your goals.

| DISPLAY                   | PAID SEARCH                             | SOCIAL MEDIA         | STREAMING          | SEARCH ENGINE OPTIMIZATION      |
|---------------------------|---|----------------------|--------------------|---------------------------------|
| Display Outreach          | Pay Per Click (PPC)                     | Meta                 | Pandora            | Content Optimization            |
| Retargeting               | Remarketing Lists for Search Ads (RLSA) | LinkedIn             | Spotify            | Technical Site Audit            |
| IP Targeting              | YouTube                                 | Snapchat             | YouTube            | Technical Consulting            |
| Mobile Location Targeting | Demand Gen                              | TikTok               | Hulu               | Metadata Optimization           |
| Mobile Footprints         | <b>MEASUREMENT</b>                      |                      | Reddit             | Google Business Profile         |
| Audience Select           | Carnegie Clarity™                       | X (formerly Twitter) | OTT + Connected TV | Writing Workshops               |
| Geofencing                | Live Dashboard Reporting                | Quora                | Podcasts           | Website Redesign Consulting     |
|                           | Advanced Analytics                      | Outbrain             |                    | ADA Compliance Consulting       |
|                           |   |                      |                    | YouTube Optimization            |
|                           |   |                      |                    | Program Name Analysis           |
|                           |   |                      |                    | Blog Consulting                 |
|                           |   |                      |                    | Organic Social Media Consulting |

# Pioneers of Digital Strategy

*Carnegie was one of the first to bring digital marketing to higher education*

- + **Subject Matter Experts:** Many of our team members came from leadership roles within higher education across all divisions.
- + **In-House:** All execution is done by our team of 100 digital strategists giving us the flexibility to pivot throughout the year.
- + **Unified Marketing & Enrollment Strategy:** Our work is development to support your overall marketing and enrollment strategy. We see these efforts as once piece of the overall puzzle.
- + **Insider Understanding:** Our access to teams within Google, Meta, and many other channels give us access to beta products, advanced targeting, specialized reports and more.
- + **Custom Solutions:** Everything we've designed for you today is custom to your goals, audiences, and trajectory of your institution.

# Google Premier Partner

Each year Google recognizes the achievements of top-performing digital marketing partners across the globe by awarding Premier Partner status.

**Only 3% of Google Partners achieve this honor.** Our Google partnership has direct benefits for you in the form of expertly trained staff, dedicated Google account and technical support, and early access to exciting beta products.



## WHAT THIS MEANS FOR YOU

- + Dedicated Google account and technical support
- + Early access to exciting beta products
- + Competitive spending analysis reports
- + Quarterly education trends reports
- + And more!

# Our Proposed Approach

## DIGITAL MARKETING STRATEGY AND EXECUTION



With this strategy, we kept costs aligned to roughly \$100,000 annually. Our recommended mix includes both awareness driving tactics and lead generation to reach prospects at each stage of their journey with the appropriate messaging and CTA. We would develop creative to allow for specific targeting and alignment of messaging. We will work with you to help identify DMAs based on past enrollment data and strategic expansion goals. Our initial recommendation includes:

- + Leveraging LinkedIn Sponsored Content for lead generation both online and in person PRST to Dallas and retargeting nationwide
- + Utilizing IP Targeting to a list of 18,000 prospective students
- + Incorporating the always-on tactic of Display Retargeting to drive application behavior for those who have visited key web pages on your site.
- + Harnessing Google PPC to stay in front of active searchers based on a comprehensive keyword strategy including program, geography, and brand related keywords.
- + Creation of a landing page for PPC efforts and digital assets for respective social and display campaigns utilizing existing brand guidelines.

**40%**

### Display

IP Targeting  
Display Retargeting

**25%**

### Social

LinkedIn Sponsored Content

**25%**

### PPC

PPC - Google Ads

**5%**

### Creative

Display Ads  
Social Ads  
Landing Page Creation & Hosting

**5%**

### Analytics & Attribution

Slate & Ping Reporting

Note: Fees are a percentage of spend

## WHAT TO EXPECT

### **Our Process**

We'll start our partnership by meeting with key stakeholders, gathering any relevant research conducted, and analyzing previous campaigns and your strategic plans moving forward. A thorough understanding of your big-picture needs and how they align with current enrollment goals is necessary to create the most effective marketing plan. We'll confirm goals, audiences, and priorities for this fiscal year and walk through our processes and systems for information access and sharing. From there, we will construct and set up campaigns, working hand-in-hand with your team to confirm assets, creative, and plans are managed effectively. Your day-to-day point of contact will be an Account Manager—all day-to-day communications funnel through this contact to provide you with a clear and consistent channel to your Carnegie team. We utilize the project management software Asana for high-level phased planning and the minute management of tasks and subtasks.

### **Implementation**

We'll assemble a team of strategists, campaign managers, creatives, researchers, and a dedicated account manager to support all University projects. Your digital strategy director will work with you to define scope and objectives, playing an advisory role and serving as your strategic expert. Your digital strategy director reports directly to Carnegie's Digital Strategy AVP, who brings a decade of expertise in strategic campaign development for higher education to Carnegie's team. Tactical duties for the campaign will be primarily managed by digital strategists and specialists who will set up, monitor, and continually optimize and restructure campaigns as needed to maintain performance.

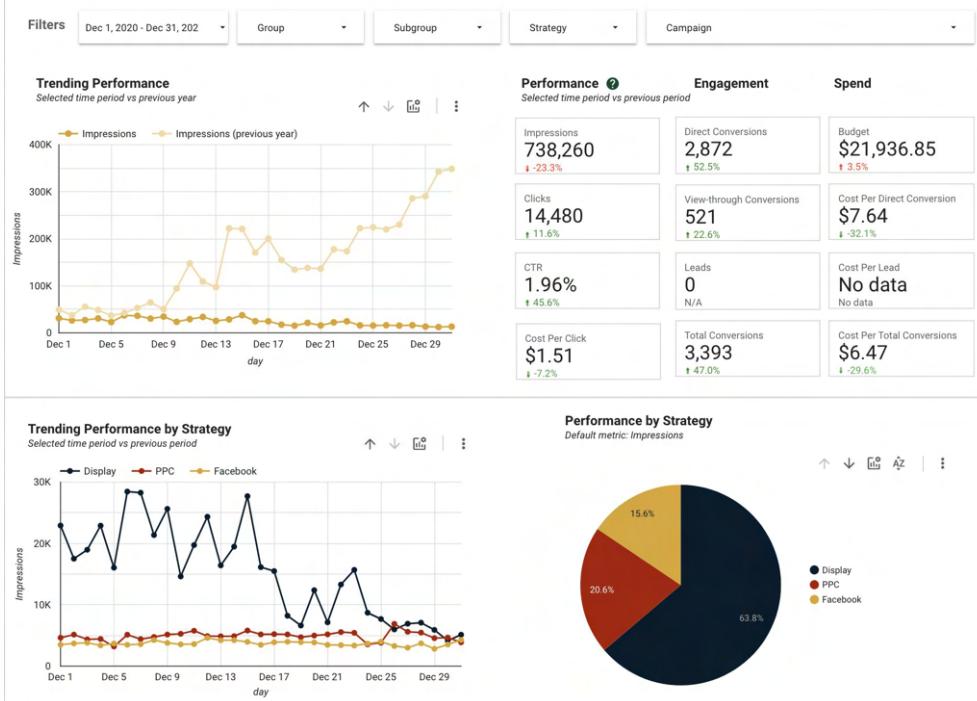
### **Measuring Results**

Starting from project kickoff and throughout our partnership, our team will work with you to translate campaign objectives into the right metrics and goals. These will become the focal point for campaign performance measurement, reporting, and analysis. KPIs are constantly monitored to prove strategy and tactic effectiveness and make campaign optimizations. Carnegie will work with you to deploy the right tracking technologies to collect data tied to the defined KPIs. This ranges from the placement of ad platform tracking pixels to helping configure web analytics tracking. The data collected is then used in our live reporting dashboards built on leading data visualization platforms. These dashboards are available 24/7 and updated daily, making campaign results and ROI fully accessible at any time. In addition to the live dashboards, our strategists will provide analysis, insights, and next steps based on campaign performance.

## CAMPAIGN RESULTS DASHBOARD

Ensuring you have immediate and ongoing visibility into your campaign performance is a priority for Carnegie. We'll provide a live dashboard so you can monitor, track, and review essential KPIs and performance metrics at any moment throughout your campaign. This allows for continuous evaluation of our strategies and gives us the ability to provide consistent and ongoing optimizations and enhance campaign results.

In addition to your live dashboard, we'll provide regular in-depth analyses into the performance of your campaigns, with our team of experts delivering key insights, trends, recommendations, and pacing for your specific goals. We're committed to your success, and we prioritize your performance above all else.



## CREATIVE

### Landing pages

Driving traffic from your ads to campaign-specific landing pages maximizes both your digital ad spend and your ability to convert and generate leads. From strategy and design to hosting and A/B testing, our in-house Creative team will leverage industry best practices and work with your institution to produce landing pages that serve all your campaign needs and generate inquiries. We can also integrate with your CRM for the ultimate efficiency in real-time lead delivery.

### Display and Social Ad production

The very first touch point of any digital campaign is the ad a prospective student or parent sees. Our Design team can produce compelling ads to ensure your message is delivered clearly and resonates with your audience. Leveraging your branding guidelines and industry best practices for optimal results, we can quickly and cost-effectively develop the creative you need to improve the engagement of your Display ads or social media campaigns.

### Animated Ad production

Utilizing animation in your digital campaigns is a great way to quickly grab the attention of your target audience and convey your brand message in a way that's both effective and visually appealing. Our Design team can produce highly engaging HTML5 Display banner ads or short form animated ads for platforms such as Snapchat, allowing you to deliver more information to your prospective student or parent audience in a dynamic, compelling way.

## CREATIVE

### Display and Social Ad production

The very first touch point of any digital campaign is the ad a prospective student or parent sees. Our Design team can produce compelling ads to ensure your message is delivered clearly and resonates with your audience. Leveraging your branding guidelines and industry best practices for optimal results, we can quickly and cost-effectively develop the creative you need to improve the engagement of your Display ads or social media campaigns.



NORWICH UNIVERSITY  
Online

APPLY AND BEGIN  
BUILDING DISTINCTION  
WITHIN YOUR CAREER  
WITH NORWICH ONLINE

The appearance of U.S. Department of Defense (DoD) visual information does not imply or constitute DoD endorsement.



NORWICH UNIVERSITY  
Online

PREPARING  
STUDENTS TO GO  
BEYOND FOR  
200+ YEARS

The appearance of U.S. Department of Defense (DoD) visual information does not imply or constitute DoD endorsement.

## CREATIVE

### Landing pages

Driving traffic from your ads to campaign-specific landing pages maximizes both your digital ad spend and your ability to convert and generate leads. From strategy and design to hosting and A/B testing, our in-house Creative team will leverage industry best practices and work with your institution to produce landing pages that serve all your campaign needs and generate inquiries. We can also integrate with your CRM for the ultimate efficiency in real-time lead delivery.

4 Columbia Business School

# One Extraordinary Executive MBA.

## Two options

Are you ready to expand your world exponentially?

Our Executive MBA-New York provides two empowering options

The business landscape has changed. And tomorrow it will change again. Choose from two options that fit your schedule to put you and your organization at the forefront of change.

**EMBA-New York: Friday/Saturday**

- Five terms over 20 months
- Core classes held every other Friday and Saturday
- Requires company time sponsorship

**EMBA-New York: Saturday**

- Six terms over 24 months
- Classes meet on Saturdays
- Does not require company time sponsorship

Provide your current contact information and program interest to receive relevant updates from Columbia Business School.

First Name

Last Name

Email Address

Date of Birth

When are you interested in attending degree?

Entry Term

Country  United States

City  City

State  State

Submit

20- or 24-month program (depending on the option)

Friday and Saturday or Saturday only

In-person program in NYC

50,000+ global alumni

The largest elective offering of any EMBA program

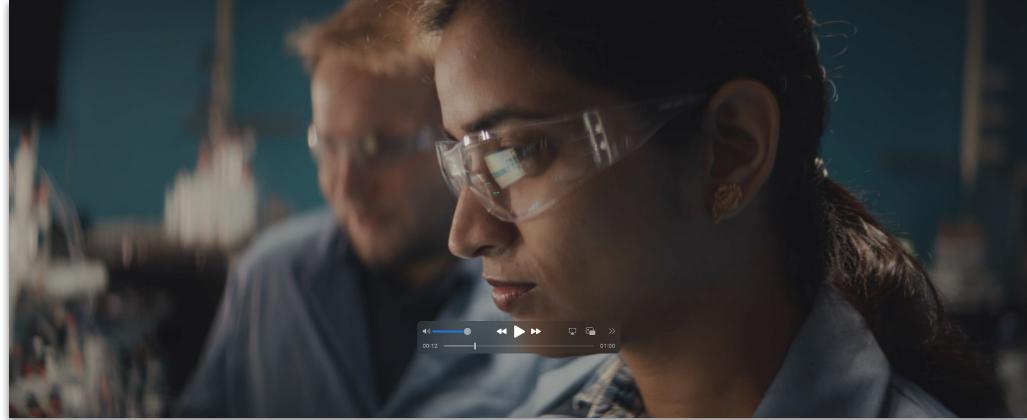
**Snapshot: Curriculum**

Digital Future: Digital electives have increased five times over the past seven years. Course examples include Analytics in Action, Python for MBAs, and People Analytics.

Entrepreneurship and Innovation: Led by the Eugene Lang Entrepreneurial Center, notable courses, incubators, and early-stage financial support help students turn ideas into action.

# Digital Video Campaign

Elevate your digital marketing with compelling video assets that represent your brand across platforms. Guided by our Video Planning Guide and collaborative process, from initial concept brainstorming to the final execution, we work closely with your team to ensure that every aspect of the video campaign reflects your brand, delivers on your goals, and speaks powerfully to your audience. Our team will run discoveries, conceptualize the video, write scripts, and present a vision for the campaign. Once approved, we will guide your team through on-the-ground video shoot preparations, including subject selection, location scouting, scheduling principles, subject dress and appearance, props, and talent recruitment. On-site, the Carnegie production team will execute the video shoot in partnership with the university producer. Our team will then complete all post-production editing, including music selection and voice-over. The end result will be custom, right-sized content ready to move the needle.



## The Grainger College of Engineering

The brand anthem video we produced for Grainger won a 2023 Platinum Viddie and two 2023 Gold Telly Awards. Watch it now at <https://vimeo.com/74277934/c2609aa2eb>.

# Recommended Annual Investment

| Service                                | Scope of Work Summary  | Annual Cost      |
|--|--|------------------|
| DIGITAL MARKETING STRATEGY + EXECUTION | Strategy, execution, and management of all paid digital media. Set up across all digital platforms including keyword research, creation of target audiences, development of all copy and ad text, including testing variations, bidding strategies, etc. Access to a live dashboard to monitor digital campaigns as well as ongoing analysis from Digital team, including performance insights, trends, and recommendations when applicable.   | \$100,000        |
| DIGITAL VIDEO CAMPAIGN                 | One 30-second campaign video<br>Two 10-15-second social media versions of the campaign video, including 3 refreshes per video<br>Two 10-15-second campaign story social media videos, including 3 refreshes per video<br>Hard drive delivery of unedited footage at the completion of the engagement<br>Three rounds of revision are included for all deliverables.<br>On-the-ground production includes up to six Carnegie crew members for 3 days.<br>Travel expenses are not included and will be billed separately. The included voiceover is licensed regionally for one year of broadcasting rights, and web and social media use rights in perpetuity. National licensing and other licensing arrangements are available upon request for a fee. Yearly license renewal and management are available upon request for a fee. The included music is licensed for \$25,000 or less ad spend and is licensed for web use only (social media and websites). Expanded licensing arrangements are available upon request for a fee. | \$115,000        |
| <b>Total:</b>                          |  | <b>\$215,000</b> |

# Success Stories

# The University of Idaho

18

**“Partnering with Carnegie has been the best way to maximize our internal resources and equip us for growth. I attribute much of our success to Carnegie’s model—we have real time feedback, direct access to the team’s expertise, spot on recommendations, and ongoing adjustments. The team is always one step ahead of us, which is crucial in a marketing environment that demands agility and flexibility.”**

**John Barnhart**  
Chief Marketing Officer



## + The Situation

The University of Idaho needed an integrated digital marketing partner to achieve its enrollment growth goals. To support and enhance in-house capabilities, the University invested in additional marketing resources and chose Carnegie through a competitive RFP process. Having partnered previously with a local marketing agency, the University turned to Carnegie with a need for strategic higher education expertise. A state-funded institution, the University needed to maximize its resources and generate a proven ROI.

## + The Strategy

19

We strategized and implemented a full-funnel digital campaign that included Display Outreach and Retargeting, paid search, behavioral and list targeting, and social and streaming media to reach and engage prospective students at each phase of the enrollment journey. Campaigns targeted a variety of audiences, including prospective undergraduate, graduate, and transfer students as well as alumni. We also optimized landing pages and enhanced analytics to maximize advertising spend as well as the University's ability to generate leads and track user traffic and behavior. We regularly met with University marketing leadership to review results and adjust tactics, messaging, and campaign strategy to drive the results the University needed.

## + The Results

In the first two years of our partnership, the University of Idaho enrolled two of its largest freshman classes in five years—an increase of 36% from fall 2020 to fall 2022. The University also saw an increase in graduate and overall enrollment. University marketing leadership recognized the power of Carnegie's partnership in driving this enrollment growth and continues to work closely with us as a trusted marketing partner.

**36%**

first-year enrollment  
increase during the  
first two years of our  
partnership

---

# CARNEGIE

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978.692.5092

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[info@carnegiehighered.com](mailto:info@carnegiehighered.com)



Integrated Engagement Proposal

# Drexel University

CARNEGIE



Dawn Medley  
Vice President of Enrollment Management  
Drexel University

Dear Dawn:

## Thank you for the opportunity to submit a proposal for modeling and recruitment services!

The project-at-hand has far-reaching potential for your institution. It's an opportunity to fundamentally change the way that you approach optimizing your systems for modeling and recruitment efforts. And we believe that we're uniquely positioned to partner with you.

**A True Ecosystem Approach to Enrollment.** We don't ascribe to the more is more, philosophy. We don't promise increased enrollment by sending to the masses through one primary channel. Instead, we collect and interpret intelligent, market-driven, student-centric data and then leverage findings to comprehensively curate your enrollment plan, including distinct and targeted content that is customized for each university.

**Delivering Confidence.** The more you know, the better you'll target, the smarter you'll work, the more confidence you'll have. This is what market intelligence is all about—empowering you to make important strategic decisions. Market intelligence comes from accessing the right data, asking the right questions of the right audiences, and producing an actionable and digestible analysis. We're here to help with your custom query or to optimize the tools and data you already possess. We're all about the answers without the fuss, and we only provide actionable and understandable results.

**Embrace a philosophy and approach that is markedly different and fundamentally better than the prevailing standard.** The power of human connection fuels our work. We leverage a basic human need to help you form strong bonds with your audiences that lead to action.

As you review our proposal, please feel free to contact us if you have any questions or would like additional information. Hopefully, this proposal will serve as a springboard for additional conversation and collaboration – we'd love to tailor our approach to your needs.

**Now, let's go!**

**Jaime Oleksik**  
VP, Business Development  
443.929.6241  
[joleksik@carnegiehighered.com](mailto:joleksik@carnegiehighered.com)

# | Your Goals & Opportunities

# Goals and Opportunities

Drexel's goals inspire us to engage in a deep process of discovery, deliver proven processes, and unify our teams toward specific outcomes.

From your conversation, we understand that your particular goals include:

- + **Assess current instance of Slate** to identify what is working and what isn't.
- + **Build advanced scoring data in Slate** to improve how nimble the recruitment team can be throughout the cycle.
- + **Leverage data** to develop a more sophisticated and targeted marketing approach.



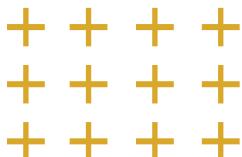
# Our Commitment to Drexel University

We will develop a distinctive and strategic brand platform to elevate your national profile, promote brand awareness, and increase your enrollment pipeline.

**We will work with you to develop a data-informed, Slate driven enrollment strategy.**

Our inclusive process offers a comprehensive consultation, an emphasis on market research, and a commitment to developing a data-informed recruitment strategy.

- + **Work to elevate your Slate instance** to ensure you are using Slate effectively across the full lifecycle of your many student audiences.
- + **Develop easy to use scoring metrics** in Slate for your recruitment team to prioritize their efforts.
- + **Leverage data-driven research** that provides clear direction on market position strategies.



# Our Proposed Approach

## SLATE ASSESSMENT CONSULTATIONS

Ensure the success of your next Slate project with help from our experts! We provide hands-on, project-specific consultations, so you're learning while your work is progressing. Our team will support yours through offline support and remote consultation calls, where you'll workshop new and exciting ways to use Slate features and tackle day-to-day operational troubleshooting.

Each month of the consultation is designed to focus on a selected topic, whether recommended or requested, in which one project call will be used for a discovery call with the following calls that month to be used to collaboratively troubleshoot based on Carnegie recommendations. Consultation hours cannot be rolled over to the next week or month; if the total allotment of hours is not fulfilled, remaining hours expire at the week or month's end.

### BENEFITS OF SLATE ASSESSMENT CONSULTATIONS:

- Custom support based on areas of need
- Outside Slate expertise to address existing issues
- Flexible format to address areas of need in a timely fashion



## LEAD SCORING

This is **data-driven intelligence that maximizes your resources and results.**

Carnegie's Lead Scoring assigns a probability of application to each student in your prospect pool. Together, and with this information, we will make impactful strategic and budget saving decisions to maximize your efforts. Lead scores can inform communication segmentation, recruitment plans, direct mail volumes, digital spends and early yield interventions that will impact your enrollment goals. Lead scoring helps you deploy your valuable resource where they will have the greatest impact.

### **BENEFITS OF LEAD SCORING:**

- Run digital inquiry, prospect, admit, deposit, visit, yield, parent campaigns and more—you choose
- Use this rich data to make resource allocation decisions that allow you to change up your recruitment and marketing mix
- Inform communication segmentation, recruitment and marketing plans, and intervention tactics
- Lean on our team of consultants deliver the data as well as the action plan
- Benefits from multiple purchases throughout the cycle

## STRATEGIC NAME BUY

We will deliver a name purchasing model based on your enrollment data and market intelligence analysis to ensure that **your selections are precise and have the highest likelihood of conversion**. Our **philosophy is to identify and cultivate students** who are best-fit for your institution, **moving away from the traditional high-volume, lower-conversion Student Search of the past and toward a more student-centric, market-mindful model which emphasizes yield and optimizes your Student Search budget**.

### BENEFITS OF STRATEGIC NAME BUY:

- Built on historic enrollment data, market research, and a channel analysis your model will reflect an ecosystem approach to recruitment
  - Student Search criteria and recommendation will consider demographic, academic, socioeconomic, and source variables
  - Our recommendation will be data-driven and consider national trends, recruitment opportunities, and comprehensive sourcing options
- Managed by our team your purchased names are fully integrated in your Slate instance—from mapping to reports
- Agile and modern, our purchasing strategy includes multiple executions and ongoing monitoring for optimization

\*we offer name buy consultation packages for first-year underclassmen, undergraduate transfer, and graduate.

## RECOMMENDED INVESTMENT

|  |  |                            |
|--|--|----------------------------|
| <b>Slate Assessment Consultations</b>              | Each month of the consultation is designed to focus on a selected topic, whether recommended or requested, in which one project call will be used for a discovery call with the following calls that month to be used to collaboratively troubleshoot based on Carnegie recommendations. <ul style="list-style-type: none"><li>● Maximum of eight hours of Slate consultation including:</li><li>● Remote troubleshooting support</li><li>● Weekly 50-minute project calls</li></ul> | <b>\$32,000 (12 month)</b> |
| <b>Lead Scoring</b>                                | Using predictive analytics and leaning on our extensive recruitment experience, we build custom models to transform raw admission and recruitment data into actionable insights. We score each prospective student, helping you focus limited resources and evaluate the return on your student search investments.  | <b>\$10,000</b>            |
| <b>Name Buy Consultation + Enrollment Strategy</b> | Delivering a name-buy recommendation and diversified sourcing strategy based on your enrollment data, market research, and channel analysis to ensure that your selections are precise and have the highest likelihood of conversion.  | <b>\$24,500</b>            |
| <b>Total:</b>                                      |  | <b>\$66,500</b>            |

## SLATE COMMUNICATIONS



Deliver a consistent student experience with "All-in" Student Search communications. **All class levels. All stages of the Journey. All optimization moments. All channels. All of it.** Let us do the heavy lifting.

### POST-SEARCH

- Application Generation
- Incomplete Application Awaiting Submission (5 Emails)
- Incomplete Application Awaiting Materials (5 Emails)
- Yield
- Anti-Melt

Total: \$85,000

### FULL FUNNEL

- Underclassmen Search
- Senior Search
- Application Generation
- Incomplete Application Awaiting Submission (5 Emails)
- Incomplete Application Awaiting Materials (5 Emails)
- Yield
- Anti-Melt

Total: \$135,000

### PREMIUM

- Underclassmen Search
- Senior Search
- Application Generation
- Incomplete Application Awaiting Submission (5 Emails)
- Incomplete Application Awaiting Materials (5 Emails)
- Yield
- Anti-Melt
- Two population- or stakeholder-specific campaigns

Total: \$155,000

### PREMIUM PLUS

- Underclassmen Search
- Senior Search
- Application Generation
- Incomplete Application Awaiting Submission (5 Emails)
- Incomplete Application Awaiting Materials (5 Emails)
- Yield
- Anti-Melt
- Four population- or stakeholder-specific campaigns

Total: \$175,000

# SLATE REPORTS

## Singular Report

*Designed to serve one population (e.g., First Year, Transfer, Graduate, etc.)*

- One report (maximum of 4 report parts)

## PROJECT SUPPORT

- 4-week project duration
- Up to two 50-minute project calls

**\$5,000**

## Basic Reporting Package

*Designed to serve one population (e.g., First Year, Transfer, Graduate, etc.)*

- Up to three reports (maximum of 12 report parts)

## PROJECT SUPPORT

- 10-week project duration
- Up to four 50-minute project calls

**\$15,000**

## Premium Reporting Package

*Designed to serve one population (e.g., First Year, Transfer, Graduate, etc.)*

- Two additional (five total) reports (maximum of 20 report parts)

## PROJECT SUPPORT

- 18-week project duration
- Up to six 50-minute project calls

**\$20,000**

## Premium Plus Reporting Package

*Designed to serve one population (e.g., First Year, Transfer, Graduate, etc.)*

- Two additional (seven total) reports (maximum of 28 report parts)

## PROJECT SUPPORT

- 30-week project duration
- Up to ten 50-minute project calls

**\$25,000**

**Additional populations (e.g., International, Adult) can be added for a cost of \$7,500 per population.**

**Report part is defined as a segment of a report that returns aggregate data (e.g. by major, by geography, by high school, event type, communications campaign, origin source, etc.). Report parts have up to ten columns and ten rows for readability and report performance.**

---

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[info@carnegiehighered.com](mailto:info@carnegiehighered.com)

# Utah State University

PROPOSAL

## Integrated Student Search Solution



CARNEGIE

Katie Jo North  
**AVP New Student Enrollment**  
Utah State University  
Old Main Hill  
Logan, UT

Dear Katie Jo and members of the review committee:

## The landscape of higher education marketing is shifting like never before.

More competition. Fewer students. More demands. Fewer resources. More channels. More data. More analytics. You've heard the trends, best practices, mantras, and key takeaways. But you also live in the real world—a world in which your team has all the energy, optimism, and ideals but not enough hours in the day. How do you cut through the clutter, the busywork, and make real gains that will move the needle?

**Have a partner who knows you well.** Having literally traveled the world with Ian in a previously life and connecting with so many campus partners over the past few years/months, I am confident in our ability to serve as a trusted partner and really understand you as individuals and the institution. We're armed with insights about Utah State and we are ready to see ourselves as an extension of your team.

**Tap into an unmatched depth and breadth of relevant experience.** Tap into an unmatched depth and breadth of relevant experience. Complementing the talents of your team, we'll apply our best collective thinking to your goals and opportunities.

**Embrace a philosophy and approach that is markedly different and fundamentally better than the prevailing standard.** The power of human connection fuels our work. We leverage human psychology to help you form strong bonds with your audiences that lead to action, affinity and enrollment.

As you review our proposal, please feel free to contact us if you have any questions or would like additional information. Hopefully, this proposal will serve as a springboard for additional conversation and collaboration—we'd love to finalize this strategy together.

### Now, let's go!

**Adam Parker**  
Director, Client Success  
712.210.6301  
[aparker@carnegiehighered.com](mailto:aparker@carnegiehighered.com)

# Proposal Contents

Our mission is to help our clients understand who they are, who their audiences are, and how to forge powerful and enduring relationships. We offer a comprehensive and integrated portfolio of services that generate results for whatever challenges you may face. We invented our proprietary methods and tools because nothing like them existed in the marketplace to provide solutions.

Our talented force of strategic thinkers are passionate about your triumphs. We stack your deck by employing industry leaders and insiders who not only love to succeed but also love to help you change the game. This is how we earn your trust as an invaluable strategic partner.



|                                     |    |
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# Your Goals & Opportunities

Utah State University is seeking a strategic partner to provide a modern Student Search and engagement solution that combines traditional Search strategies with Digital marketing and social media.

# Your goals are our goals

Your goals reflect your desire for new, differentiated, and more effective strategies.

## We understand that you need to:

- + **Grow new student enrollments** over the next few years through a stronger inquiry pool.
- + Focus on **increasing overall enrollment** for your incoming class.
- + Integrate and leverage **data within your Slate** instance.
- + Maintain and enhance **the geographic, socioeconomic, and programmatic diversity** of your inquiry and applicant pools.
- + **Reach prospective students earlier** in the college selection process.

# Together we will collaborate

Together we will build a modern Student Search solution that focuses on fit, diversifies sources, differentiates by using psychometric data, deploys a 360 digital strategy, optimizes your email marketing, and focuses on increased conversions and ultimately, yield.

## We will create a solution designed to:

- + **Increase both awareness and affinity** for Utah State University in existing and new markets.
- + **Increase engagement** at important conversions.
- + **Optimize enrollment** by balancing both headcount and net tuition revenue.
- + **Infuse data into your Student Search efforts** for better strategic decision making, in flight and year over year.
- + **Dynamically engage** with students at various entry points throughout your ecosystem.

# Our Proposed Approach

# Landscape changes demand a new approach

- **The demographic cliff:** fewer students to recruit
- **The decrease in access to prospect data:** fewer test takers, data privacy policy, and the end of race-conscious admission
- **The rise of GenZ:** students demand authenticity, customization and to be met where they are
- **The digital revolution:** 24/7 access to information has changed how people think and act
- **Buyer Controlled Market:** all these changes have given students all the leverage

**1 million**

The cumulative drop in  
Fewer test takers in  
2023 compared to 2019

**22%**

The drop in students  
enrolling in college directly  
from high school in 2022

**55%**

The average tuition  
discount rate for  
first-year, full-time  
students in 2021-22

**30%**

The percentage of  
college freshmen who  
drop out

**6**

The typical number of  
colleges and universities  
that seniors apply to

**\$58T**

The amount of money  
transitioning from  
Boomers to Xer's and  
Millennials this decade

**25%**

Gen-Z students who  
discover one or more  
schools through social  
media

**35%**

College-aged students  
who report that they  
tend to distrust  
education institutions

**92%**

Students who indicated  
that being authentic and  
true to oneself is  
extremely or very  
important

# Yield-focused Approach to Student Search

Our Student Search is counter to the traditional high-volume, low-conversion Student Search of the past. Your enrollment solution will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals. With yield as our ultimate measure of success, **we focus on increasing engagement and conversions at each stage in the enrollment journey**, from prospect to deposited student.

**A collaborative partnership focused on yield.**

## ***Tip the scale***

**Recruit with purpose** by using market research to inform prospect acquisition and predictive modeling to identify those with greater propensity to take action.

## ***Use personality to personalize***

**Capture attention and build connection** with your prospects through psychometric segmentation and research-backed creative.

## ***Campaigns should be agile***

**Drive engagement** with precision digital advertising and dynamic email communications, that are monitored for performance and optimized to meet your enrollment goals.

## ***Data should be owned and available***

**Gain a competitive edge** with real-time reporting and automatic ownership of every record sourced.

## ***Resources should be used efficiently***

**Leverage predictive and actionable data sets** to spend your time and money where it matters most.

## ***Your Student Search should be custom crafted***

**Pair your institutional knowledge with our best-in-class services** for the exact solution you need today, and know that we are already building the solution of tomorrow.

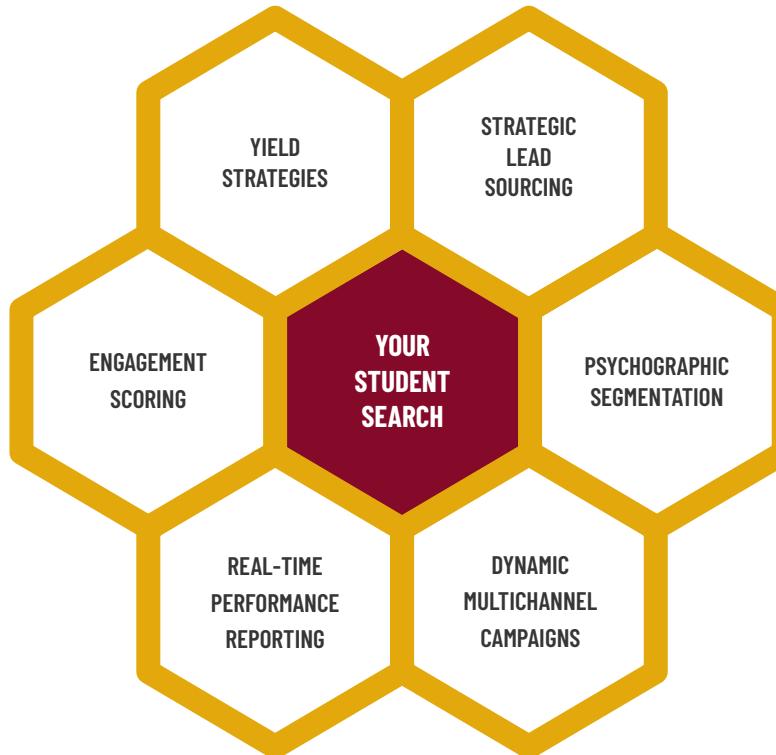
## ***It's more than "Search"***

Enrollment management today is so much more than search response and application generation. This Student Search is the marriage of smart enrollment and marketing strategies. We include yield drivers like financial aid strategy and yield campaigns. We support the full enrollment journey, to support your enrollment aspirations, by increasing engagement and conversions, and ultimately yielding your class.

# Tailored, Not Templatized

We offer full enrollment life-cycle solution purpose-built for today's higher education landscape.

**Your solution will be customized to answer your most pressing marketing and enrollment needs.**



# Enrollment Strategy Consulting

Student Search needs a constant hand on the wheel—we provide that steady hand to ensure your success. We will begin by building a Student Search Strategy based on our wealth of experience, best practices and aligned with your goals.

Your Enrollment Strategist will work with our subject matter experts and specialists to ensure a seamless integrated execution of your strategy. They will know your campaigns, review performance data and make sure to bring optimizations and insights to your discussions.

You will benefit from our channel specialists and also have a main point of contact for strategic pivots, questions from the board, and performance reviews.

## BENEFITS OF CARNEGIE STUDENT SEARCH:

- ⊕ Partner with our tenured enrollment leaders on developing your modernized Student Search
- ⊕ Rely on their strategic oversight of your work
- ⊕ Know you have a single person to call to talk strategy, performance, and what's next!

# Strategic Lead Sourcing

We will deliver a name-buy recommendation and diversified sourcing strategy based on your enrollment data, market research, and channel analysis to ensure that your selections are precise and have the highest likelihood of conversion. And then we'll focus your time and energy by identifying those students most likely to engage with your institution.



NAME BUY  
CONSULTATION

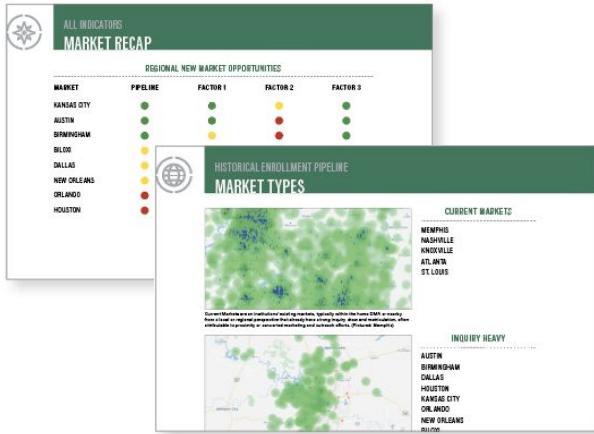
LEAD SOURCING  
STRATEGY

LEAD SCORING

STUDENT DATABASE  
ACCESS

MARKET  
OPPORTUNITY  
INDEX

# Name Buy Consultation



We will deliver a **name-buy recommendation** and **diversified sourcing strategy** based on your **enrollment data, market research, and channel analysis** to ensure that your selections are precise and have the highest likelihood of conversion.

We use market viability analyses to align your institution's goals and your purchasing strategy. Using existing enrollment data and demographic evaluations of prospective markets, we will identify opportunities in **new markets and uncover hidden potential in your backyard**.

## BENEFITS OF CARNEGIE STUDENT SEARCH:

- + Built on historic enrollment data, market research, and a channel analysis your model will reflect an ecosystem approach to recruitment
  - Student Search criteria and recommendation will consider demographic, academic, socioeconomic, and source variables
  - Our recommendation will be data-driven and consider national trends, recruitment opportunities, and comprehensive sourcing options
- + Leverage market research in strategic name purchases to identify new markets and backyard opportunities
- + Agile and modern, our purchasing strategy includes multiple executions and ongoing monitoring for optimization

\*we offer name buy consultation packages for first-year underclassmen, undergraduate transfer, and graduate.

# Lead Scoring

This is **data-driven intelligence that maximizes your resources and results.**

Carnegie's Lead Scoring assigns a probability of application to each student in your prospect pool. Together, and with this information, we will make impactful strategic and budget saving decisions to maximize your efforts. Lead scores can inform communication segmentation, recruitment plans, direct mail volumes, digital spends and early yield interventions that will impact your enrollment goals. Lead scoring helps you deploy your valuable resource where they will have the greatest impact.

## BENEFITS OF CARNEGIE STUDENT SEARCH:

- + Run digital inquiry, prospect, admit, deposit, visit, yield, parent campaigns and more—you choose.
- + Use this rich data to make resource allocation decisions that allow you to change up your recruitment and marketing mix.
- + Inform communication segmentation, recruitment and marketing plans, and intervention tactics.
- + Lean on our team of consultants deliver the data as well as the action plan.
- + Benefits from multiple purchases throughout the cycle

# Student Database Access

**You need student names.** We offer a **reliable** student name source to augment your list strategy for Student Search. Our solution is CollegeXpress—The most **comprehensive, multichannel, recruitment tool** available to colleges and universities.

## BENEFITS OF CARNEGIE STUDENT SEARCH:

- + Deploy an always-on strategy, for year-round inquiry delivery.
- + Build a strong multi-cycle pipeline from freshman to seniors.
- + Shape a diversified student pool—CollegeXpress is free and accessible to all students.
- + Attract hand-raisers with targeted email marketing and on-platform digital advertising
  - o Segmentation from gender and geography to academic interest and aptitude
- + Direct upload to your CRM instance, including data mapping, origin source set-up, and future performance reporting.



# Psychographic Segmentation

Deliver the personalized experience students are asking for and stand apart from your competition. By combining student demographic and psychographic data—like personalities, motivations, and beliefs—we deliver custom audience segmentation and student profiles that ensure your Student Search campaigns capture attention and create affinity.

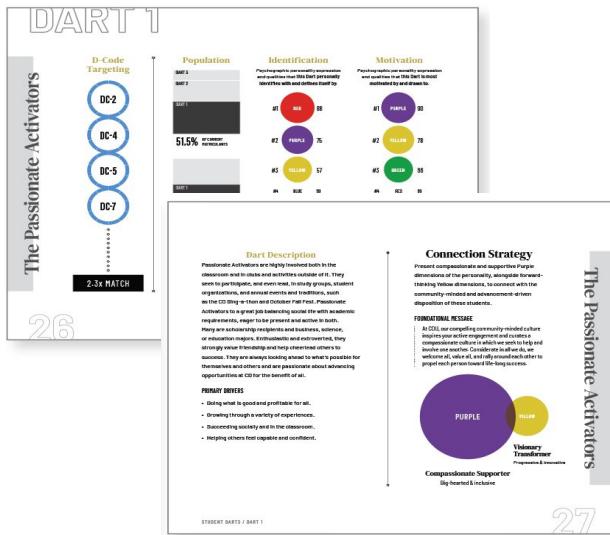


INSTITUTIONAL  
PERSONAS

NATIONAL  
PERSONAS

PERSONALIZED  
CREATIVE

# Custom Psychographic Segmentation – Carnegie Darts



You are well aware of the high expectations of the students you recruit—Darts are the ultimate way to meet and exceed those expectations. By sampling your current student's demographic data and psychographic data—like personalities, motivations, and beliefs—we deliver **CUSTOM student personas** (Darts) for use in **advanced audience segmentation** and **personalized communications**. This model of psychometric segmentation is based on your student population—individuals who have already successfully enrolled—making it the most predictive dataset with which to build your student personas.

## BENEFITS OF CARNEGIE STUDENT SEARCH:

- + Deliver truly personalized communications with custom psychometric segmentation—only found at Carnegie.
- + Tag your prospect database with custom student personas for segmentation and best-fit communications.
- + Lean on our creative team to write and design communications personalized by your Darts and with information like what that student will find most attractive about your institution.
- + Email, digital ads, print, and landing pages.
- + Integrated into your CRM, Darts offers sophisticated reporting and communication segmentation.

# Dynamic Multi-channel Campaigns

We'll deliver the right message to your Student Search audience at precisely the right time. You'll be supported by a team with unparalleled experience, who will work directly in your campaigns to optimize performance. Your Student Search campaigns will be agile, optimized, and fully-supported.



SENIOR  
SEARCH

UNDERCLASSMEN  
SEARCH

SEARCH  
LANDING  
PAGE

# Slate Communications



Technolutions' first Slate Platinum  
Preferred Partner

## Carnegie Hosted-Slate Instance

Your Student Search email campaigns will be agile, optimized, and fully-supported. Our team of Slate communications experts will monitor your campaign performance and ensure your campaigns are optimized to deliver engagement and conversions to achieve enrollment success.

### BENEFITS OF CARNEGIE STUDENT SEARCH:

- + Campaigns built in your Carnegie-Hosted Slate Instance—by the best Slate team in the industry.
- + Custom Slate set-up for Utah State, hosted by Carnegie for your Student Search.
- + Fully supported service including:
  - o List management and segmentation
  - o Attribution and tracking and email marketing
  - o Real-time reporting with 24/7 access via your Carnegie Reporting Center (see performance reporting slide)
  - o Print Management
  - o Guidance on the data transfer to your CRM
- + We help configure or advise on data exports/imports to ensure accurate data mapping.
- + Count on us for ongoing monitoring and consulting on your Student Search strategy
  - o On-going support provided via regular calls addressing campaign performance and optimization recommendations

# Real-time Performance Reporting

Carnegie wants to empower you to take control of your Student Search, by providing the data that you crave, real-time reporting, and expert analysis to make it all actionable. Whether data and reporting is in your Slate instance or a Carnegie-hosted Slate instance, we provide full funnel data for YOY reporting, as well as real-time campaign performance. Our team of marketing and communications experts work directly in your campaigns tracking performance and delivering insights to optimize your efforts.



PERFORMANCE  
REPORTING

24/7 REPORTING  
ACCESS

IN-FLIGHT  
OPTIMIZATIONS

ACTIONABLE  
INSIGHTS

ATTRIBUTION  
TRACKING

# Website Attribution + Personalization



We can give you full student journey data, from the very first touchpoint to application and beyond. From digital campaigns to Student Search emails, through to deposit submission, we track and report on each user's unique digital journey.

We use this powerful intel to create a personalized website experience for each site visitor—based on their behaviors, interests, and position in the pipeline. We will help you create and deliver custom web content for an onsite experience that will meet student expectations and drive action.

The tool is called Carnegie Clarity, named for the data transparency it provides. With Carnegie Clarity you have the power to engage stealth prospects, deliver meaningful messages at milestone moments, and truly understand your Student Search ROI.

## BENEFITS OF CARNEGIE STUDENT SEARCH:

- + See full lifecycle tracking and attribution in your Slate instance for ROI reporting
- + Collect rich behavioral data to optimize the student experience
- + Lean on our team for personalized on-site creative and delivery
- + Track all digital campaigns in your Slate instance

# Investment and Timeline

# Investment Summary

## Core Student Search Investment

### CollegeXpress Lead Generation

Connecting with prospective students at every stage of their journey is more challenging than ever before. CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

### Name Buy Consultation

Delivering a name-buy recommendation and diversified sourcing strategy based on your enrollment data, market research, and channel analysis to ensure that your selections are precise and have the highest likelihood of conversion.

### Prospect to Inquiry Slate Communications

Tailoring your Senior and Underclassmen Slate communications based on custom data points and generate connections with highly relevant messages. Campaigns are built in your Carnegie-Hosted Slate Instance with no data transfers involved and real-time campaign reporting is built in.

\$214,580

### Psychographic Segmentation - Carnegie Darts

Groundbreaking research into the psychographic variables of your undergraduate student segments, and detailed audience persona profiles (called a "Dart") that describe specifically who you should target, where they tend to exist in the nation, and how best to reach them.

### Lead Scoring

Custom modeling predicting inquiry-to-applicant conversion to inform your team's outreach priorities. Inclusive of regular tagging of current inquiries to signal likelihood to convert, delivered weekly until census.

## Slate Instance

### Carnegie-Hosted Slate Instance

Full configuration and maintenance of a dedicated Slate instance for your Search efforts, including email authentication configuration for sender and domain reputation, configuration and automation of data exports and imports, import of up to 3 years of historical data for reporting

\$20,000

## Carnegie Clarity

### Website Attribution & Personalization

Strategy, execution, and management of all paid digital media. Set up across all digital platforms including keyword research, creation of target audiences, development of all copy and ad text, including testing variations and bidding strategies. Access to a live dashboard to monitor campaigns as well as ongoing analysis from our team, including performance, trends, and recommendations when applicable.

\$59,131

# Multi-year Discounts

We want to be your partner in helping you meet your enrollment goals, for us this means being invested and working together with you. We know we have great success when we have more time to work alongside you to refine things, as such, we have created these multi-year options for you. We have included the cost of our search solution, Carnegie-hosted Slate instance, estimated print and postage costs, and proposed digital advertising costs. Your Student Search solution is scalable based on further conversation and we look forward to building this solution together.

| Multi-year Partnership                               | Core Student Search Investment | Carnegie-Hosted Slate Instance | Carnegie Clarity     | Total                 |
|--|--------------------------------|--------------------------------|----------------------|-----------------------|
| Total Annual Investment<br><b>1 Year Partnership</b> | <b>\$214,580</b>               | <b>\$20,000</b>                | <b>\$59,131</b>      | <b>\$293,711</b>      |
| Total Annual Investment<br><b>2 Year Partnership</b> | <b>\$183,534/year</b>          | <b>\$20,000/year</b>           | <b>\$59,131/year</b> | <b>\$262,485/year</b> |
| Total Annual Investment<br><b>3 Year Partnership</b> | <b>\$171,568/year</b>          | <b>\$20,000/year</b>           | <b>\$59,131/year</b> | <b>\$250,699/year</b> |

# Our Proposed Process



## DISCOVER

In discovery, we'll review project goals, timelines, and dive into your brand voice, data set-up, and more.

### **Key activities will include:**

- + Kick Off and Discovery meetings
- + Asset exchange (data)
- + Motivator set-up
- + Digital audience specifications
- + Market confirmations
- + Timeline creation



## STRATEGIZE

We'll derive insight from the Discovery process and create a custom, tailored Student Search Strategy for you.

### **Key deliverables will include:**

- + Name Purchasing Model + Lead Scoring Analysis
- + Market Opportunity Report
- + Persona Segmentation
- + Communication Plans



## ACTIVATE

We'll produce persona driven creative assets and then deploy them throughout your enrollment ecosystem.

### **Those assets will include:**

- + Dynamic Slate emails + campaigns + segmentation
- + Personalized print pieces



## MEASURE

After deployment we'll provide you with regular reports and recommendations for campaigns in flight.

### **Reports will include:**

- + Custom dashboards
- + Engagement benchmarking
- + Conversions reports
- + Recommendations and pivots
- + Ongoing optimizations



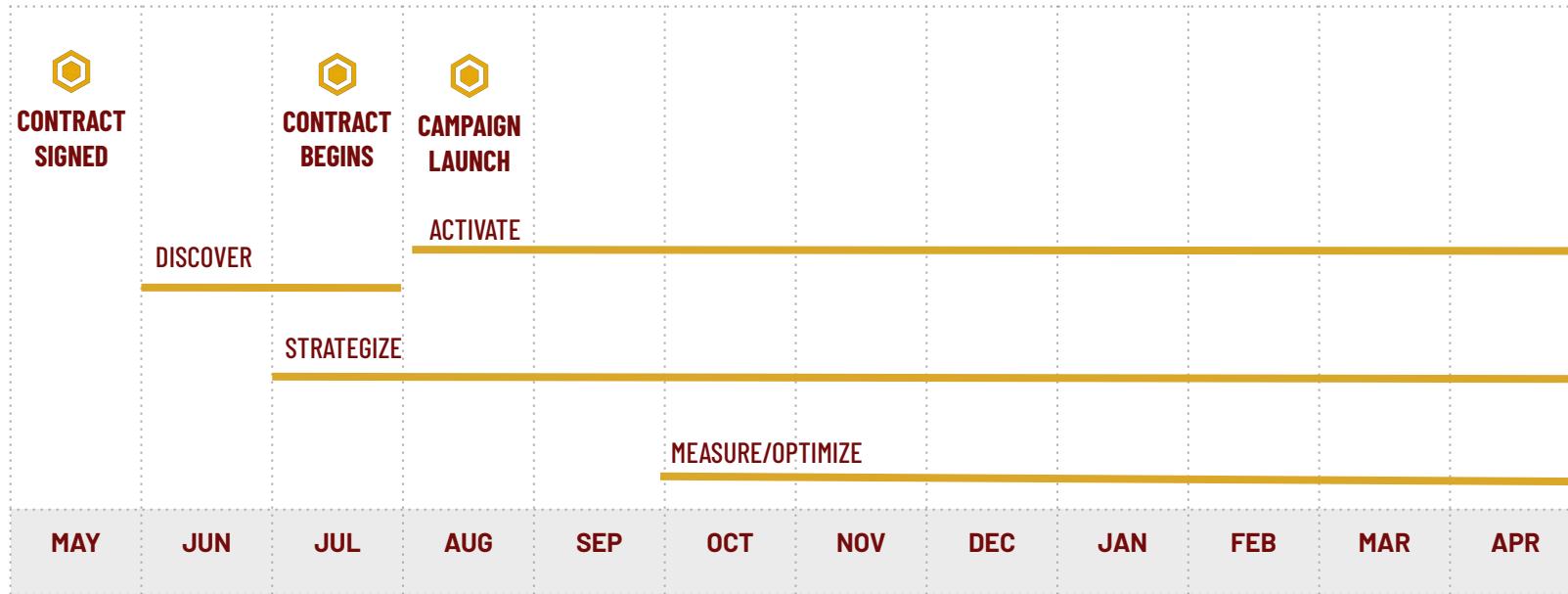
## OPTIMIZE

Iterative improvement is essential to maximizing your efforts over time. We will provide ongoing consultation.

### **Support will include:**

- + Email campaign implementation
- + Name Buy strategy
- + Market Opportunity
- + Segmentation

# Carnegie Student Search Timeline



# Your Leadership Team

# One Team. Your Team.

**Human Connection is what gets us up in the morning.**

We believe that genuine connection is the key to capturing attention and building affinity between students and institutions, but it's also core to who we are as a company. We build connections, relationships, and dare we say it: friendships. It's our people that set us apart.

We've assembled a team from multiple disciplines to work with you to ensure a seamless experience throughout each phase of work.

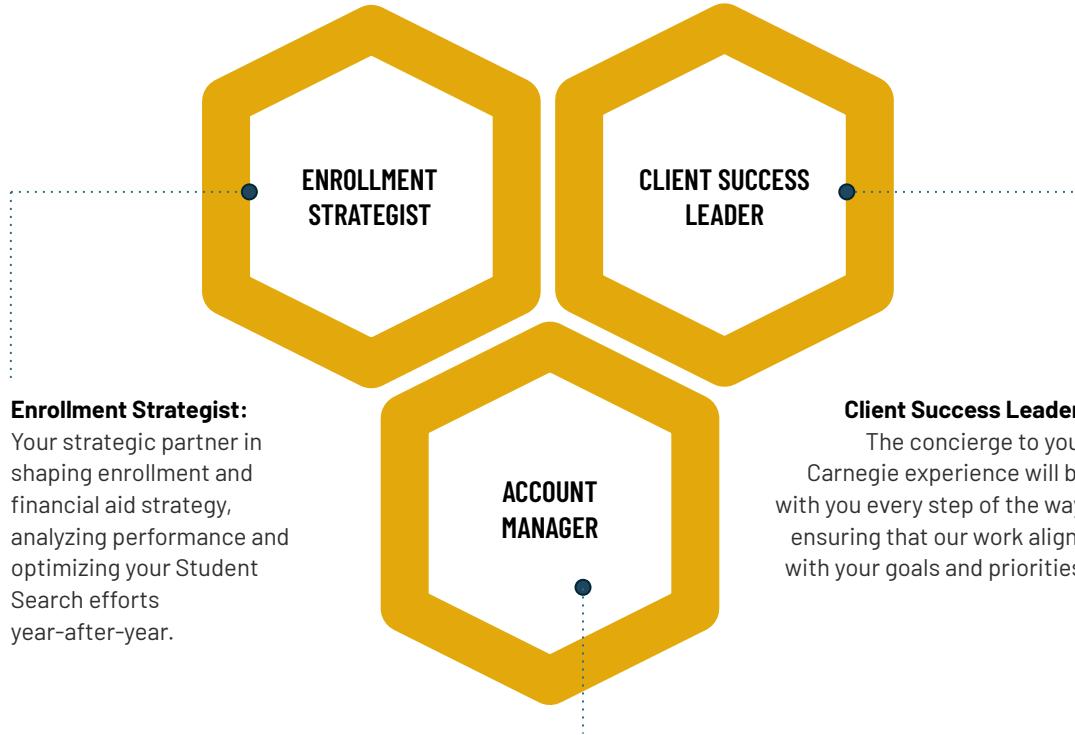
From the Client Success Manager providing strategic direction to the Account Manager keeping day-to-day tasks on track, and all the subject matter experts in-between, we are one team—your team.

# Essential Relationships

Your core team at Carnegie will include the Enrollment Strategist, Client Success Leader, and Account Manager.

## Deep bench of expertise

You'll also have a team of experts working on your campaigns and directly accessible to you throughout our partnership. Seasoned Digital and CRM strategists, world-class graphic designers and writers, Web experts, and Financial Aid analysts all will be on your team to ensure success.



# Carnege's Persona Archetypes Key

|  |  |  |  |  |
|--|--|--|--|--|
| <p><b>Innovator</b></p> <p><b>Brilliant and forward-thinking</b><br/>Driven by inventing the future through innovation. Delivers advancement, ingenuity, and radical outcomes. Values newness, experimentation, and progress. Causes people to feel awe and amazement.</p>  | <p><b>Explorer</b></p> <p><b>Adventurous and inquisitive</b><br/>Driven by the quest for discovering the unknown. Delivers progress and an unmatched interest for uncovering truth. Values investigation, curiosity, and trailblazing. Causes people to feel intrigued and emboldened.</p>  | <p><b>Creator</b></p> <p><b>Creative and imaginative</b><br/>Driven by self-expression and artistry. Delivers something new that encourages creativity. Values originality, ideation, and new concepts. Causes people to feel constructive and expressive.</p>      | <p><b>Competitor</b></p> <p><b>Resilient and tenacious</b><br/>Driven by overcoming challenges through grit and determination. Delivers surprising strength, perseverance, and toughness. Values fortitude and hard work. Causes people to feel triumphant and inspired.</p>  | <p><b>Rebel</b></p> <p><b>Daring and rebellious</b><br/>Driven by challenging and redefining the norm. Delivers empowerment, change, and boldness. Values independence, guts, and breaking with convention. Causes people to feel unrestrained and fearless.</p>  |
| <p><b>Provider</b></p> <p><b>Supportive and selfless</b><br/>Driven by compassion, warmth, and the desire to care for others. Delivers nurturing, comfort, and protection. Values altruism, commitment, and generosity. Causes people to feel valued and supported.</p>     | <p><b>Entertainer</b></p> <p><b>Energetic and enthusiastic</b><br/>Driven to entertain and cause others to get excited. Delivers fun and the desire to amuse and uplift. Values energy, playfulness, and enjoyment. Causes people to feel exhilarated and happy.</p>                        | <p><b>Sophisticate</b></p> <p><b>Sophisticated and refined</b><br/>Driven by experience, elegance, and beauty in all forms. Delivers excellence, finesse, and vitality. Values poise, intentionality, and beauty. Causes people to feel desired and important.</p>  | <p><b>Achiever</b></p> <p><b>Powerful and assertive</b><br/>Driven by growth and being a frontrunner. Delivers stability, pride, and strength. Values power, influence, and accomplishment. Causes people to feel confident and in control.</p>                               | <p><b>Beige</b></p> <p><b>Generic and confused</b><br/>Beige, though not considered an archetype in our model, is still an important consideration. Beige indicates either a completely neutral personality expression or one that attempts to do everything at once.</p>  |

# Success Stories

# Asbury University

**“Student Search through Carnegie has given us a tool to meet students where they are in the ways they want to be communicated with. We’re able to connect with students who understand our message and who yield at a much higher return.”**

**Jennifer McChord**

Vice President Of Enrollment And Marketing  
Asbury University

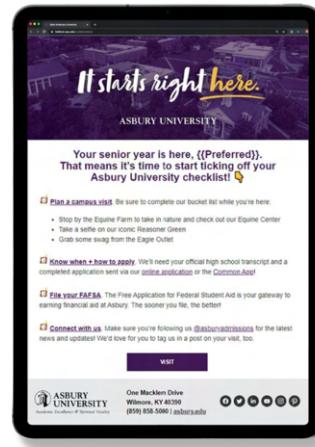
Asbury University, a private Christian institution, needed an integrated enrollment marketing partner to support its goals for growth and market differentiation. Previous Student Search strategies had failed to demonstrate the yield results and return on investment the University needed.

# The Strategy

Carnegie's partnership started with consensus-building brand strategy to build an understanding of the University's core differentiators and how to express them. Carnegie has since partnered with Asbury for a variety of integrated solutions, including Audience Segmentation (Darts), Creative and Multimedia development, Digital Marketing, and more. Carnegie integrated Asbury's personality and Darts into Slate and executed an in-house segmented Student Search across sophomore, junior, and senior audiences. The Slate Optimization partnership also included communication planning, name buy consultation, report building, and campaign monitoring. The financial aid optimization team designed an individualized approach to financial aid allocation that aimed to substantially reduce the level of tuition discounting, provided ongoing projections and enrollment analytics, and made mid-cycle adjustments to the aid strategy to ensure Asbury met their headcount, net tuition revenue, and student profile goals.

# The Results

Asbury has experienced several indications of the positive impact of a Carnegie partnership. Enrollment leadership noted improved melt and yield rates, increased use and utility of their CRM investment, and consistency in brand expression across campus. Carnegie-generated Student Search inquiries yielded at a rate of 33.5% (versus 30.4% the previous year). Asbury also saw an increase in first year deposits by 20%, resulting in an overall 25% increase in net tuition revenue. The individually optimized financial aid strategy allowed Asbury to achieve an aggressive NTR goal, reducing the tuition discount rate by 1% in the process. The Class of 2027 also boasts the highest average high school GPA in recent years and shows a 5% increase in representation from students residing in border states. As Asbury seeks to continue to build classes of best-fit prospective students and achieve its goals for awareness and enrollment growth regionally and beyond, Carnegie is proud to serve as the University's partner.



# Gettysburg College

**“Student Search through Carnegie gives us consistency of message, creativity, flexibility, and knowledge of best practices and insights about what’s working and what’s not. We love that everything is in Slate, and while we have plans outlined, we can also pivot and adapt when needed.”**

**Gail Sweezey**

Dean of Admissions,  
Gettysburg College

When Gettysburg College needed a marketing and enrollment strategy partner to mobilize its strategic plan for enrollment success, they looked to Carnegie.

## ⊕ The Strategy

Gettysburg, a long-time partner of Carnegie, knew that to be competitive in their marketplace, they needed to better understand their market and how best to communicate the value of a Gettysburg education. Gettysburg's enrollment and marketing leadership came to Carnegie with a new strategic plan and some new ideas about how they might connect with prospective students—but they wanted to test their plan in the market.

Together, Carnegie and Gettysburg rolled out a custom research project comparing Gettysburg's standing amongst its competitors. This project provided invaluable insights into the themes and messages that would not only attract students but also distinguish Gettysburg from the competition. With these findings, Gettysburg launched a new messaging campaign in December of 2022.

To broaden its reach and make a lasting impression, Gettysburg expanded its paid digital strategy to include a blend of SEO, PPC, IP Targeting, and social media platforms, including Facebook, Instagram, Snapchat, YouTube, and OTT into its marketing mix. The implementation of GA4 and Carnegie Clarity played a critical role in this phase, ensuring optimal investment returns through precise measurement, attribution, and enhanced on-site personalization. This holistic digital strategy paid off, with a remarkable 86% increase in new site visitors, 69% of which were directly attributed to Carnegie-Gettysburg campaigns.

A key component of Gettysburg and Carnegie's multi-layered marketing + enrollment strategy was the focus on inquiry acquisition through CollegeXpress, Carnegie's student database and lead generation platform. This initiative proved successful, with 15% of Gettysburg's admitted students and 9% of those who deposited being sourced through CollegeXpress.

**4%**

increase in YOY inquiries

**23%**

increase in submitted applications YOY

**3%**

increase in admits YOY

Further integrating their strategy, Carnegie leveraged Gettysburg's Slate instance to launch Sophomore, Junior, and Senior Student Search communications. Carnegie's Slate team designed Slate communications campaigns in the client's instance, giving Gettysburg real-time insights into campaign performance and rich behavioral data about their potential incoming class.

This integrated marketing and enrollment effort helped Gettysburg achieve its 2023 enrollment goals.

## + The Results

Carnegie's partnership helped Gettysburg reach and engage its prospective student audience, as demonstrated by digital, communications, and inquiry-sourcing outcomes. Overall Gettysburg saw a 4% increase in YOY inquiries, a 23% increase in submitted applications YOY, and a 3% increase in admits YOY. Gettysburg also saw an 86% increase in new website visitors, with 69% of website traffic through marketing campaigns attributed to Carnegie.

CollegeXpress generated strong engagement as demonstrated by its role in Gettysburg's inquiry pool, with CollegeXpress leads making up 15% of admit/matrics, and 9% of deposits pending for Fall 2023.

**86%**

increase in new website visitors

**15%**

admit/matrics sourced via CollegeXpress

# Grace College

**"Carnege is one of our most high-impact partners. their team gets who we are, our markets, what types of students we're pursuing, and listens well to our needs and goals. Moving to Slate, and choosing to partner with Carnegie as part of that, has been a great decision for Grace College."**

**Mark Pohl, Ph.D.**

AVP of Enrollment Management and Financial Aid  
Grace College

Following several years of stagnant enrollment and institutional financial challenges while following a traditional model of Student Search, Grace College's admissions and marketing leadership knew it was time for a change. The College needed to implement a more strategic enrollment and name-buy process in order to achieve its goals for enrollment growth and operational efficiency. College leadership made the decision to invest in Slate and bring Student Search largely in-house, partnering with Carnegie's Slate Optimization Team for Slate implementation and enrollment campaign strategies.



Grace College delivered an underclassmen Student Search campaign which included print collateral, supported by a full team of designers, writers and project managers.

## + The Strategy

Carnegie's Slate experts worked with Grace's enrollment team on a suite of solutions to "insource" its Student Search, including implementation services, Slate campaigns, and name-buy consultation. By working closely with our team of Slate professionals, Grace College has been able to leverage the CRM's power to streamline day-to-day enrollment marketing operations and make email communications more strategic. As part of its annual inquiry generation strategy, Grace also leverages various CollegeXpress segments, including Christian institutions, to generate right-fit inquiries who express interest in Grace College.

## + The Results

By bringing its communications into its own Slate instance, Grace College has been able to create significant efficiencies and, most importantly, drive remarkable enrollment growth. In the first two years of partnership, Grace College enrolled the third-largest and largest freshman classes in the institution's history in 2020 and 2021, respectively. In fall 2021, Grace enrolled more than 470 students, surpassing its team's original goal by 10 students. Of the entering 2021 class, more than 18% of deposits had engaged with CollegeXpress during their search. From inquiry generation to Slate implementation and consultation solutions, we're proud to serve as an ongoing partner in Grace College's success.

# References

## Michelle Lewis

Associate Vice President Enrollment Management

### Washington State University

PO Box 641048  
Pullman, WA 99164

509.335.5173  
[michelle.d.lewis@wsu.edu](mailto:michelle.d.lewis@wsu.edu)

#### **Scope of Work:**

Our partnership with Washington State University includes Slate Student Search communications, CollegeXpress, and Digital Marketing for both the undergraduate and transfer student enrollment efforts as well as WSU Global.

## Jenny Sawyer

Associate Provost and Executive Director of Admissions

### The University of Louisville

2301 South 3rd Street  
Louisville, KY 40292

502.852.4957  
[jenny.sawyer@louisville.edu](mailto:jenny.sawyer@louisville.edu)

#### **Scope of Work:**

Our partnership with the University Louisville includes Slate Student Search, Digital Marketing, Admitted Student Research, and CollegeXpress lead generation.

## Alejandra C. Sosa Pieroni

Executive Vice President, Division of Enrollment, Marketing, and Student Success

### Georgia Southern University

1332 Southern Drive  
Statesboro, GA 30458

513.635.8409  
[asosapieroni@georgiasouthern.edu](mailto:asosapieroni@georgiasouthern.edu)

#### **Scope of Work:**

Georgia Southern University works with Carnegie as a full-service integrated partner. Our scope of work has included, but is not limited to, web consultation, digital marketing, brand personality and creative, Student Search, Slate consultation, Slate Reporting, and Slate portals.

# The Power of Human Connection

**We believe that genuine connection is the key to capturing attention and building relationships.**

Our core philosophy fuses the principles of psychology with marketing and enrollment innovation. The technical term for this is psychometrics. We think of it as empathy.

By measuring a student's unique behaviors and motivators and marketing to those needs and expectations, we help our client to create real conversations ... one student at a time.

Human Connection leads to action, enrollment, retention, and lasting affinity.

# About Carnegie

# Carnegie at a Glance

For more than 35 years, Carnegie has been a leader and innovator in higher education marketing and enrollment strategy, offering groundbreaking services in the areas of Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Financial Aid Optimization, Website Development, and Creative that generate authentic connections.

## **Higher Education Marketing and Enrollment Strategy**

Carnegie is the future of higher education marketing and enrollment strategy, and has been since 1985.

## **The Power of Human Connection**

We connect colleges with students through the power of human connection. We believe that genuine connection is the key to capturing attention and building affinity. We measure and then market to a student's unique behaviors and motivators to create deep connections and real conversations

## **Custom Solutions**

Carnegie builds custom solutions with best-in-every-class services in Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Financial Aid Optimization, Web Development and Creative that generate student connection. Our approach is data driven, personified, targeted, and customized to solve our clients' unique enrollment needs and challenges.

## **Integrated Services for Marketing and Enrollment**

We deliver what others simply cannot because we have what others do not: original intellectual property, powerful data, precision tools, and decades of market leadership experience.

# 1985

The year our company was founded

# 41

The number of states that we call home

# 341

The number of Carnegie team members across the country

# 12

The number of higher ed industry organizations we call partners

# 11

The number of custom research white papers released over the last year

# 700

The number of institutions we've partnered with over the last year

# 3

The number of major conferences that we host every year

# 3

Top archetypes represented in our team:  
Provider, Explorer, Competitor

# 25

The number of major conferences we present at annually

# Delivering Like No One Else Can

## Depth & Breadth of Expertise

We have a deep bench of higher education experts and specialists in their field—our people set us apart.

## Unique Service Offerings

We offer services you won't find anywhere else, like our proprietary student persona archetype system, CollegeXpress database, Carnegie Student Search, Carnegie Clarity™, and Darts to Digital.

## Data-Driven Decisions

When we say we're data driven we mean it. Our powerful suite of technologies and partners gives us access to over 750 household variables across 250 million households—unmatched enrollment and marketing intelligence for you.

## Art and Science

We harness an unrivaled psychometric methodology. By integrating rich, proprietary data with powerful psychological insights, we develop communications and strategies that generate human connection. There is always an art and a science behind what we deliver.

**5**

The number of years  
we've been a Google  
Premier Partner

**100M+**

The number of students  
we've connected with  
colleges over the years  
through CollegeXpress

**60**

The number of institutions  
that have gone through our  
consensus driven  
Personality model

**250M**

The number of  
households represented  
— with more than 750  
million variables — in our  
CollegeXpress database

**0**

The number of other  
organizations that can  
say they were the first  
Slate preferred partner

**250+**

The number of websites  
launched over the years

**75**

The number of Slate  
instances our team has  
implemented or  
supported

**101**

The number of digital  
certifications completed  
across our team

**28**

The number of awards  
we've received in the last  
year alone for our  
creative work

# Comprehensive Services

We can meet you wherever you are in your journey. Consider our team an extension of your own – focused on your needs, dedicated to your success.

## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.

## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.

## ENROLLMENT STRATEGY

Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.

## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.

## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.

## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.

## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.

## SIGNATURE CREATIVE

By defining what sets you apart and by learning what will speak to your audiences, we create impactful messaging that builds reputation and forges powerful connections.

## SLATE OPTIMIZATION

Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.

## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.

## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.

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# CARNEGIE

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978.692.5092

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# Wheaton College

PROPOSAL

## Financial Aid Optimization Services



CARNEGIE

Silvio Vazquez

Chief Enrollment Management Officer  
Wheaton College

Dear Silvio and members of the review committee:

## Thank you for the opportunity to submit a proposal for Wheaton's financial aid analysis and awarding modeling.

The project-at-hand has far-reaching potential for Wheaton College. It's an opportunity to better understand and optimize the scholarship and financial aid needs prospective Wheaton students and families have. And we believe that we're uniquely positioned to partner with you. Working with us, you'll:

**Have a partner with unmatched expertise in individualized FAO awarding.** We build a strategy that matches each individual student to an institutional aid award designed to maximize the probability that you will meet or exceed your enrollment goals. We deliver multiple enrollment scenarios and work with your team to choose the right fit strategy for Wheaton. Like all of our models, these strategies are built from the ground up, accounting for shifts in market forces and student behavior, year after year.

**Tap into an unmatched depth and breadth of relevant experience.** We've

completed similar projects at Loyola Marymount University, Elon University, Seattle University, and more. Complementing the talents of your team, we'll apply our best collective thinking to the goals and opportunities at Wheaton.

**Embrace a philosophy and approach that is markedly different and fundamentally better than the prevailing standard.** The power of human connection fuels our work. We leverage a basic human need to help you form strong bonds with your audiences that lead to action.

As you review our proposal, please feel free to contact us if you have any questions or would like additional information. Hopefully, this proposal will serve as a springboard for additional conversation and collaboration – we'd love to tailor our approach to your needs.

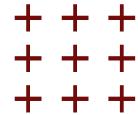
All the best,

**Ben Arendt**  
Executive Sales Lead

# proposal contents

Our talented force of strategic thinkers are passionate about your triumphs. We stack your deck by employing industry leaders and insiders who not only love to succeed but also love to help you change the game. This is how we earn your trust as an invaluable strategic partner.

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# Wheaton College is requesting submission of proposals for a financial aid analysis with the goal of delivering a new aid awarding model for first year and transfer students.

Your RFP reflects your understanding of the need for new, different, and more effective approaches. We understand that your key desired outcomes include:

- + **A review of current and previous aid strategies** to assess their effectiveness at motivating yield behavior in a revenue-efficient manner.
- + **Yield models** that assign a probability of enrollment to each admitted student, to be used in the development of aid strategies but also shared with the College for planning and projection purposes.
- + **Development and implementation of new first year and transfer aid strategies** to control discount rate pressure and stabilize enrollment outcomes.

# Wheaton's Opportunities

A great FAO partner makes all the difference.

With Carnegie, you will experience:

- + Decades Of Financial Aid And Enrollment Management Experience
- + Yield-First Strategy
- + Partnership Approach
- + Real-Time Scenario Strategies
- + Proactive Optimization
- + Customized Solution + Dashboard Reporting



# Our Proposed Approach

The Carnegie approach to financial aid modeling starts with the individual student. Utilizing both institutional data and third-party data on student geodemographic, academic, financial, and behavioral indicators, our team designs predictive models that assign a yield probability to each admitted student. We use those models and yield probabilities to determine the gift aid award for each student that would maximize their contribution to net tuition revenue. We then layer in institutional goals and constraints until we achieve a grant and scholarship strategy that maximizes net tuition revenue alongside key indicators like headcount, discount rate, diversity, and access.





# Carnegie's Competitive Advantages

## 1 CUSTOMIZED

Custom predictive analytics and tools tailored to individual needs, driving optimal and ongoing enrollment performance

## 2 INDIVIDUALIZED

Best practice predictive tools and models that drive enrollment at the individual student level

## 3 OPTIMIZING

Ongoing consulting and scenario-based evaluations, powerful dashboards, and real time tracking you can rely on to meet your goals

## 4 OUTPERFORMING

Adaptive modeling process designed to learn and outperform now and in the long-term

# Our Approach to Financial Aid Optimization

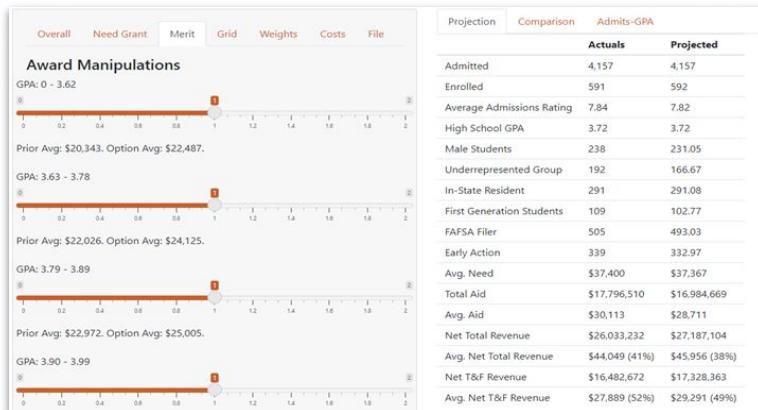
We will deliver:

- + Sophisticated yield models that incorporate both institutional and third-party behavioral data, with student-level probability scores regularly delivered, to be incorporated into your Slate instance.
- + Aid optimization strategies driven by an algorithmic approach to revenue and enrollment optimization.
- + A live aid strategy simulation environment where the Wheaton College and Carnegie teams can work together to test different award strategies and immediately review projected outcomes.
- + An understanding of how to shift resources between merit- and need-based aid programs to ensure you meet key enrollment goals.
- + Regular strategy meetings to run through aid strategy simulations, discuss questions or proposals of aid reallocation, and rapidly show how shifting aid investments across different populations may contribute to meeting or exceeding enrollment goals.

# Live Simulations of Strategy Outcomes

The Modeling Team at Carnegie developed our live strategy simulation tool to provide a more rapid and transparent approach to financial aid optimization. Your custom yield models and revenue optimization algorithms will be loaded to the environment and our team will design a series of initial strategy proposals for your review. Then, in a series of detailed strategy meetings we can quickly:

- + Simulate different aid interventions and associated enrollment outcomes.
- + Assess the interaction between changes to admit population assumptions and aid strategies.
- + Test the impact of different pricing decisions.



# First Year Retention Modeling

Alongside student-level data and information about initial enrollment outcomes, during the discovery period we collect information about first year retention for the same cohorts.

As we explore different aid allocation and optimization strategies with the College's enrollment team, we will also highlight how those strategies might impact retention.

Including retention modeling explicitly in the financial aid strategy development process ensures that ongoing student success is included as an enrollment goal alongside yield, initial enrollment, and net revenue.

## Updated Retention Model

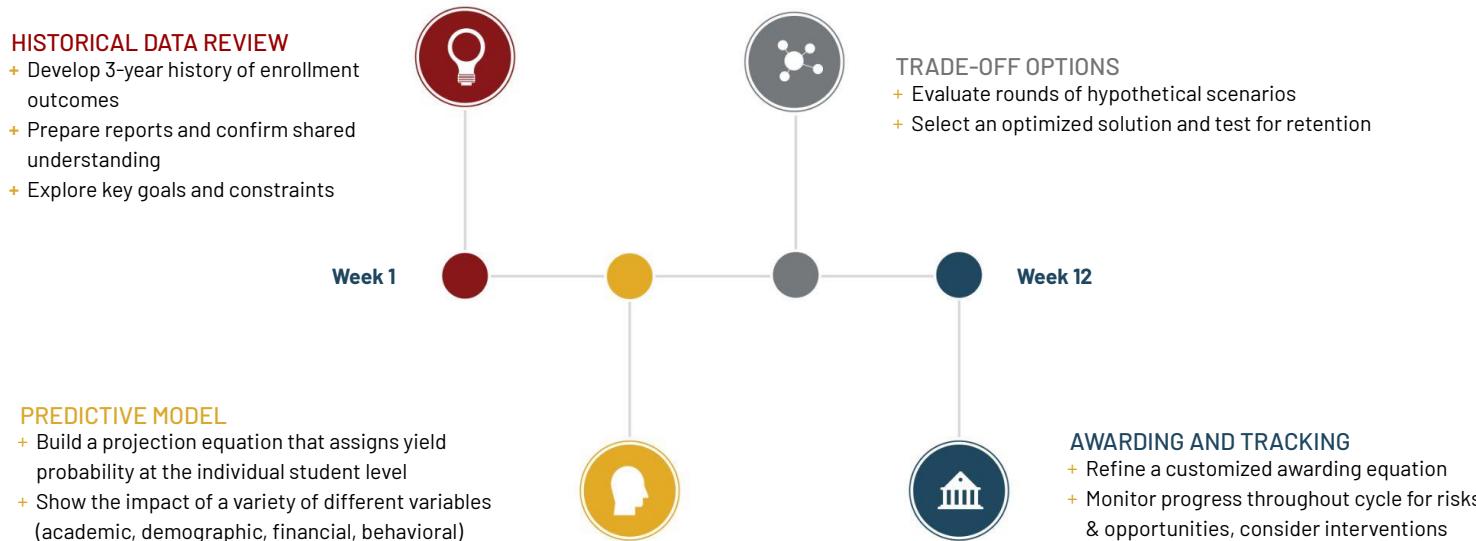
Two-year model built using Fall 2021 and Fall 2022 cohort census data.

| Factor          | Direction | Marginal Effect<br>(holding other variables constant) |
|-----------------|-----------|---|
| International   | +         | +5%   |
| Net Cost        | -         | -3% per \$10,000 of Net Cost                          |
| FAFSA Filer     | +         | +3%   |
| Early Admit     | +         | +6%   |
| High School GPA | +         | +3% per 0.25 GPA Point                                |
| Student Need    | -         | -4% per \$10,000 of Need                              |

Example first year retention slide with example factors and simulated average marginal effects.

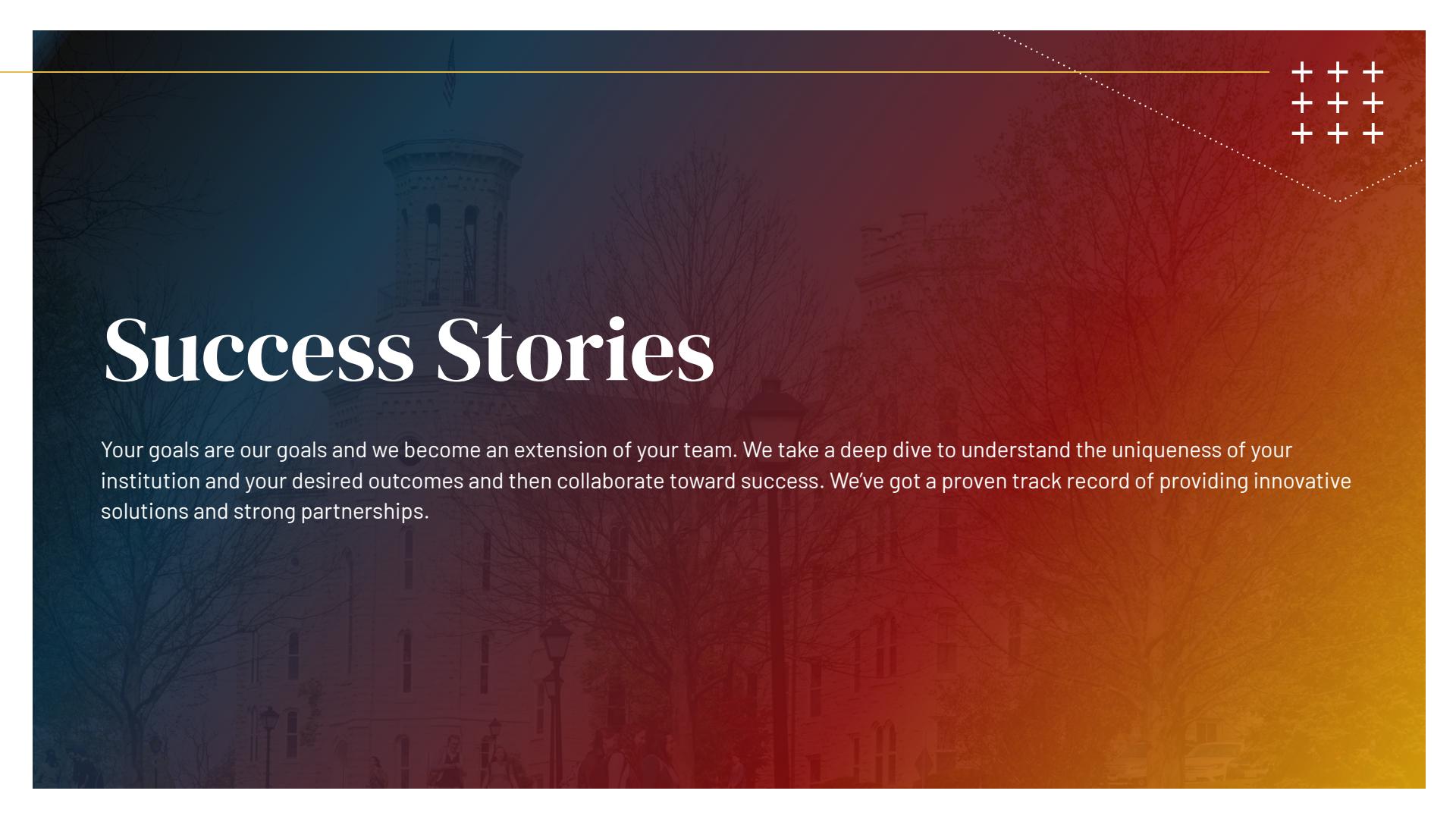
# Project Overview

The figure below provides an overview of a Carnegie financial aid optimization project from start to finish. Our engagement approach is designed to minimize administrative burden on your team from the moment we begin data collection through implementation and the conclusion of the cycle.



# Recommended Investment

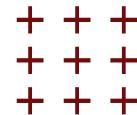
| Service                           | Scope of Work Summary   | Cost            |
|-----------------------------------|---|-----------------|
|                                   | <p>Utilizing institutional and third-party data on student geodemographic, academic, financial, and behavioral indicators, our team will design predictive models that assign a yield probability to each admitted student to determine the right institutional aid award. We merge our analysis with your unique institutional goals and constraints to deliver a comprehensive grant and scholarship strategy that maximizes net tuition revenue alongside key indicators like headcount, discount rate, diversity, and access for lower income students.</p>   |                 |
| <b>Financial Aid Optimization</b> | <p>Development of a yield model, an institutional gift aid strategy, and projections of cohort outcomes. Implementation delivered via an individualized awarding strategy with customized awards for each admitted student, to be integrated into the institutional award packages. Includes a lead scoring model and regular lead tagging, first year retention modeling, strategy simulation tool, and regular tracking meetings facilitated with our Analytics Dashboard. Inclusive of regular student tagging, delivered weekly until census.</p> <p><i>2 populations (first year and transfer), customized report, bi-weekly team meetings, 1 enrollment cycle (until census).</i></p> | <b>\$80,000</b> |



# Success Stories

Your goals are our goals and we become an extension of your team. We take a deep dive to understand the uniqueness of your institution and your desired outcomes and then collaborate toward success. We've got a proven track record of providing innovative solutions and strong partnerships.





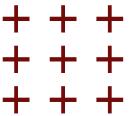
# Asbury University

**"In-house Student Search through Carnegie has given us a tool to meet students where they are in the ways they want to be communicated with. We're able to connect with students who understand our message and who yield at a much higher return."**

**Jennifer McChord**

Vice President Of Enrollment And Marketing  
Asbury University

Asbury University, a private Christian institution, needed an integrated enrollment marketing partner to support its goals for growth and market differentiation. Previous Student Search strategies had failed to demonstrate the yield results and return on investment the University needed.

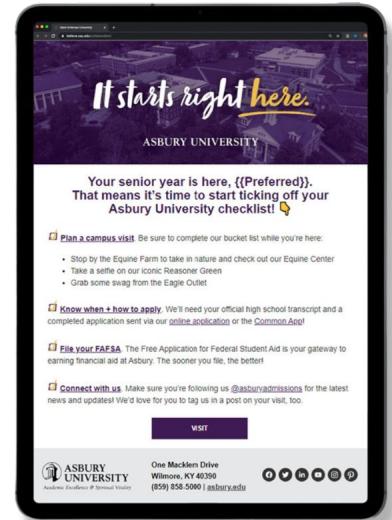


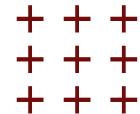
## ⊕ The Strategy

Carnegie's partnership started with consensus-building brand strategy to build an understanding of the University's core differentiators and how to express them. Carnegie has since partnered with Asbury for a variety of integrated solutions, including audience segmentation (Darts), creative and multimedia development, digital marketing, and financial aid optimization. Carnegie integrated Asbury's personality and Darts into Slate and executed an in-house segmented Student Search across sophomore, junior, and senior audiences. The Slate Optimization partnership also included communication planning, name buy consultation, report building, and campaign monitoring. Financial aid optimization designed a campaign to bring down discount numbers..

## ⊕ The Results

Asbury has experienced several indications of the positive impact of a Carnegie partnership. Enrollment leadership noted improved melt and yield rates, increased use and utility of their CRM investment, and consistency in brand expression across campus. Carnegie-generated Student Search inquiries yielded at a rate of 33.5% (versus 30.4% the previous year). Asbury has also seen increases in campus visits, applications, and admitted students during the partnership, resulting in an overall 50% increase in net tuition revenue. As Asbury seeks to continue to build classes of right-fit prospective students and achieve its goals for awareness and enrollment growth regionally and beyond, Carnegie is proud to serve as the University's partner..





**“The Financial Aid Optimization Team at Carnegie has been a valued partner to LMU for 15 years with consistently strong results. Over this time, the team has built an understanding of our mission, our opportunities, and our challenges, which has added significant value to their analytical work for us. We appreciate the sophistication of their work and the trust that has been built over our partnership.”**

**Maureen Weatherall, EdD**

Vice Provost, Enrollment Management  
Loyola Marymount University

# Loyola Marymount University

Loyola Marymount University faced the challenge of recruiting in an extremely competitive market with tight institutional aid budgets—even with the advantages of an excellent academic reputation and enviable location on a bluff overlooking the Pacific Ocean.



## The Strategy

Carnegie's Financial Aid Optimization team supplemented LMU's first-year student financial aid optimization work with transfer enrollment consulting and aid optimization, market research with prospective and admitted students, retention modeling and intervention strategies, continuing student survey analysis, and custom consulting engagements on enrollment and fiscal planning.

## The Results

During our partnership, first-year enrollment at LMU has grown by more than 40%, and first-year net tuition revenue has increased by 115% while remaining within planned discount rates and improving selectivity. Over the same period, the proportion of historically underrepresented first-year students at LMU has grown from 24% to more than 34%. LMU's transformation into an international institution has also been notable; in fall 2007, only about 30% of enrolling students hailed from outside California. By fall 2022, that proportion was 48%, including 11% from outside the United States. This enrollment success has been a key driver of LMU's ascent to a top 100 institution in U.S. News & World Report's national rankings. LMU has worked with Carnegie's Financial Aid Optimization team (formerly Maguire Associates) for 15 years. Over this period of work together, our teams have navigated the Great Recession; the COVID-19 pandemic; multiple changes to standardized testing, high school GPA, and other key application indicators; and significant shifts in the composition of LMU's applicant pool on geodemographic, academic, and financial fronts.

**40%**

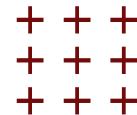
First-year enrollment growth

**115%**

Increase in first-year net tuition revenue, while remaining within planned discount rates + improving selectivity

**29%**

Increase in the proportion of historically underrepresented first-year students at LMU



# Seattle University

**"It is evident the recent growth in our FTIC enrollment is due in part to the Financial Aid Optimization team at Maguire Associates [a Carnegie company]. They helped us set and ultimately exceed enrollment targets two years running. Through their research and modeling, we were able to hone our search, recruitment and financial aid planning and develop an initial 5-year enrollment model to anticipate challenges and identify opportunities we may not have otherwise considered."**

**Melore Nielsen**

Vice Provost for Enrollment Management  
Seattle University

Seattle University was looking to bring stability to fluctuating enrollment outcomes and create a plan for sustainable enrollment growth. With student retention as a key area of focus, the University needed a partner that could help them understand what factors were proven to contribute to student success. Developing an optimized financial aid strategy not just for the challenges of recruiting students in the first year but for recruiting best-fit students in the face of competitive and demographic challenges was absolutely critical.



## The Strategy

We provided Seattle U with a multilayered, research-driven approach to meeting this set of multifaceted goals. Through a series of predictive models built at the individual student level, the University was able to build a strong understanding of the significant drivers of application, yield, and retention behavior and use the results of these models to adjust recruitment strategies for the upcoming fall class.

Optimizing Seattle U's aid strategies ensured the institution's strategic priorities were front and center when it came to distributing a fixed aid budget. With the whole higher education industry observing the effects of a global pandemic on student retention—and with a looming "demographic cliff" ever present in strategic recruitment conversations—the University turned to its partnership with the Financial Aid Optimization team for more insight.

The team conducted a primary research study on student retention and satisfaction to uncover the deeper reasoning behind student attrition from the perspective of students past and presently enrolled. In addition, we simultaneously built a robust and adaptive five-year enrollment planning model in order to give a long-term view of the opportunities for recruitment and inherent challenges within their primary and secondary recruiting markets.

## The Results

Seattle U has exceeded its first-year enrollment target for the second consecutive year, representing a 12% growth over the partnership period. The Financial Aid Optimization team's multi-year enrollment model and predictive analytics tools now guide decision-making when it comes to search purchases, recruiting travel, and financial aid allocation. Seattle U has allocated resources effectively to ensure student satisfaction and retention are the primary pillars of their efforts by adding a minimum need award, responding directly to concerns expressed by students through our research.

**1000+**

Newly enrolled first-year  
students for two  
consecutive years

**12%**

Growth in student  
population over the  
partnership period

**15.3%**

Yield rate for 2022  
year-to-date

# References

## Jennifer McChord

Vice President of Enrollment and  
Marketing

### Asbury University

One Macklem Drive  
Wilmore, KY 40390

859.858.5175

jennifer.mcchord@asbury.edu

### Scope of Work:

Over the last five years, Asbury has engaged with Carnegie across a comprehensive suite of services from Digital to Lead Generation, Brand Personality, Slate, Web, and Financial Aid Modeling. Now, Asbury employs the Carnegie Student Search model in its recruitment efforts.

## David Mee

Vice President for Enrollment  
Management

### Campbell University

143 Main Street  
Buies Creek, NC 27506

910.893.1291

dmee@campbell.edu

### Scope of Work:

Campbell University partners with Carnegie on a Financial Aid Optimization scope of work.

## Kristy Collins

Dean of Enrollment Management

### Pepperdine University

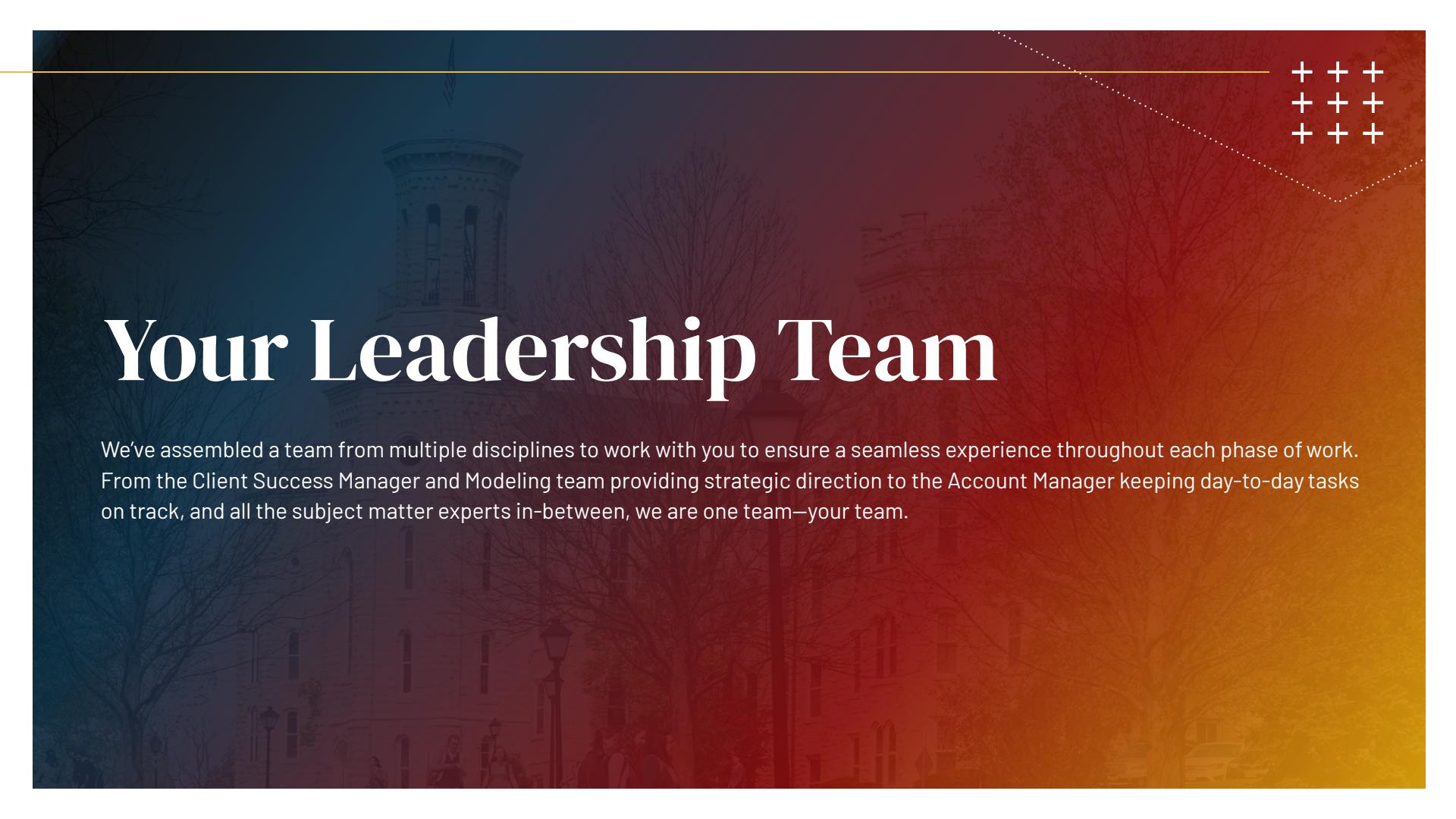
24255 Pacific Coast Highway  
Malibu, CA 90263

310.506.4116

kristy.collins@pepperdine.edu

### Scope of Work:

Pepperdine University works with Carnegie for a variety of enrollment management support, including CollegeXpress lead generation, digital marketing, and financial aid optimization.



# Your Leadership Team

We've assembled a team from multiple disciplines to work with you to ensure a seamless experience throughout each phase of work. From the Client Success Manager and Modeling team providing strategic direction to the Account Manager keeping day-to-day tasks on track, and all the subject matter experts in-between, we are one team—your team.





## Dr. Ben Arendt

### Client Success Leader and Your Strategic Partner

---

#### Persona

The Expressive and Philosophical Detective



With more than 20 years of higher education experience, Ben knows how to transform clients' unique challenges into opportunities for success. Ben is an imaginative and enthusiastic problem solver, with expertise in everything from student affairs and teaching to visit programs and enrollment programs.

He's motivated by understanding the people, goals, and priorities that make up the unique identity of each client community— connecting them to Carnegie strategies that drive results. A highly accomplished presenter, Ben speaks at several industry conferences each year on the rise of the enrollment ecosystem.

## Meet Your Leadership Team



**Mike Keane**  
SVP, Modeling + Client Strategy

**Persona**  
The Influential and Resilient Energizer



Mike leads modeling projects for clients, provides financial aid policy and operations expertise, and advises on a range of topics within enrollment management. Previously, Mike served as the Assistant Vice Provost for Financial Aid at Loyola Marymount University, where he led a financial aid team of more than 20 staff members and oversaw an aid portfolio exceeding \$240 million. Mike has 12+ years of experience in enrollment data collection, analysis, and reporting. Mike has a Ph.D. in Political Science from the University of Notre Dame and a B.A. in History and Latin from Loyola Marymount University.



**David Wuinee**  
VP, Client Strategy

**Persona**  
The Attentive and Analytical Theorist



David has more than 30 years of enrollment experience, including in admissions, financial aid and scholarships, enrollment management, and more. As VP, Client Strategy, David leverages his experience to help clients optimize their enrollment and awarding strategies.



**Emily Devine**  
Senior Analyst, Modeling

**Persona**  
The Supportive and Analytical Dreamer



As a Senior Analyst, Emily designs and analyzes predictive models to help educational institutions understand the factors that predict student application, enrollment, and retention. She also optimizes the allocation of limited financial aid budgets and supports institutions as they strive for their long-term enrollment goals.



**Dave Viggiano**  
EVP, Research, Modeling, Strategy

**Persona**  
The Resilient and Rebellious Ringleader



David Viggiano has dedicated more than two decades to designing strategic communications, enrollment, and research solutions that empower colleges and universities to elevate their brands and reputations. "Vigg" is an expert at coordinating with leadership at the highest levels of institutions, and he has an unmatched ability to identify and solve the most pressing needs of organizations across the country.



**Kayla Gaier**  
VP, Account Management

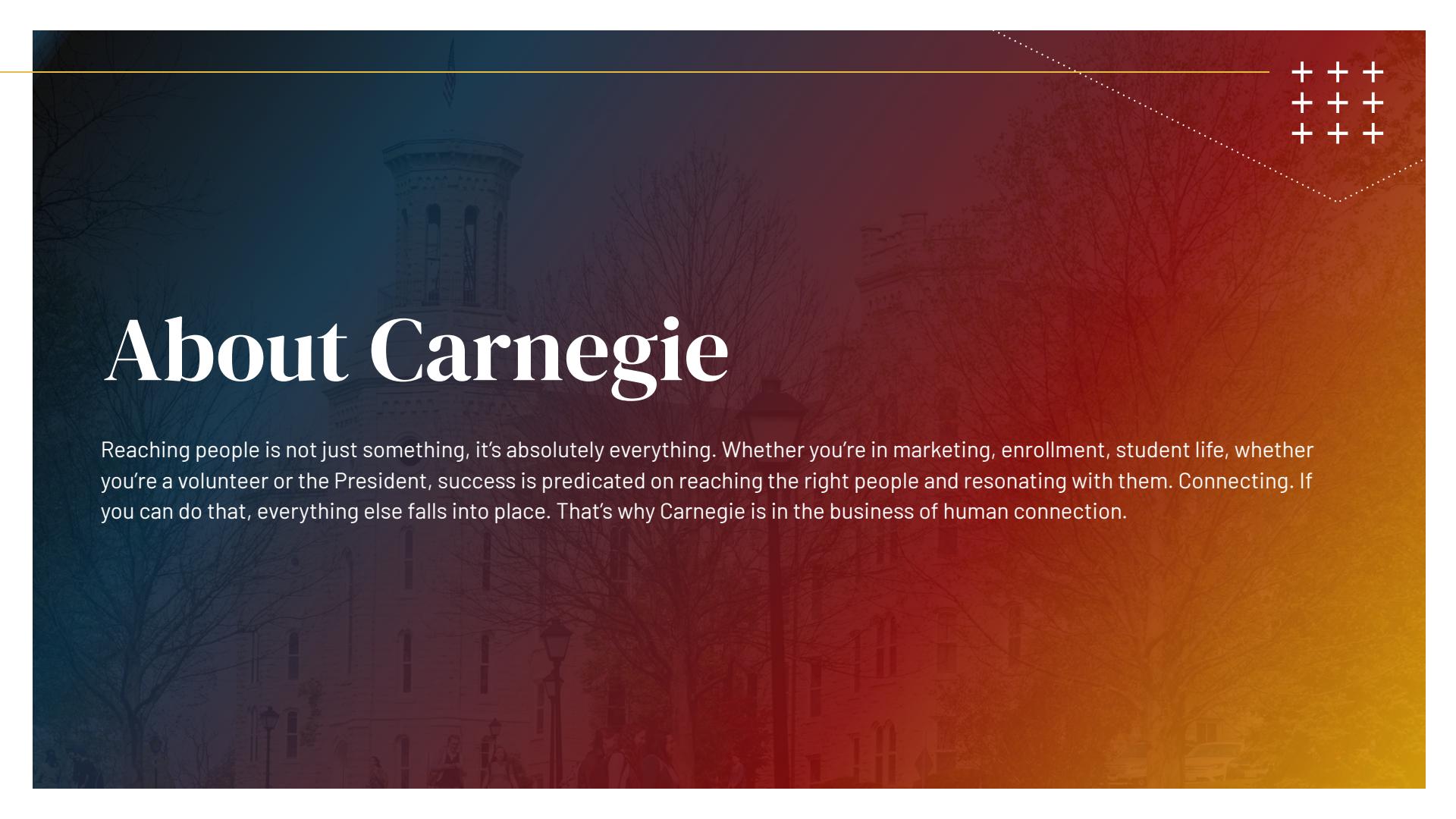
**Persona**  
The Competitive and Compassionate Guide



Kayla lives and breathes digital marketing, overseeing the Account Management team to ensure top-notch communication, project management, and client service. She has more than a decade of experience in digital strategy and marketing management, and she is passionate about assisting clients with complex strategic campaigns that empower them to achieve their goals.

# Carnege's Persona Archetypes Key

|  |  |  |  |  |
|--|--|--|--|--|
| <p><b>Innovator</b></p> <p><b>Brilliant and forward-thinking</b><br/>Driven by inventing the future through innovation. Delivers advancement, ingenuity, and radical outcomes. Values newness, experimentation, and progress. Causes people to feel awe and amazement.</p>  | <p><b>Explorer</b></p> <p><b>Adventurous and inquisitive</b><br/>Driven by the quest for discovering the unknown. Delivers progress and an unmatched interest for uncovering truth. Values investigation, curiosity, and trailblazing. Causes people to feel intrigued and emboldened.</p>  | <p><b>Creator</b></p> <p><b>Creative and imaginative</b><br/>Driven by self-expression and artistry. Delivers something new that encourages creativity. Values originality, ideation, and new concepts. Causes people to feel constructive and expressive.</p>      | <p><b>Competitor</b></p> <p><b>Resilient and tenacious</b><br/>Driven by overcoming challenges through grit and determination. Delivers surprising strength, perseverance, and toughness. Values fortitude and hard work. Causes people to feel triumphant and inspired.</p>  | <p><b>Rebel</b></p> <p><b>Daring and rebellious</b><br/>Driven by challenging and redefining the norm. Delivers empowerment, change, and boldness. Values independence, guts, and breaking with convention. Causes people to feel unrestrained and fearless.</p>  |
| <p><b>Provider</b></p> <p><b>Supportive and selfless</b><br/>Driven by compassion, warmth, and the desire to care for others. Delivers nurturing, comfort, and protection. Values altruism, commitment, and generosity. Causes people to feel valued and supported.</p>     | <p><b>Entertainer</b></p> <p><b>Energetic and enthusiastic</b><br/>Driven to entertain and cause others to get excited. Delivers fun and the desire to amuse and uplift. Values energy, playfulness, and enjoyment. Causes people to feel exhilarated and happy.</p>                        | <p><b>Sophisticate</b></p> <p><b>Sophisticated and refined</b><br/>Driven by experience, elegance, and beauty in all forms. Delivers excellence, finesse, and vitality. Values poise, intentionality, and beauty. Causes people to feel desired and important.</p>  | <p><b>Achiever</b></p> <p><b>Powerful and assertive</b><br/>Driven by growth and being a frontrunner. Delivers stability, pride, and strength. Values power, influence, and accomplishment. Causes people to feel confident and in control.</p>                               | <p><b>Beige</b></p> <p><b>Generic and confused</b><br/>Beige, though not considered an archetype in our model, is still an important consideration. Beige indicates either a completely neutral personality expression or one that attempts to do everything at once.</p>  |



# About Carnegie

Reaching people is not just something, it's absolutely everything. Whether you're in marketing, enrollment, student life, whether you're a volunteer or the President, success is predicated on reaching the right people and resonating with them. Connecting. If you can do that, everything else falls into place. That's why Carnegie is in the business of human connection.



# The Power of Human Connection.

**We believe that genuine connection is the key to capturing attention and building relationships.**

Our core philosophy fuses the principles of psychology with marketing and enrollment innovation. The technical term for this is psychometrics. We think of it as empathy.

By measuring a student's unique behaviors and motivators and marketing to those needs and expectations, we help our client to create real conversations ... one student at a time.

Human Connection leads to action, enrollment, retention, and lasting affinity.



# Carnegie at a Glance

For more than 35 years, Carnegie has been a leader and innovator in higher education marketing and enrollment strategy, offering groundbreaking services in the areas of Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Financial Aid Optimization, Website Development, and Creative that generate authentic connections.

## ● Higher Education Marketing and Enrollment Strategy

Carnegie is the future of higher education marketing and enrollment strategy, and has been since 1985.

## ● The Power of Human Connection

We connect colleges with students through the power of human connection. We believe that genuine connection is the key to capturing attention and building affinity. We measure and then market to a student's unique behaviors and motivators to create deep connections and real conversations

## ● Custom Solutions

Carnegie builds custom solutions with best-in-every-class services in Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Financial Aid Optimization, Web Development and Creative that generate student connection. Our approach is data driven, personalized, targeted, and customized to solve our clients' unique enrollment needs and challenges.

## ● Integrated Services for Marketing and Enrollment

We deliver what others simply cannot because we have what others do not: original intellectual property, powerful data, precision tools, and decades of market leadership experience.

# 1985

The year our company was founded

# 41

The number of states that we call home

# 341

The number of Carnegie team members across the country

# 12

The number of higher education organizations we partner with annually including NACAC, NAGAP, UPCEA and more

# 11

The number of custom research white papers released over the last year

# 700

The number of institutions we've partnered with over the last year

# 3

The number of major conferences that we host every year

# 3

Top archetypes represented in our team: Provider, Explorer, Competitor

# 25

The number of major conferences we present at annually

# Delivering Like No One Else Can

## Depth & Breadth of Expertise

We have a deep bench of higher education experts and specialists in their field—our people set us apart.

## Unique Service Offerings

We offer services you won't find anywhere else, like our proprietary CollegeXpress database, Carnegie Student Search, Carnegie Clarity™, and Darts to Digital.

## Data-Driven Decisions

When we say we're data driven we mean it. Our powerful suite of technologies and partners gives us access to over 750 household variables across 250 million households—unmatched enrollment and marketing intelligence for you.

## Head and Heart

We harness an unrivaled psychometric methodology. By integrating rich, proprietary data with powerful psychological insights, we develop communications and strategies that generate human connection.

**5**

The number of years  
we've been a Google  
Premier Partner

**0**

The number of other  
organizations that can  
say they were the first  
Slate preferred partner

**60**

The number of institutions  
that have gone through our  
consensus driven  
Personality model

**250M**

The number of  
households represented  
— with more than 750  
million variables — in our  
CollegeXpress database

**100M+**

The number of students  
we've connected with  
colleges over the years  
through CollegeXpress

**11**

The number of custom  
research released in the  
form of white papers  
over the last year

**101**

The number of digital  
certifications completed  
across our team

**75**

The number of Slate  
instances our team has  
implemented or  
supported

**28**

The number of awards  
we've received in the last  
year alone for our  
creative work

# Comprehensive Services

We can meet you wherever you are in your journey. Consider our team an extension of your own – focused on your needs, dedicated to your success.

## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.

## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.

## ENROLLMENT STRATEGY

Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.

## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.

## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.

## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.

## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.

## SIGNATURE CREATIVE

By defining what sets you apart and by learning what will speak to your audiences, we create impactful messaging that builds reputation and forges powerful connections.

## SLATE OPTIMIZATION

Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.

## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.

## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.



# CARNEGIE

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978-692-5092 | [info@carnegiehighered.com](mailto:info@carnegiehighered.com)

[carnegiehighered.com](http://carnegiehighered.com)

# 1985

The year our company was founded

# 41

The number of states that we call home

# 341

The number of Carnegie team members across the country

# 12

The number of higher ed industry organizations we call partners

# 11

The number of Slate instances our team has implemented or supported

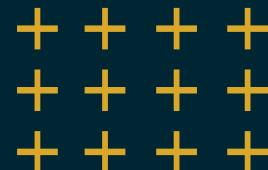
# 47

The number of awards we've received in the last year alone for our creative work



# Ithaca College

CARNEGIE



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# Our Proposed Approach

# High-Level Budget Summary

| Service   | Scope of Work Summary  | Cost                  |
|---|--|-----------------------|
| <b>CollegeXpress Lead Generation</b>  | Connecting with prospective students at every stage of their journey is more challenging than ever before. CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.  | \$28,500              |
| <b>Financial Aid Optimization</b><br><i>2 Tier Options</i>  | We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.  | \$60,000 - \$70,000   |
| <b>Admitted Student Research</b>  | A mixed methods survey built in and distributed through Slate to admitted students after they deposit or decline. Survey remains open until one month past the Client decision deadline date. Questions in the survey to be selected from a list of more than 100 templated options covering topics such as search behaviors, value propositions, institutional and respondent personality, financial aid, communication tactics, and more.  | \$9,275               |
| <b>Dart Tagging</b>   | Unlimited annual Dart tagging for all prospective undergraduate students, tagged once monthly for 12 months.   | \$18,000              |
| <b>Slate Communications</b><br><i>Individual Campaign prices vary.<br/>Price representative of bundled range.</i> | Tailor any Slate communications based on academic, demographic, psychometric, and custom data points and generate connection with highly relevant messages. No data transfers involved, and real-time campaign reporting is built in.  | \$153,000             |
| <b>Name Buy Consultation</b>  | This enrollment analysis and strategy plan will inform decision-making processes with specific recommendations relative to student search and contribute to the optimization of enrollment strategies.   | \$24,500              |
| <b>Slate Parent Portal</b>  | We build your portal from scratch, using web best practices like dynamic content and on-brand design.  | \$25,000              |
| <b>Digital Marketing Strategy</b>   | Strategy, execution, and management of all paid digital media. Set up across all digital platforms including keyword research, creation of target audiences, development of all copy and ad text, including testing variations, bidding strategies, etc. Access to a live dashboard to monitor digital campaigns as well as ongoing analysis from Digital team, including performance insights, trends, and recommendations when applicable. | \$366,640 - \$381,640 |
| <b>Total</b>  |  | \$684,915 - \$709,915 |

# CollegeXpress Lead Generation Detail

# The Most Powerful Lead Generation Engine: CollegeXpress

Connecting with prospective students at every stage of their journey is more challenging than ever before. CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

- + Network of 6 million+ active prospective students and parents
- + Visibility and reach to over 250 million households
- + Year-round lead generation, including early pipeline development of sophomores and juniors
- + Regional presence and new geographical visibility
- + Daily lead delivery directly into your CRM to begin lead nurturing

Averaging ~ **14% first source contribution** to enrolled classes, making it **two to three times more effective** than any other source.

**CollegeXpress users make up roughly 14% of a client's depositing classes, making it two to three times more effective than any other resource.**

### LEAD GEN IN ACTION

- + Connect with your target audience, including Science & Engineering, Health & Medicine, Business, Education, and over 35 other segments
- + 460,000+ connected students and colleges produced 3.4 million inquiries last year
- + Access to millions of names and reach to over 250 million households
- + Industry-leading and pioneering digital marketing strategies power unmatched engagement reflective of today's student audience behaviors
- + Hundreds of thousands of monthly visitors and registrants to industry-leading CollegeXpress.com

# CollegeXpress Investment

| Service                                    | Scope of Work Summary   | Cost     |
|--|---|----------|
| <b>State Select with State Integration</b> | <p>Lead Gen campaign to prospective students focused on targeted 5-state region via CollegeXpress platform. Includes database access, CollegeXpress.com profile development, and CRM integration. State recommendations: NY, NJ, PA, MD, TX</p> <p>Includes up to four source formats for lead import, SFTP service account and folders, import automation, origin source configuration for all CollegeXpress sources, and pull of historical enrollment pipeline for conversion rate analysis.</p> | \$10,000 |
| <b>Health &amp; Medicine</b>               | Lead Gen campaign focused on students interested in a health or medical career. Majors of interest include pre-medicine, pre-dentistry, nursing, physical therapy, pharmacy, occupational therapy, sports medicine, and more.   | \$5,000  |
| <b>Business</b>                            | Lead Gen campaign focused on students interested in majoring in business, including accounting, economics, finance, marketing, project management, and more.  | \$5,000  |
| <b>Diversity</b>                           | Lead Gen campaign focused on students of color. Year-round, unlimited hand raisers, delivered daily.  | \$3,500  |
| <b>Prospect Database</b>                   | Search for and conduct outreach to students in the CollegeXpress database at any time. Customize your audiences based on student and parent data including top college choices, graduation year, athletics, majors, location, GPA, gender, religion, and more. 250,000 send limit.  | \$5,000  |
| <b>Total Investment</b>                    |   | \$28,500 |

# Financial Aid Optimization Detail

# A great FAO partner makes all the difference

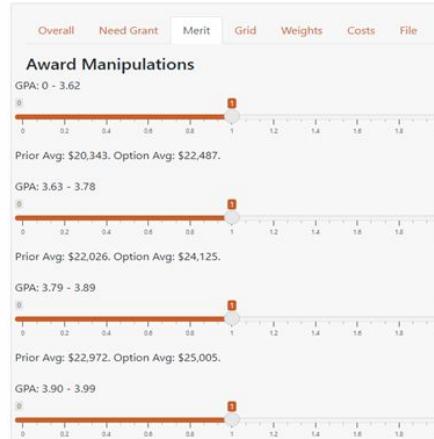
- + Decades of Financial Aid and Enrollment Management Experience
- + Yield-First Strategy
- + Partnership Approach
- + Real-Time Scenario Strategies
- + Proactive Optimization
- + Innovative Approach to the Traditional “Grid”
- + Customized Solution + Dashboard Reporting

# Financial Aid Optimization

The Carnegie approach to financial aid modeling starts with the individual student. Utilizing both institutional data and third-party data on student geodemographic, academic, financial, and behavioral indicators, our team designs predictive models that assign a yield probability to each admitted student. We use those models and yield probabilities to determine the institutional aid award for each student that would maximize their contribution to net tuition revenue. We then layer in institutional goals and constraints until we achieve a grant and scholarship strategy that maximizes net tuition revenue alongside key indicators like headcount, discount rate, diversity, and access for lower income students.

## What you'll gain:

- + A model and aid optimization strategy that is flexible to adapt to new or changing resources.
- + An understanding of the most efficient way to utilize new scholarship resources.
- + An understanding of how to shift resources between merit- and need-based aid programs to ensure that the funds are helping move you toward meeting key enrollment goals.
- + A live simulation environment (pictured here) with your yield models built in.
- + Regular strategy meetings to run through scenarios with the live tools, discuss questions or proposals of aid reallocation, and rapidly show how shifting aid investments across different populations may contribute to meeting or exceeding enrollment goals.



|                           | Projection     | Comparison     | Admits-GPA |
|---------------------------|----------------|----------------|------------|
|                           | Actuals        | Projected      |            |
| Admitted                  | 4,157          | 4,157          |            |
| Enrolled                  | 591            | 592            |            |
| Average Admissions Rating | 7.84           | 7.82           |            |
| High School GPA           | 3.72           | 3.72           |            |
| Male Students             | 238            | 231.05         |            |
| Underrepresented Group    | 192            | 166.67         |            |
| In-State Resident         | 291            | 291.08         |            |
| First Generation Students | 109            | 102.77         |            |
| FAFSA Filer               | 505            | 493.03         |            |
| Early Action              | 339            | 332.97         |            |
| Avg. Need                 | \$37,400       | \$37,367       |            |
| Total Aid                 | \$17,796,510   | \$16,984,669   |            |
| Avg. Aid                  | \$30,113       | \$28,711       |            |
| Net Total Revenue         | \$26,033,232   | \$27,187,104   |            |
| Avg. Net Total Revenue    | \$44,049 (41%) | \$45,956 (38%) |            |
| Net T&F Revenue           | \$16,482,672   | \$17,328,363   |            |
| Avg. Net T&F Revenue      | \$27,889 (52%) | \$29,291 (49%) |            |

# Project Overview

The figure below provides an overview of a Carnegie financial aid optimization project from start to finish. Our engagement approach is designed to minimize administrative burden on your team from the moment we begin data collection through implementation and the conclusion of the cycle.



# Project Differentiators

## **1. We begin with Net Tuition Revenue maximization.**

Our modeling process is designed to begin with net tuition revenue maximization before building in institutional goals and constraints. This approach acknowledges that the design and execution of an institutional aid strategy is often the product of a careful consideration of a number of different (sometimes competing) goals. For instance, institutions often wish to increase access for lower-income students like Pell Grant and state need-based grant recipients, although investments in institutional aid for the highest need populations often erode net tuition revenue. Our modeling and strategy building strikes a balance between those goals and constraints.

During the model building and strategy design phases, we engage in an active and collaborative process with our clients, identifying key tradeoffs and prioritizing those goals that are most critical to institutional leadership. This iterative process is critical to ensuring that our clients understand the strategy and that we maximize the effectiveness of limited resources by focusing those resources on the most important enrollment goals.

## **2. We integrate first-year retention modeling directly into every project.**

Alongside student-level data and information about initial enrollment outcomes, during the discovery period we will collect information about first-year retention for the same cohorts. As we explore different aid allocation and optimization strategies with the College's enrollment team, we will also highlight how those strategies might impact retention. For instance, net cost or unmet student need are often key factors in our retention models; first-year aid strategies that maximize net revenue in year 1 may result in lower revenue and student success outcomes over time if they increase revenue at the expense of higher unmet need. By including retention modeling explicitly in the financial aid strategy development process, we ensure that ongoing student success is included as an enrollment goal alongside yield, initial enrollment, and net revenue.

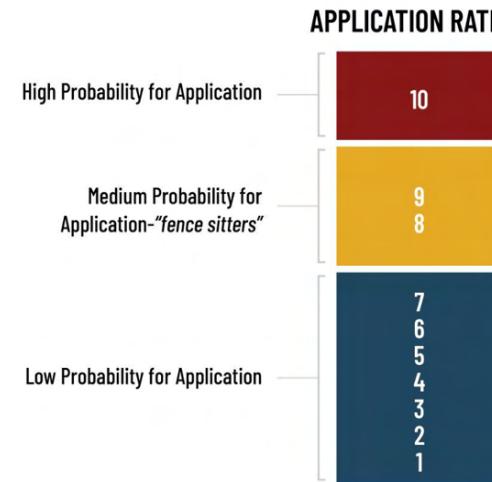
# Application Conversion Modeling

## We include application conversion modeling with each project.

Why? Because we believe that a successful yield and aid strategy begins at the top of the funnel. Our service for optimizing student recruitment offers data analysis, research, and consulting for the earliest stage of the enrollment lifecycle through the point of application, and transforms raw admission and recruitment data into actionable information to increase your inquiry- or prospect-to-applicant conversion.

Our application conversion modeling is motivated by the question, **“what is the probability that a prospective student will act on their interest and apply to the College?”** Colleges and universities invest significant resources – in both time and money – each year in developing a robust prospect and inquiry pool to ensure sustainable growth in applications and help meet enrollment goals. However, prospective student sources are varied (e.g., purchased search names from testing services, lead generation from college planning websites) and many institutions have experienced erosion in application conversion in recent years as they expand the size and scope of their prospective student outreach. We have designed this service to help you focus your limited recruitment resources on student segments where you can boost application conversion most effectively.

Using data on prospects, inquiries, and applicants collected during the discovery period, our team will use multiple sophisticated machine-learning models that integrate prospect and inquiry data alongside contextual information available from third-party sources like the Experian consumer database and the American Community Survey to identify additional factors associated with application conversion among prospects and inquiries. After we develop an application conversion model using your historical data, we will tag all current prospective students with their probability of converting to applicants and then continue to tag the pool throughout the cycle at a frequency that meets the College’s needs. If student-level data change during the cycle, the probability scores will update to reflect the associated change to probability. We categorize inquiries into one of ten probability groups, from “very low probability” to “very high probability” of converting. Our clients have used these tags to alter messaging plans to increase conversion as well as improve cost efficiency in the recruitment process.



# Institutional, external, and proprietary geodemographic data

## We utilize institutional, external, and proprietary geodemographic data.

The institutional data sources used in the modeling are typically derived from the application for admission as well as the FAFSA (if applicable), and include:

- Funnel indicators like application, admit, deposit, enroll, withdraw, and retain flags along with dates for those associated statuses.
- Academic factors like high school, HSGPA, intended academic program, test scores (when available and considered), and any internal application or reader ratings.
- Geodemographic factors like state (or more granular measures of distance from campus), race/ethnicity, sex, and international student status,
- Financial factors like FAFSA filing status, federal methodology EFC, parent AGI, gross and unmet student need, and net cost/institutional aid.
- Special student status indicators like student-athlete, tuition benefit recipients, honors program, and legacy.
- Behavioral factors like campus visits and virtual engagement (particularly in recent and current enrollment cycles).

For external data sources, the Carnegie team utilizes a rich set of proprietary geodemographic data that supplement the individual-level data collected directly from the College. These data - alongside other third-party data available through Experian's Mosaic consumer segmentation - help define the student's context and add predictive value to our models.

# Live Dashboard

## Mid-cycle adjustments made possible through the use of a live simulation dashboard.

We include our Analytics dashboard environment for each financial aid optimization client institution. The dashboard provides a comprehensive view of current application, admission, enrollment, and financial indicators alongside comparisons to the same date in the prior two enrollment cycles, as well as final enrollment data for those cycles, and includes filter and drill-down functionality to focus on key populations. All members of the client project team have live 24/7 access to the environment. The Carnegie team will merge together institutional admission and aid data to custom-build an environment that includes a wide variety of critical indicators that assess progress toward meeting enrollment goals. A screenshot of a sample Analytics dashboard is included below.

Our team prides itself on agility during the enrollment cycle. During regular client meetings, our team will use the dashboard to monitor the developing applicant, admit, and deposit pools for risks or opportunities. If we identify a shift from our initial assumptions about student populations, we will act immediately to consider different interventions to either mitigate risk or take advantage of a key opportunity.

|                         | All Students | EMFASYS Population | International student | Extension Granted | No Extension Granted | Early Admit  | +            |
|-------------------------|--------------|--------------------|-----------------------|-------------------|----------------------|--------------|--------------|
| Year                    | 2022         | 2022               | 2022                  |                   | 2021                 | 2021         | 2021         |
| Window                  | Year to Year | Year to Year       | Year to Year          |                   | Year to Year         | Year to Year | Year to Year |
| Status                  | Applicants   | Admits             | Net deposits          |                   | Applicants           | Admits       | Net deposits |
| ▼ Enrollment            |              |                    |                       |                   |                      |              |              |
| Date                    | Apr 08, 2022 | Apr 08, 2022       | Apr 08, 2022          |                   | Apr 09, 2021         | Apr 09, 2021 | Apr 09, 2021 |
| Students                | 7,717        | ▲                  | 5,014                 | ▲                 | 451                  |              | 6,924        |
| Admits                  | 5,014        |                    |                       |                   |                      |              | 4,587        |
| Gross deposits          |              | ▲                  | 1,572                 |                   |                      |              | 261          |
| Withdrawn Deposits/Melt |              | ▲                  | 3                     |                   |                      |              | 2            |
| Net Deposits            |              | ▲                  | 451                   |                   |                      |              | 259          |
| Yield                   |              |                    | 9.0%                  |                   |                      |              | 5.6%         |
| ▼ Scores                |              |                    |                       |                   |                      |              |              |
| Avg High School GPA     | 3.48         |                    | 3.67                  |                   | 3.61                 |              | 3.47         |
| Avg Combined SAT        | 1242         |                    | 1276                  |                   | 1208                 |              | 1192         |
| Avg Index Score         | 0            | ▽                  | 0                     | ▽                 | 1                    |              | 158          |
| ▼ Population            |              |                    |                       |                   |                      |              |              |
| EMFASYS Population      | 6,964        | ▲                  | 4,553                 | ▲                 | 385                  |              | 6,358        |
| ▼                       | 7,717        | ▲                  | 5,014                 | ▲                 | 451                  |              | 4,213        |

# Financial Aid Optimization Investment Options

| Service                     | Scope of Work Summary   | Cost     |
|-----------------------------|---|----------|
| <b>FAO Renewal Option 1</b> | Utilizing institutional and third-party data on student geodemographic, academic, financial, and behavioral indicators, our team will design predictive models that assign a yield probability to each admitted student to determine the right institutional aid award. We merge our analysis with your unique institutional goals and constraints to deliver a comprehensive grant and scholarship strategy and analytics dashboard that maximizes net tuition revenue alongside key indicators like headcount, discount rate, diversity, and access for lower income students. Tier 1 includes development of a yield model, an institutional gift aid strategy, and projections of cohort outcomes. Implementation delivered via an individualized awarding strategy with customized awards for each admitted student, to be integrated into the institutional award packages. Includes a lead scoring model and regular lead tagging, first year retention modeling, strategy simulation tool, and regular tracking meetings facilitated with our Analytics Dashboard. Inclusive of regular student tagging, delivered weekly until census. <i>1 population, customized report, bi-weekly team meetings, 1 enrollment cycle (until census).</i> | \$70,000 |
| <b>FAO Renewal Option 2</b> | Utilizing institutional and third-party data on student geodemographic, academic, financial, and behavioral indicators, our team will design predictive models that assign a yield probability to each admitted student to determine the right institutional aid award. We merge our analysis with your unique institutional goals and constraints to deliver a comprehensive grant and scholarship strategy and analytics dashboard that maximizes net tuition revenue alongside key indicators like headcount, discount rate, diversity, and access for lower income students. Tier 2 includes development of a yield model, an institutional gift aid strategy, and projections of cohort outcomes. Strategy implementation provided in either matrix format or in a series of programmable rules. Includes a lead scoring model and regular lead tagging, first year retention modeling, strategy simulation tool, and regular tracking meetings facilitated with our Analytics Dashboard. <i>1 population, customized report, bi-weekly team meetings, 1 enrollment cycle (until census).</i>  | \$60,000 |

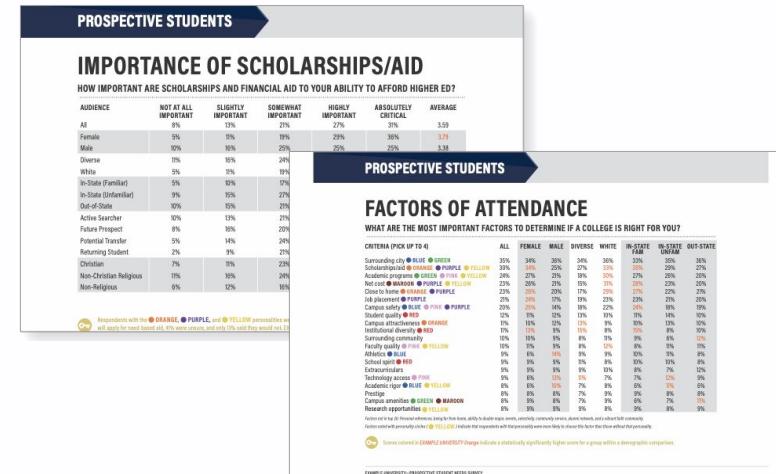
# Admitted Student Research Detail

# Admitted Student Research

Understanding student matriculation is a multi-layered process. While demographic differences tell some of the story, creating a direct conduit of feedback from those students who accepted an offer and comparing that to students who did not accept offers unparalleled insights for planning for future cycles and even retaining matriculants. Carnegie works with institutions to achieve this goal by designing, hosting, and analyzing an Admitted Student Research. With a mix of quantitative scoring metrics and qualitative open-end responses, this research adjusts to industry and student trends while creating actionable outcomes.

## What you'll gain:

- + Helps gather information about student motivation and drive to uncover what personality types your institution is serving well or turning away.
- + Additionally it covers a measure of institutional choice, financial aid needs, communication feedback, and an assessment of how well your institution met their school criteria.
- + Results are compared against their top alternative school (for those who matriculated) or the school they ultimately selected.



# Slate Communications + Portals Detail

# Slate Communications: Undergraduate Campaigns

**Control is key.** With Slate drip marketing campaigns, you're capitalizing on the power of Slate—from responsive, behavior-driven content to UTM placement and more. We'll support your application, yield, anti-melt, and stakeholder-specific communications, taking care of all the ins and outs of a complete setup and execution. Backed by years of admissions and marketing know-how, we have unparalleled knowledge of both Slate functionality and the enrollment marketing tactics that will set you up for campaign success.

# Discovery Support Strategy

Remaining innovative and strategic in your recruitment and marketing initiatives is essential to meet and exceed enrollment goals. Partnering with Carnegie not only ensures your Slate Communication campaigns are optimized using best practices from the start, but it also provides your team additional bandwidth and support.

Any developed Slate campaign will receive the following support from our team:

- + A discovery visit with our Carnegie team to align both teams with campaign goals.
- + Ongoing project and strategic support provided in the form of 30-minute calls and/or written communication

# Delivery Optimization Analysis

Carnegie creates real-time campaign reports to monitor each campaign and makes revisions, if necessary, to communications to achieve maximum performance.

Throughout the campaign duration our Slate team will provide:

- + Campaign strategy and communication plans
- + Guidance regarding communication strategy and Slate deliver best practices
- + Insight into Carnegie partner benchmarking data relative to campaign performance and overall conversions
- + Annual campaign assessment

# Name Buy Consultation

Your Enrollment Strategist will not only oversee your comprehensive Search strategy, but will be a strategic partner working alongside you through your recruitment and yield efforts. They will proactively meet with you to bring forth recommendations and discuss any changes to strategy.

## New in 2024:

- + A dedicated Enrollment Strategist, will be your **key accountability partner for all your enrollment goals** - not just those related to Student Search.
- + **Expanded Student Search list strategy & consultation** - includes assessment of historic data, growth opportunities, and market conditions - developed and delivered to work towards your prioritized enrollment goals.
- + **Inclusion of proprietary market research** through our powerful **Market Scan** study that provides you with access to rich data like household income, racial diversity, and a powerful higher ed index for opportunity identification, audience prioritization, and marketing execution.
- + Unlimited volume of names delivered through up to **twelve purchases**.
- + Configuration and integration of **College Board Connections** and subscribed services, Encoura's Smart Approach scoring and Mindsets when applicable.
- + Monthly strategy and list acquisition calls to position institution in **true year-round Search**.
- + Interpretation of results, advising, and **advancing institutional enrollment goals on an ongoing basis**, capped with End-of-Campaign reporting.

# Slate Communications Investment

| Service   | Scope of Work Summary  |
|---|--|
| <b>Name Buy Consultation</b>                        | This enrollment analysis and strategy plan will inform decision-making processes with specific recommendations relative to student search and contribute to the optimization of enrollment strategies. |
| <b>Refreshed Darted Senior Search</b>               | 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed)  |
| <b>Refreshed Darted Sophomore/Junior Search</b>     | 20 emails for up to three subpopulations (e.g., Junior, Sophomore, Freshman, etc.) (up to 5 emails segmented by Dart and up to 10 additional segments as needed)                                       |
| <b>Darted Search Landing Page</b>                   | One Darted Slate-hosted landing page portal  |
| <b>Darted/Motivator Application Generation</b>      | 15 emails (up to 5 emails segmented by Dart/Motivator and up to 10 additional segments as needed) and five text messages   |
| <b>Incomplete Application - Awaiting Submission</b> | Five emails (up to five segments total)  |
| <b>Incomplete Application - Awaiting Materials</b>  | Five emails (up to five segments total)  |
| <b>Darted/Motivator Yield</b>                       | 15 emails (up to 5 emails segmented by Dart/Motivator and up to 10 additional segments as needed) and five text messages   |
| <b>Darted/Motivator Anti-Melt</b>                   | 15 emails (up to 5 emails segmented by Dart/Motivator and up to 10 additional segments as needed) and five text messages   |
| <b>Parent / Guardian Campaign</b>                   | 15 emails for up to three subpopulations or statuses   |
| <b>Total Investment</b>                             | <b>\$177,000</b>   |

Included on following page are additional scope details.

# Undergraduate Campaigns (Refreshed and New)

## DISCOVERY, SUPPORT & STRATEGY

- Discovery Visit with Carnegie team (on-campus or virtual)\*
- Ongoing project and strategic support provided in the form of 30-minute calls and/or written communication
- Refreshed and new campaign strategy and communication plans
- Guidance regarding communication strategy and Slate Deliver best practices
- Insight into Carnegie partner benchmarking data relative to campaign performance and overall conversions
- Annual campaign assessment

## CREATIVE DELIVERABLES

- Refreshed and new copy for dynamic drip emails and text messages
  - **Senior Search:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed)
  - **Underclassmen Search:** 20 emails for up to three subpopulations (e.g., Junior, Sophomore, Freshman, etc.) (up to 5 emails segmented by Dart and up to 10 additional segments as needed)
  - **Application Generation:** 15 emails (up to 5 emails segmented by Dart/Motivator and up to 10 additional segments as needed) and five text messages
  - **Incomplete Application – Awaiting Submission:** Five emails (up to five segments total)
  - **Incomplete Application – Awaiting Materials:** Five emails (up to five segments total)
  - **Yield:** 15 emails (up to 5 emails segmented by Dart/Motivator and up to 10 additional segments as needed) and five text messages
  - **Anti Melt:** 15 emails (up to 5 emails segmented by Dart/Motivator and up to 10 additional segments as needed) and five text messages
  - **Parent / Guardian:** 15 emails for up to three subpopulations (up to 20 segments total)

## CREATIVE DELIVERABLES

- A bank of up to 12 ad-hoc emails to be used for strategic recommendations or pivots for any population with which we are communicating
- Refreshed and new design for email templates and additional email header designs
  - Two standard-style (including header, footer, and one variable CTA button) and one newsletter-style (including multi-section layouts featuring various imagery, and graphic elements)
  - Two additional email header designs per full campaign
- Refreshed and new copy and design for 6 postcard(s)
  - One postcard (up to 6x11) via Slate Print or preferred printer to be used for any population with which we are communicating (*Does not include costs associated with printing and/or postage*)

## CAMPAIN DELIVERY & ANALYSIS

- Slate Campaign Execution
  - Refreshed Population and rule configuration
  - Template import and mobile responsiveness testing
  - Email and recipient list builds
  - Refreshed Strategy and configuration for up to one form per full campaign
  - Postcard recipient list strategy and Slate Print configuration
- Refresh for One Slate-hosted Campaign Performance & Conversion Slate report per campaign
- Refresh for One Slate-hosted Funnel & Conversions Report

## SEARCH LANDING PAGE

- One Slate-hosted landing page portal segmented by Dart including:
  - One branded header image
  - One personalized greeting
  - One informative content section
  - One facts & figures content section
  - Embedding of one RFI form
  - One branded footer
- Conversion metrics included in communications reporting

# Slate Portals & Data Visualization

Your custom prospective student, current student, donor, staff member—any audience—portal will meet your exact needs and specifications. We build your portal from scratch, using web best practices like dynamic content and on-brand design. Our reporting, often delivered via a portal, is digestible and visually appealing to ensure the very best experience for every audience. We're setting the industry standard—bring us any portal or reporting project, and we'll exceed your audience's expectations.

## Parent/Guardian Portal

- One custom dataset to house parent data, including relevant dataset-scoped fields
- and prompts
- One record creation form for dataset records
- One Slate query library to define applicant statuses and populations
- Custom CSS styling, HTML, and necessary Javascript based on brand standards
- Home Page with portal elements:
  - Navigation bar
  - Welcome text
  - Application details section (e.g., start term, intended major, application status, etc.)
  - Custom checklist including all checklist sections
  - Custom payment section
  - Decision notification section
  - Contact Us section (with staff assigned or general contact info)
  - Resources section (up to 5 external links)
  - Event registration section with student's current registration and up to two event categories per population
  - One priority event call out section template

*Additional populations (e.g., International, Adult) can be added for a cost of \$5,000 per population*

### PARENT/GUARDIAN PORTAL PACKAGES AND SUPPORT

#### BASIC

- Designed to serve parents/guardians of one population (e.g. Undergraduate, Graduate, etc.)
- 20-week project duration
- Up to six project calls

**\$25,000**

### Parent/Guardian Portal Enhancements

**Portal enhancements can be added for a cost of \$1,000 per enhancement.**

- Financial aid dynamic content (using partner-provided process)
- Up to three calls to action for yield or anti-melt (up to three created)
- Up to three custom material displays (e.g., transfer credit evaluation, scholarship letters, etc.)
- Up to three test score displays
- Up to three resources/FAQ displays (not including creation of questions and/or topics)
- One custom media display
- Custom enhancement

# Digital Marketing Strategy Detail

# Pioneers of Digital Marketing Strategy

- + Subject Matter Experts: Many of our team members came from leadership roles within higher education across all divisions.
- + In-House: All execution is done by our team of 100 digital strategists giving us the flexibility to pivot throughout the year.
- + Unified Marketing & Enrollment Strategy: Our work is development to support your overall marketing and enrollment strategy. We see these efforts as once piece of the overall puzzle.
- + Insider Understanding: Our access to teams within Google, Meta, and many other channels give us access to beta products, advanced targeting, specialized reports and more.
- + Custom Solutions: Everything we've designed for you today is custom to your goals, audiences, and trajectory of your institution.

## STRATEGY OVERVIEW

**GOAL:** Increase digital visibility during critical moments of students' online college search process.

**AUDIENCES:** Prospective undergraduate students, as well as, influencers like parents of prospective students.

**STRATEGY:** We've outlined integrated digital recommendations inclusive of **Display targeting, Google Demand Generation, Meta, IP Targeting, PPC Google Ads, Carnegie Clarity, and conversion-focused paid social media strategies.** The strategy is mindful of budget and utilizes foundational strategies that insert Ithaca College at critical moments during students' online search process to drive awareness, inquiries, and application activity.

### STRATEGY HIGHLIGHTS:

- + Incorporating the always-on tactics of Display Retargeting, Meta Retargeting and Google Demand Generation Retargeting to drive application behavior for those who have visited key web pages on your site.
- + Including conversion focused age/geographic targeting to individuals under 18 years old, as well as, behavioral targeting to individuals over 18 years old to reach prospective undergraduate students and parents in priority states/DMA markets from FY'23, segmented by Darts.
- + Ensuring Metro DMV area targeting is also incorporated into overall spend for Meta.
- + Utilizing IP Targeting to a list of 14,000 hot inquiries / prospects (segmented by Dart) to promote early action and regular decision application deadlines.
  - + Expanding to list size of 20,000 in Dec/Jan.
- + IP Targeting of a list of 8,550 admitted students (segmented by Dart) to promote awareness of the deposit deadline.
- + Leveraging PPC to generate inquiries from mid-funnel users who are actively searching your keywords
- + Utilizing Snapchat and TikTok to generate both awareness and inquiries for your priority programs.
- + Create a personalized experience for users on your website in real time based on their area of interest and position in the enrollment funnel utilizing Carnegie Clarity™

### RECOMMENDED ADDITIONAL SCOPE:

- + Leveraging Google Analytics Consulting to meet your institution's needs which may include implementing recommendations from an assessment, audit existing goals and rectify any issues.

Ithaca College - Undergraduate - 2024- 2025 - Digital Renewal Note: These recommendations are fully scalable and adjustable to fit any budget or goals.

# About Carnegie

# The Power of Human Connection.

**We believe that genuine connection is the key to capturing attention and building relationships.**

Our core philosophy fuses the principles of psychology with marketing and enrollment innovation. The technical term for this is psychometrics. We think of it as empathy.

By measuring a student's unique behaviors and motivators and marketing to those needs and expectations, we help our client to create real conversations ... one student at a time.

Human Connection leads to action, enrollment, retention, and lasting affinity.



# Carnegie at a Glance

For more than 35 years, Carnegie has been a leader and innovator in higher education marketing and enrollment strategy, offering groundbreaking services in the areas of Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Financial Aid Optimization, Website Development, and Creative that generate authentic connections.

## ● Higher Education Marketing and Enrollment Strategy

Carnegie is the future of higher education marketing and enrollment strategy, and has been since 1985.

## ● The Power of Human Connection

We connect colleges with students through the power of human connection. We believe that genuine connection is the key to capturing attention and building affinity. We measure and then market to a student's unique behaviors and motivators to create deep connections and real conversations

## ● Custom Solutions

Carnegie builds custom solutions with best-in-every-class services in Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Financial Aid Optimization, Web Development and Creative that generate student connection. Our approach is data driven, personalized, targeted, and customized to solve our clients' unique enrollment needs and challenges.

## ● Integrated Services for Marketing and Enrollment

We deliver what others simply cannot because we have what others do not: original intellectual property, powerful data, precision tools, and decades of market leadership experience.

# 1985

The year our company was founded

# 41

The number of states that we call home

# 341

The number of Carnegie team members across the country

# 12

The number of higher education organizations we partner with annually including NACAC, NAGAP, UPCEA and more

# 11

The number of custom research white papers released over the last year

# 700

The number of institutions we've partnered with over the last year

# 3

The number of major conferences that we host every year

# 3

Top archetypes represented in our team: Provider, Explorer, Competitor

# 25

The number of major conferences we present at annually

# Comprehensive Services

We can meet you wherever you are in your journey. Consider our team an extension of your own — focused on your needs, dedicated to your success.



## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.



## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.



## ENROLLMENT STRATEGY

Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.



## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.



## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.



## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.



## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.



## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.



## SIGNATURE CREATIVE

By defining what sets you apart and by learning what will speak to your audiences, we create impactful messaging that builds reputation and forges powerful connections.



## SLATE OPTIMIZATION

Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.



## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.



## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.

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# CARNEGIE

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[info@carnegiehighered.com](mailto:info@carnegiehighered.com)

# Colorado State University Pueblo

PROPOSAL

## Enrollment Marketing Services



Enrollment Marketing Proposal prepared for CSU Pueblo RFP24-00003

May 2024



CARNEGIE

Lee Saunders, Executive Director of Admissions

Dear Lee:

**Thank you for the opportunity to submit a proposal for Enrollment Marketing Services.**

This is a pivotal opportunity to fundamentally change the way that you think about CSU Pueblo's Student Search. From your RFP and our conversations, we believe that we're uniquely positioned to partner with you on this transformation.

Working with Carnegie, you'll have a partner who is invested in your success and understands what makes you, you. We look forward to becoming an extension of your team. CSU Pueblo is unique, be it your military-friendly campus, your on-campus radio station, your Thunderwolf community, your Vision 2028 guiding principles, and of course, your Pueblo chiles. We recognize that our engagement must be unique too, custom, and authentic to CSU Pueblo.

We need to meet prospective students where they are, with messaging that speaks to who they are in order to increase engagement and drive action. We look forward to helping you generate authentic connection. From our conversation we understand that you need to:

- + Grow new student enrollments over the next few years through a stronger pool and more yield-focused strategies to increase conversions through the funnel.
- + Focus on increasing enrollment for your incoming class to ~1,150 students across all student types.
- + Integrate data within your Slate instance.
- + Maintain and enhance the geographic, socioeconomic, and programmatic diversity of your inquiry and applicant pools, especially rural communities, Hispanic/Latino, and first-generation students from across the state and region.
- + Reach prospective students earlier in the college selection process.

Together we will tackle these goals head on, starting with market research. We'll dive into your previous enrollment performance and make surgical recommendations on market penetration efforts in current markets and identify new areas to strength both your short and long term pipeline. We'll recommend new always-on lead sources to get in front of students earlier in their process and evaluate past source performance and score your prospect pool to identify students with the greatest propensity to take action to ensure your maximizing your time and energy for enrollment success.

Together we will also embrace a philosophy that leverages the power of human connection to generate affinity and turn affinity into action.

This proposal was custom built for CSU Pueblo and contains strategies that will support your enrollment goals. We hope this proposal will serve as a springboard for additional conversation and collaboration—we'd love to finalize this strategy together.

We look forward to a future conversation when we can share our excitement for the potential of this partnership and are ready to start on, or before, July 1, 2024.

Go T-Wolves!  
Nicole



Nicole Vilegi-Sandage  
Director of Client Success

# Table of Contents

Our mission is to help our clients understand who they are, who their audiences are, and how to forge powerful and enduring relationships. We offer a comprehensive and integrated portfolio of services that generate results for whatever challenges you may face. We invented our proprietary methods and tools because nothing like them existed in the marketplace to provide solutions.

Our talented force of strategic thinkers are passionate about your triumphs. We stack your deck by employing industry leaders and insiders who not only love to succeed but also love to help you change the game. This is how we earn your trust as an invaluable strategic partner.



|  |    |
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# Introduction & Histories

# Carnegie's Innovative History



For more than 35 years, Carnegie has been recognized as a leader and innovator in higher education marketing and enrollment strategy, and we've undergone thoughtful, and strategic growth to support the **future of higher education.**

# Comprehensive Services

We can meet you wherever you are in your journey. Consider our team an extension of CSU Pueblo – focused on your needs, dedicated to your success.

## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.

## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.

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Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.

## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.

## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.

## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.

## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.

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Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.

## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.

## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.

### Examples of Previous Work & Case Studies

# Our Proposed Approach

# Yield-focused Approach to Student Search

Our Student Search is counter to the traditional high-volume, low-conversion Student Search of the past. Your enrollment solution will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals. With yield as our ultimate measure of success, **we focus on increasing engagement and conversions at each stage in the enrollment journey**, from prospect to deposited student.

**A collaborative partnership focused on yield.**

## *Tip the scale*

**Recruit with purpose** by using market research to inform prospect acquisition and predictive modeling to identify those with greater propensity to take action.

## *Use personality to personalize*

**Capture attention and build connection** with your prospects through psychometric segmentation and research-backed creative.

## *Campaigns should be agile*

**Drive engagement** with precision digital advertising and dynamic email communications, that are monitored for performance and optimized to meet your enrollment goals.

## *Data should be owned and available*

**Gain a competitive edge** with real-time reporting and automatic ownership of every record sourced.

## *Resources should be used efficiently*

**Leverage predictive and actionable data sets** to spend your time and money where it matters most.

## *Your Student Search should be custom crafted*

**Pair your institutional knowledge with our best-in-class services** for the exact solution you need today, and know that we are already building the solution of tomorrow.

## *It's more than "Search"*

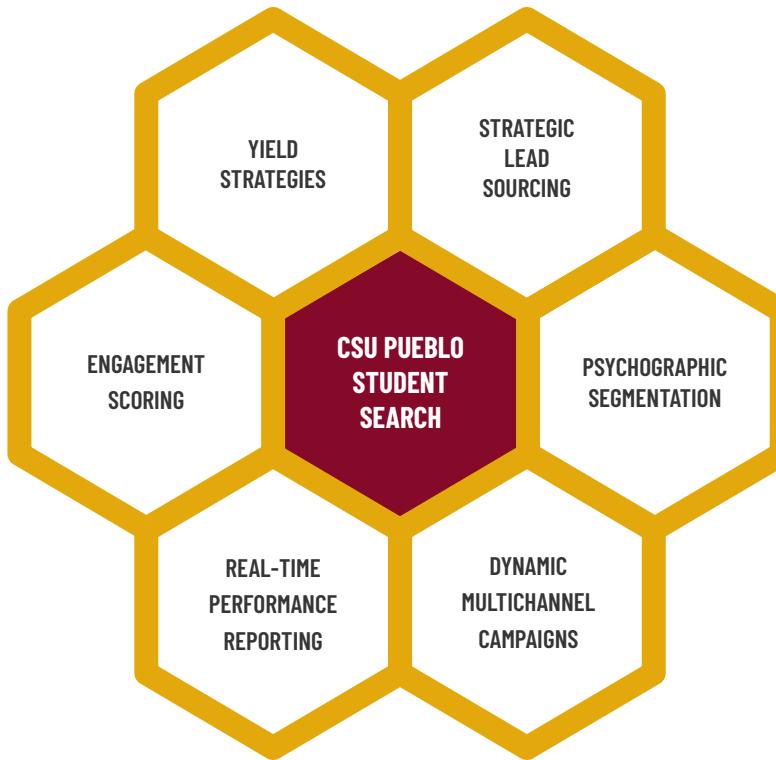
Enrollment management today is so much more than search response and application generation. **This Student Search is the marriage of smart enrollment and marketing strategies.** We include yield drivers like financial aid strategy and yield campaigns. We support the full enrollment journey, to support your enrollment aspirations, by increasing engagement and conversions, and ultimately yielding your class.

# Tailored, Not Templatized

We offer a full enrollment life-cycle solution purpose-built for today's higher education landscape.

A Carnegie Student Search has six core features, as illustrated on the right. We think of these as buildable components that when implemented together will maximize the potential of your Student Search.

The strategies within these features integrate to create exponential impact on engagement, conversions, and ultimately enrollment. Together we will build a custom solution that will answer your most pressing marketing and enrollment needs.



Based on our discovery conversation, we recommend a custom combination of strategies from each of the above pillars. We'll lean heavily in to strategic lead sourcing, psychographic segmentation, dynamic campaigns, layer in lead scoring which is part of our engagement score and anti-melt and yield email campaigns to deliver full student lifecycle support.

# Enrollment & Lead Sourcing Strategy

We're going to set you up for short and long term success by leading with data to build a sustainable pipeline. Your Enrollment Strategist will lead you through a diversified sourcing strategy considering past enrollment data and new market research that we will conduct for you. This will inform your name purchase and ensure that your selections are aligned with your goals. We're also recommending an always-on lead strategy to get in front of prospects sooner. Next, we'll score your prospect pool to identify individuals with the greatest propensity to take action, so you can maximize your time and resources.

## Our recommendations for Colorado State University Pueblo include:

### + Enrollment Strategy Consulting

- + A dedicated Enrollment Strategist will be your key collaborative partner

### + Strategic Name Buy

- + Comprehensive Sourcing using enrollment data, market research, and channel analysis
- + Strategy based on Regional and National Trends
- + Unlimited volume of names delivered through up to twelve purchases
- + Configuration and integration of College Board Connections and subscribed services, Encoura's Smart Approach scoring and Mindsets, when applicable

### + Lead Scoring

- + Assign a probability of application to each student in your prospect pool
- + Use this rich data to make resource allocation decisions
- + Inform communication segmentation

### + Student Database Access

- + Early pipeline lead delivery
- + Unlimited lead delivery (*averaging ~14% first source contribution to enrolled classes*)

### + Market Opportunity Index

- + Proprietary market research that provides you with access to rich data like household income, racial diversity
- + Powerful higher ed index for market identification to bolster your pipeline

# Psychographic Segmentation

Student personas are truly game-changing when it comes to capturing attention and building affinity with students. This is how we are going to increase engagement and conversions through the student journey—by getting to know your student better than the competition, and delivering messaging that inspires action.

## Our recommendation for Colorado State University Pueblo includes:

- + **Custom Psychographic Segmentation - National Student Profiles**
  - + Deliver truly personalized communications with Psychometric segmentation—only found at Carnegie
  - + Tagged with 3 National, turn-key profiles, your names are ready for segmentation
  - + Lean on our creative team to write and design communications personalized with your student Motivators
  - + Integrated into your CRM, Motivator profiles offer sophisticated yet simple reporting and communication segmentation
- + **Personalized Creative**
  - + Inclusive of digital and email communications
  - + Designed with National Student Profiles (Motivators) in mind



# Dynamic Multi-channel Campaigns

## Your Campaigns

- + Senior Search: 15 emails; up to 20 segments
- + Underclassman Search: 20 emails; 3 subpopulations; up to 20 segments
- + Search Landing Page: One Slate-hosted landing page portal
- + Application Generation: 15 emails (up to 20 segments total) and five text messages
- + Transfer Search: 5 emails; 2 segments
- + Yield Campaign: 15 emails; up to 20 segments
- + Parent/Guardian Campaign: 15 emails for up to three subpopulations or statuses

**Our recommendation for Colorado State University Pueblo includes:**

**+ Full Lifecycle Slate Communications**

- + Deliver a unified experience from prospect to enrolled student, with email campaigns designed for your student personas (Motivators)

**+ List-based Digital Strategy**

- + Leverage precise targeting, at home and on mobile devices
- + Present a unified brand experience across digital, email, and print
- + Real-time inquiry tracking in your CRM

**+ Reporting + Consultation**

- + Slate configured and hosted reporting
- + 24/7 direct access to reporting dashboard
- + Continuous optimization during engagement
- + Engagement and conversion tracking within Slate
- + Ongoing analysis of programs, including virtual bi-weekly reviews



Technolutions' first Slate Platinum Preferred Partner

# Website Attribution & Personalization



We can give you full student journey data, from the very first touchpoint to application and beyond. From digital campaigns to Student Search emails, through to deposit submission, we track and report on each user's unique digital journey.

We use this powerful intel to create a personalized website experience for each site visitor—based on their behaviors, interests, and position in the pipeline. We will help you create and deliver custom web content for an onsite experience that will meet student expectations and drive action.

The tool is called Carnegie Clarity, named for the data transparency it provides. With Carnegie Clarity you have the power to engage stealth prospects, deliver meaningful messages at milestone moments, and truly understand your Student Search ROI.

## BENEFITS OF CARNEGIE STUDENT SEARCH:

- ⊕ See full lifecycle tracking and attribution in your Slate instance for ROI reporting
- ⊕ Collect rich behavioral data to optimize the student experience
- ⊕ Lean on our team for personalized on-site creative and delivery
- ⊕ Track all digital campaigns in your Slate instance

# Investment Summary

## Core Student Search Investment

### CollegeXpress Lead Generation

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

### Name Buy Consultation

Delivering a name-buy recommendation and diversified sourcing strategy based on your enrollment data, market research, and channel analysis to ensure that your selections are precise and have the highest likelihood of conversion.

### Inquiry + Application Generation , Yield Support, and Parent Communication (Slate Comms)

Tailoring your Slate communications based on academic, demographic, psychometric, and custom data points and generating connections with highly relevant messages. No data transfers involved and real-time campaign reporting is built in.

\$187,600

### Psychographic Segmentation: Carnegie Motivators

Combining student demographic and psychographic data—like personalities, motivations, and beliefs—we deliver custom audience segmentation and student profiles “motivators” that ensure your Student Search campaigns capture attention, increase engagement, and create affinity.

### Lead Scoring

Custom modeling predicting inquiry-to-applicant conversion to inform your team's outreach priorities. Inclusive of regular tagging of current inquiries to signal likelihood to convert, delivered weekly until census.

## Website Tracking & Digital Marketing Investment

### Website Personalization and Attribution

Carnegie Clarity™ is an innovative marketing attribution tool that provides never-before-seen depth of insight into enrollment data and leverages it to create personalized website experiences based on the interests and actions of your users. We will help you create and deliver custom web content for an onsite experience that will meet student expectations and drive action.

\$49,190

### List-Based Digital Marketing

Strategy, execution, and management of all paid digital media. Set up across all digital platforms including keyword research, creation of target audiences, development of all copy and ad text, including testing variations, bidding strategies, etc. Access to a live dashboard to monitor digital campaigns as well as ongoing analysis from Digital team, including performance insights, trends, and recommendations when applicable.

\$62,500

### Total Investment - One Year

\$299,290

# Multi-year Discounts

We want to be your partner in helping you meet your enrollment goals, for us this means being invested and working together with you. We know we have great success when we have more time to work alongside you to refine things, as such, we have created these multi-year options for you. We have included the cost of our search solution, estimated print costs, and proposed digital advertising costs. Your Student Search solution is scalable based on further conversation and we look forward to building this solution together.

| Multi-year Partnership                               | Core Student Search Investment | Website Tracking     | Proposed Digital Costs | Total                 |
|--|--------------------------------|----------------------|------------------------|-----------------------|
| Total Annual Investment<br><b>1 Year Partnership</b> | <b>\$187,600</b>               | <b>\$49,190</b>      | <b>\$62,500</b>        | <b>\$299,290</b>      |
| Total Annual Investment<br><b>2 Year Partnership</b> | <b>\$180,625/year</b>          | <b>\$49,190/year</b> | <b>\$62,500/year</b>   | <b>\$292,315/year</b> |
| Total Annual Investment<br><b>3 Year Partnership</b> | <b>\$175,700/year</b>          | <b>\$49,190/year</b> | <b>\$62,500/year</b>   | <b>\$287,390/year</b> |

# Our Proposed Process



## DISCOVER

In discovery, we'll review project goals, timelines, and dive into your brand voice, data set-up, and more.



## STRATEGIZE

We'll derive insight from the Discovery process and create a custom, tailored Student Search Strategy for you.



## ACTIVATE

We'll produce persona driven creative assets and then deploy them throughout your enrollment ecosystem.



## MEASURE

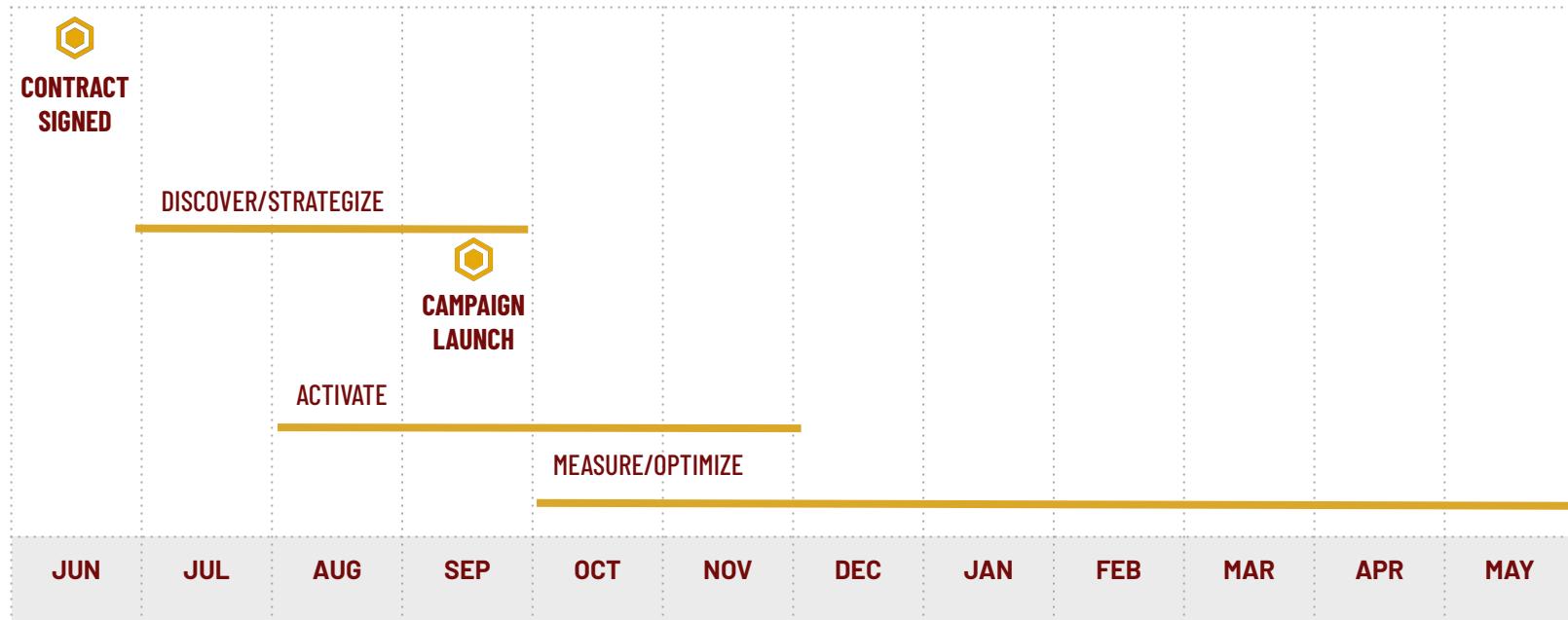
After deployment we'll provide you with regular reports and recommendations for campaigns in flight.



## OPTIMIZE

Iterative improvement is essential to maximizing your efforts over time. We will provide ongoing consultation.

# Carnegie Student Search Timeline



# Organization & Financial Capacities

Carnegie currently serves 600+ clients and assigns team members based on fit and bandwidth. We are happy to provide additional financial capacity information if needed.

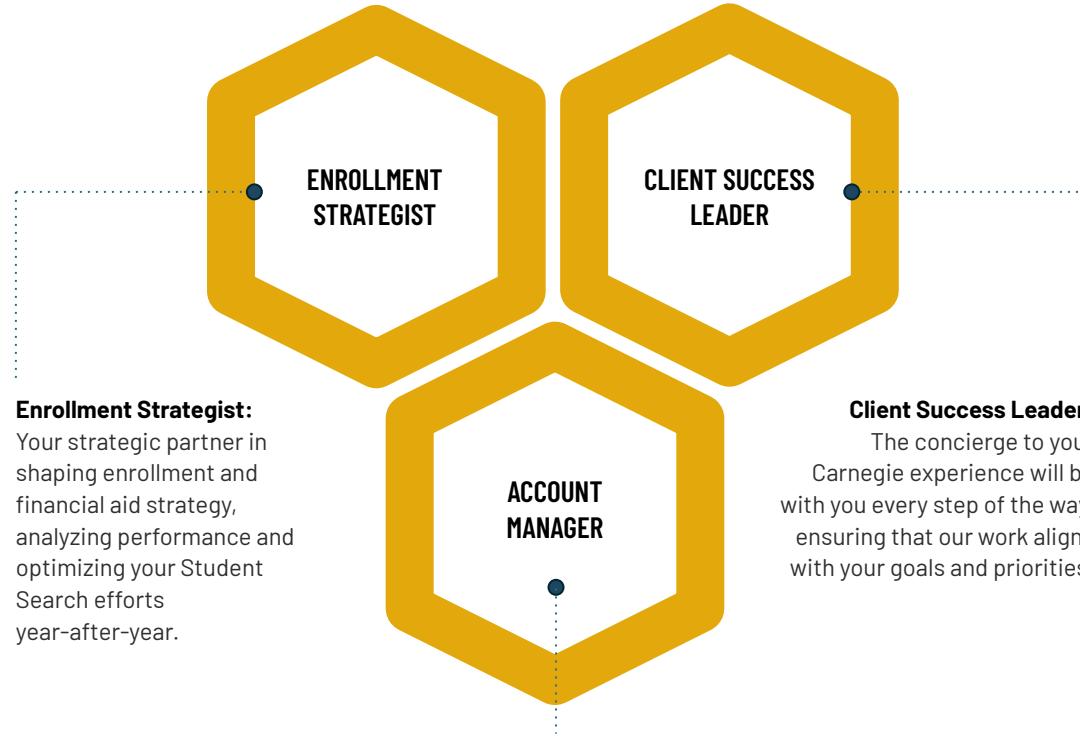
# Essential Relationships

Your core team at Carnegie will include the Enrollment Strategist, Client Success Leader, and Account Manager.

## Deep bench of expertise

**Of course, you'll also have a team of experts working on your campaigns and directly accessible to you throughout our partnership.**

Seasoned Digital and CRM strategists, world-class graphic designers and writers, Web experts, and Financial Aid analysts all will be on your team to ensure success.



### **Enrollment Strategist:**

Your strategic partner in shaping enrollment and financial aid strategy, analyzing performance and optimizing your Student Search efforts year-after-year.

### **Client Success Leader:**

The concierge to your Carnegie experience will be with you every step of the way, ensuring that our work aligns with your goals and priorities.

### **ACCOUNT MANAGER**

**Account Manager:** Comprehensive partnerships require meticulous attention to detail and process. Your Account Manager will ensure smooth communication and adherence to established timelines.



**Mike Matthews**  
EVP, Enrollment & Data Services

**Persona**  
The Attentive and Analytical Theorist



Mike Matthews is the Executive Vice President of Enrollment & Data Services overseeing Carnegie's non-Slate delivery and strategy team. Before joining Carnegie, Mike led enrollment services at Fire Engine RED and was the Director of Student Search Service at the College Board. Mike has worked in higher education for 25 years.



**Alexa Poulin**  
Chief Digital Officer

**Persona**  
The Humorous and Assertive Champion



Alexa Poulin manages the daily operations of Carnegie's leading-edge Digital marketing team. She understands the complexities of recruitment and enrollment marketing challenges, as a former collegiate director of marketing with more than 20 years of student-facing marketing experience. Alexa also serves as a board member of the American Marketing Association, working alongside colleagues to plan and execute AMA's annual Higher Ed Symposium.



**Ian Strawn**  
VP, Creative

**Persona**  
The Wise and Compassionate Impresario



A former worldwide exhibiting fine artist, Ian Strawn now plies his creative talents in the oversight of Carnegie's multimedia designers, producers, directors, artists, and technicians. A graduate of Brigham Young University, Ian is now a 15-year veteran of the creative marketplace. He has served in the capacity of designer, strategist, marketing director, art director, creative director, and start-up entrepreneur. Ian applies a unique mix of both creative thinking and analytical strategy, pushing each project to the most on-brand outcome.



**Katie Sentissi**  
VP, Digital Strategy

**Persona**  
The Adventurous and Enthusiastic Dynamo



As AVP of Digital Strategy, Katie collaborates with clients to create comprehensive digital advertising campaigns that are aligned with each institution's objectives and enrollment goals. She has worked in digital marketing for more than nine years and specializes in innovative digital marketing strategies, strategic campaign development across paid search, display, social media, and streaming services. Her vital role as a liaison between the client and the Digital team provides a seamless process, from campaign implementation to optimization and analysis..



**Jess Severt**  
VP of Slate Student Search and Communications

**Persona**  
The Compassionate and Curious Seek



Jess oversees Carnegie's Slate Communications team, setting up and executing application, yield, anti-melt, and stakeholder-specific communications for clients. Jess joined Carnegie with experience in marketing and communications and admissions at Ball State University. She holds degrees in telecommunications and executive development for public service.



**Mike Keane**  
SVP, Modeling + Client Strategy

**Persona**  
The Influential and Resilient Energizer



Mike leads modeling projects for clients, provides financial aid policy and operations expertise, and advises on a range of topics within enrollment management. Previously, Mike served as the Assistant Vice Provost for Financial Aid at Loyola Marymount University, where he led a financial aid team of more than 20 staff members and oversaw an aid portfolio exceeding \$240 million. Mike has 12+ years of experience in enrollment data collection, analysis, and reporting. Mike has a Ph.D. in Political Science from the University of Notre Dame and a B.A. in History and Latin from Loyola Marymount University.

# Examples of Work

Find out how we help colleges and universities connect with the right students, at the right time, with messaging that speaks directly to who they are as individuals with more case studies on [our website](#).

# Gettysburg College

**“Student Search through Carnegie gives us consistency of message, creativity, flexibility, and knowledge of best practices and insights about what’s working and what’s not. We love that everything is in Slate, and while we have plans outlined, we can also pivot and adapt when needed.”**

**Gail Sweezey**

Dean of Admissions,  
Gettysburg College

When Gettysburg College needed a marketing and enrollment strategy partner to mobilize its strategic plan for enrollment success, they looked to Carnegie.

## ⊕ The Strategy

Gettysburg, a long-time partner of Carnegie, knew that to be competitive in their marketplace, they needed to better understand their market and how best to communicate the value of a Gettysburg education. Gettysburg's enrollment and marketing leadership came to Carnegie with a new strategic plan and some new ideas about how they might connect with prospective students—but they wanted to test their plan in the market.

Together, Carnegie and Gettysburg rolled out a custom research project comparing Gettysburg's standing amongst its competitors. This project provided invaluable insights into the themes and messages that would not only attract students but also distinguish Gettysburg from the competition. With these findings, Gettysburg launched a new messaging campaign in December of 2022.

To broaden its reach and make a lasting impression, Gettysburg expanded its paid digital strategy to include a blend of SEO, PPC, IP Targeting, and social media platforms, including Facebook, Instagram, Snapchat, YouTube, and OTT into its marketing mix. The implementation of GA4 and Carnegie Clarity played a critical role in this phase, ensuring optimal investment returns through precise measurement, attribution, and enhanced on-site personalization. This holistic digital strategy paid off, with a remarkable 86% increase in new site visitors, 69% of which were directly attributed to Carnegie-Gettysburg campaigns.

A key component of Gettysburg and Carnegie's multi-layered marketing + enrollment strategy was the focus on inquiry acquisition through CollegeXpress, Carnegie's student database and lead generation platform. This initiative proved successful, with 15% of Gettysburg's admitted students and 9% of those who deposited being sourced through CollegeXpress. Further integrating their strategy, Carnegie leveraged Gettysburg's Slate instance to launch Sophomore, Junior, and Senior Student Search communications. Carnegie's Slate team designed Slate communications campaigns in the client's instance, giving Gettysburg real-time insights into campaign performance and rich behavioral data about their potential incoming class.

This integrated marketing and enrollment effort helped Gettysburg achieve its 2023 enrollment goals.

## + The Results

Carnegie's partnership helped Gettysburg reach and engage its prospective student audience, as demonstrated by digital, communications, and inquiry-sourcing outcomes. Overall Gettysburg saw a 4% increase in YOY inquiries, a 23% increase in submitted applications YOY, and a 3% increase in admits YOY. Gettysburg also saw an 86% increase in new website visitors, with 69% of website traffic through marketing campaigns attributed to Carnegie.

CollegeXpress generated strong engagement as demonstrated by its role in Gettysburg's inquiry pool, with CollegeXpress leads making up 15% of admit/matrics, and 9% of deposits pending for Fall 2023.

**4%**

increase in YOY inquiries

**23%**

increase in submitted applications YOY

**3%**

increase in admits YOY

**86%**

increase in new website visitors

**15%**

admit/matrics sourced via CollegeXpress

# Cleveland State University

**“The team at Carnegie really took the time to get to know our institution, our leadership, and our students—and to develop campaigns that spoke to what was distinctive about Cleveland State. Yield on our Carnegie-designed campaigns was almost double our yield on all other sources.”**

**Jonathan Wehner**

Vice President and Dean of Admissions  
Cleveland State University

When Cleveland State University needed to grow in a competitive environment and redefine its Student Search strategy, enrollment leadership turned to Carnegie for a strategic and personalized approach. In a crowded landscape, the University had a compelling story that was not being communicated successfully. External market perception did not align with that of internal stakeholders, and previous Student Search strategies had not driven conversions.

## ⊕ The Strategy

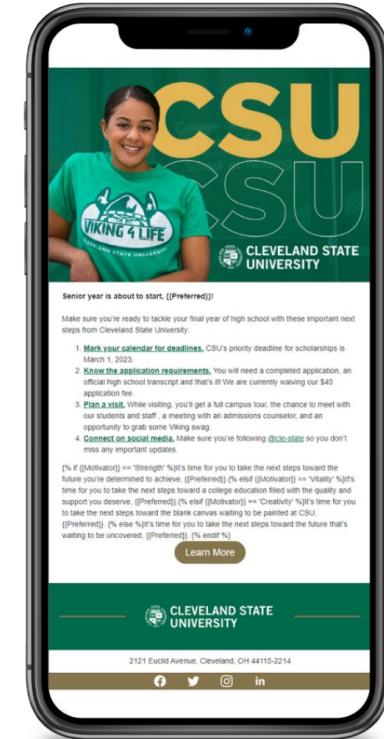
The Cleveland State University-Carnegie partnership started with a consensus-building brand strategy engagement to guide market differentiation. Hundreds of stakeholders were involved in the brand building process. The University's competitive set and perception in the external market were also analyzed. From this data, Carnegie recommended the University implement a bolder expression of its hardworking and empowering personality, which was both authentic to the University, and distinct in its competitive set. As a next step, Carnegie and CSU launched digital campaigns focused on brand awareness and lead generation, followed by a Slate-integrated Student Search to generate qualified leads and applications and prevent melt. Carnegie also developed custom psychographic audience segments specific to CSU's student body to equip CSU for even more targeted communication.

## ⊕ The Results

Cleveland State's recent enrollment results demonstrate the value of a personalized and specific Student Search strategy. In the first year of the partnership, starting mid-cycle, applications generated by Carnegie yielded to enrollment at a 30% rate, relative to an overall rate of 16%. The University continues to work with Carnegie as a trusted enrollment marketing partner.

# 30%

Yield rate on Carnegie-generated applications, versus an overall rate of 16%



# Summary

Our proposal for CSU Pueblo is about much more than traditional Student Search. Together, we will increase engagement and conversions at each stage in the enrollment journey.

You recognize in your RFP that in order to serve students, empower educators, and elevate your community, you must be dedicated to change. This resonates with our team and we are confident our approach will position you as leaders in the space.

## A summary of our approach:

- + Enrollment & Lead Sourcing Strategy
- + Psychographic Segmentation
- + Dynamic Multi-channel Campaigns
- + Website Attribution & Personalization
- + Real-time Performance Reporting

We are thrilled at the opportunity to partner with you with the work we've proposed, and invite further discovery and conversation to ensure this plan aligns with your vision.

# References & Required Forms

# References

## Jenny Sawyer

Associate Provost and Executive  
Director of Admissions

**The University of Louisville**  
2301 South 3rd Street  
Louisville, KY 40292

502.852.4957  
[jenny.sawyer@louisville.edu](mailto:jenny.sawyer@louisville.edu)

### Scope of Work:

Our partnership with the University Louisville includes Slate Student Search, Digital Marketing, Admitted Student Research, and CollegeXpress lead generation.

## Jason Black

Vice President for Enrollment  
Management

**Samford University**  
800 Lakeshore Drive  
Birmingham, AL 35229

205.936.2441  
[jjblack@samford.edu](mailto:jjblack@samford.edu)

### Scope of Work:

Over several years, our work with Samford has spanned our full creative portfolio of services, including Brand Personality, Athletics Logo Development, Institution Logo Development, Creative Blitzes, Campaign Development, Print Collateral, Digital Content, Photography, Microsites, and Student Search Campaign Emails.

## Alejandra C. Sosa Pieroni

Executive Vice President, Enrollment,  
Marketing, and Student Success

**Georgia Southern University**  
1332 Southern Drive  
Statesboro, GA 30458

513.635.8409  
[asosapieroni@georgiasouthern.edu](mailto:asosapieroni@georgiasouthern.edu)

### Scope of Work:

Georgia Southern University works with Carnegie as a full-service integrated partner. Our scope of work has included, but is not limited to, web consultation, digital marketing, brand personality and creative, Slate consultation and communications, Slate Reporting, and Slate portals.

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# CARNEGIE

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[info@carnegiehighered.com](mailto:info@carnegiehighered.com)

# Drake University

Website Redesign



May 2024

**Leslie Maynes**  
**Drake University**  
**Communications & Marketing**  
2507 University Ave  
Des Moines, IA 50311

***“We wanted our website to come to life and to take visitors on a journey.”***

**Danita Knight**  
Former Vice President for Communications and Marketing  
Agnes Scott College

## Hello, Drake!

And thank you for inviting us to submit a proposal for your website redesign project.

57% of graduating seniors in our most recent national college-search survey shared that an institution's website was the number one location to find information on a school. You have three seconds to make an impression and showcase content that is relevant to them until our antsy Gen Zers leave and never come back. Three seconds.

Our comprehensive audit of Drake's site has revealed areas for improvement, with nearly 3,000 error messages, close to 6,000 warnings, and over 1,000 redirects. Rest assured, our team is poised to address these challenges head-on, leveraging our deep bench of team members and expertise in web development and optimization to ensure a seamless user experience across all touchpoints.

Having been over 5 years since the last time Drake completed a full website audit and redesign, now is the time to answer your virtual front door for all audiences. We have had the privilege of working closely with Drake, including the successful completion of your updated messaging platform, we are intimately familiar with Drake's values, aspirations, and unique identity.

At the heart of our proposal lies a deep understanding of the symbiotic relationship between Drake University and the vibrant city of Des Moines. We recognize the potential to further amplify what makes the Drake experience special, from the exhilarating Drake Relays to the colorful tradition of Drake's Painted Street, and the enduring spirit of becoming a lifelong Bulldog. We are committed to putting these cherished traditions at the forefront of your immersive digital environment in a way that resonates with current and prospective students, alumni, faculty, and staff alike.

We'd love to expand our partnership with you, and we can make several promises about how we'll approach the engagement – and the results of our process:

**Your new site will be grounded in our best-in-class strategic foundation.**

We'll find ways to tell Drake's story as only you can. Your people, your programs, your place, and ultimately your promise. And if we may add another "P", your pooch Griff! Our work will focus on what your audiences expect – based on our experience designing websites for hundreds of other education institutions, and the research we'll conduct with your community and your stakeholders.

**It will be beautiful, modular, and flexible.** We'll explore multiple creative concepts with you, leverage Drake's forthcoming "Open" campaign, and develop a system of layouts and design components geared toward higher ed marketers and communicators. We'll convert the design to framework-free and performant front-end code and ensure a well built and long-lasting CMS implementation.

**Your new site will get results.** It will be search engine optimized, mobile native, fast loading, and highly accessible. It will amplify your brand, communicate Drake's core values, and connect with prospective students and other primary audiences. It will engage and delight visitors across all devices.

**You'll get a site that's built to last.** We'll right-size our recommendations and approach to fit your team and your governance model. We'll partner with you for a solid and well communicated launch. We'll refine your governance to position you for long-term success and avoid future content sprawl and degradation of site health. Your team will be empowered to evolve and improve the site over time.

**And equally important, you'll get a bona fide partner.** We're transparent, innately curious, and flexible in our approach. We will build upon work already been completed in our partnership – knowing the bold Drake messaging strategy, who your competitors are, and what makes Drake unique.

Hopefully, this proposal will serve as a springboard for additional conversation and collaboration – we'd love to tailor our approach to Drake's, and Griff's, needs.

**Now, let's go!**

**Kelsey Anderson**

VP, Client Success

[kanderson@carnegiehighered.com](mailto:kanderson@carnegiehighered.com)

651.353.7821

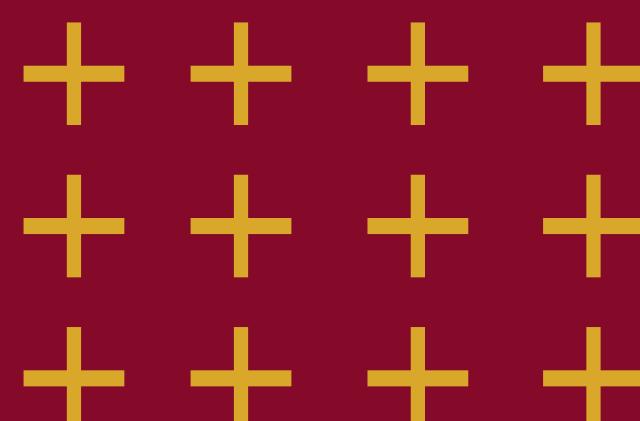
**Bill McLaughlin**

EVP, Web

[bmclaughlin@carnegiehighered.com](mailto:bmclaughlin@carnegiehighered.com)

314.527.2178

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# About Carnegie



## The power of human connection

### Higher Education Marketing and Enrollment Strategy

For more than 35 years, Carnegie has been a leader and innovator in higher education marketing and enrollment strategy, offering groundbreaking services in the areas of Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Website Development, and Creative that generate authentic connections.

We connect colleges with students through the power of human connection. We believe that genuine connection is the key to capturing attention and building affinity. Our core philosophy fuses the principles of human psychology with marketing and enrollment innovation; we measure and then market to a student's unique behaviors and motivators to create deep connection and real conversation.

This leads to action, enrollment, retention, and lasting affinity.

**600 +**

College and university partners

**35 +**

Years of Higher Education experience

# best in class

## Our Solutions, Your Success

Whether you need to optimize digital strategies or build a brand strategy from the ground up, Carnegie provides you with single-source access to custom solutions built from our best-in-class services. We'll deliver the results you're after, time and time again.

We deliver what others simply cannot because we have what others do not: original intellectual property, powerful data, precision tools, and decades of market leadership experience.

- + Brand Strategy
- + Digital Marketing
- + Enrollment Strategy
- + Integrated Research
- + Lead Generation
- + Marketing Strategy
- + Personality Assessments
- + Signature Creative
- + Slate Optimization
- + Student Search
- + Web Development

**mStoner joined Carnegie in October 2021 to pursue our shared goal of being the most transformative marketing and enrollment solution in higher education.**

For 20 years, mStoner operated as an independent boutique web agency with headquarters in Chicago and a distributed team spanning the country. mStoner collaborated with more than 350 colleges and universities, launching more than 250 websites.

As the Web Team at Carnegie, we bring an unmatched understanding of the strategic goals and challenges of higher education institutions and we are adept at managing the organizational and communication complexities of campus-wide website projects.

**350+**

Collaborations with colleges  
and universities

**250+**

Websites launched since 2001

We create thoughtful, experiential,  
simple, human experiences that  
engage and delight. Our design  
work has won more than 100  
awards over the last five years.

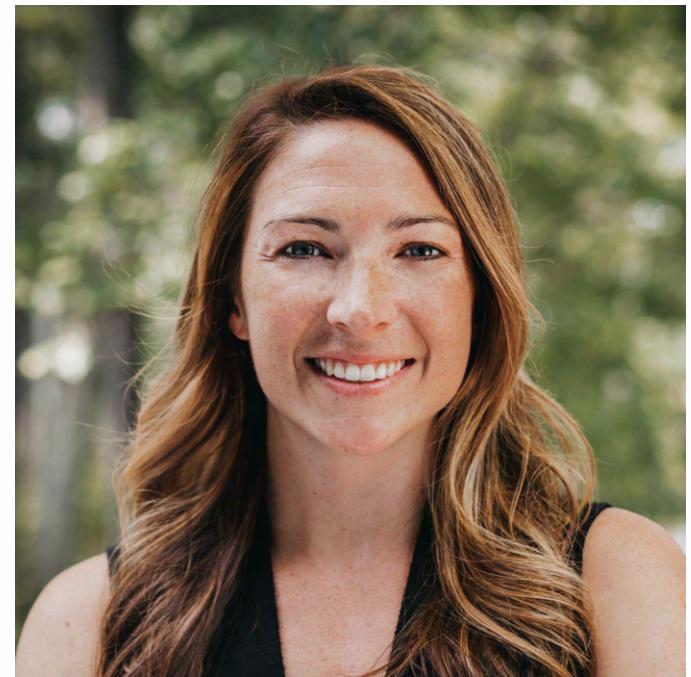
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# Meet the Team

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## Meet the Team



**Kelsey Anderson**  
VP, Client Success

**Persona**  
The Adventurous and Energetic Dynamo



Kelsey Anderson's ability to connect with people and problem-solve has been fostered by her background in psychology and college admission. From working at a Big Ten institution to small private colleges, she brings a range of experiences and strengths to the Carnegie team. Kelsey finds customized solutions for clients using both her people skills and strategic planning. She hails from the Midwest, where she is active in her community and volunteers with a number of nonprofit organizations. In her spare time, she enjoys exploring the outdoors, eating good food at Big Grove Brewery, and competing in triathlons.



**Kate Colangelo**  
Senior Account Manager

**Persona**  
The Resilient And Energetic Thrill-Seeker



Kate thrives on forging genuine relationships between client partners and Carnegie project teams. Kate's mix of experience in higher education and corporate project management helps her meet clients where they are, collaborating from there to reach a shared understanding of success. Her day-to-day essentials are open communication, project efficiency, and dry humor. Kate loves to travel and like any good account manager, of course each trip starts with a to-do list and a spreadsheet (organization is key)!



**Amy Lintner**  
AVP, Web Account Management

**Persona**  
The Sophisticated and Forward-thinking Oracle



Amy is passionate about holistic student success and retention within higher education, centering joy in her detail-oriented, client-centric approach to account management. Amy walks lockstep with our project partners, ensuring that the Carnegie team is an extension of the client team and that the project is executed through an intentional, timeline-minded approach. Her Masters of Educational Policy and Leadership coupled with her previous higher education experience provides a unique lens to her role at Carnegie.



**Jon Shearer**  
AVP, Web Strategy & UX

**Persona**  
The Confident and Sympathetic Host



Jon is a trusted advisor when it comes to higher education websites. He led multiple award-winning website redesigns at private universities for over a decade before joining Carnegie. He also frequently contributed to Inside Higher Ed on timely web topics surrounding content, analytics, and SEO. With roots in both graphic design and front-end development, Jon helps clients navigate complex web projects from day one to launch. Jon enjoys leading a team of web experts who balance innate curiosity with best practices to develop custom web solutions.



**Kirstin Swagman**  
Director, Web Strategy & UX

**Persona**  
The Curious and Assertive Champion



Kirstin has always gravitated toward careers that lead with questions - first as a journalist, then an anthropologist, and now a strategist. She has graduate-level training in ethnographic research and specializes in blending quantitative and qualitative data to develop web solutions for higher education institutions. Kirstin brings more than ten years of experience working in higher education to her role at Carnegie and enjoys helping schools connect with their right-fit students.



**Bill McLaughlin**  
EVP, Web

**Persona**  
The Confident and Curious Adventurer



Bill works closely with our current and potential clients and strategic partners to achieve measurable, deeply satisfying results via superior user experience, information architecture, and technology solutions. With more than 25 years of experience in consulting and software development, Bill is an expert problem solver. Before joining our team in 2007, he spent seven years at CNA Insurance as director of application development where he led large-scale projects that helped to transform the organization.

## Meet the Team

CARNEGIE



**Alayna Setterlind**  
Director, Web Design & UX

**Persona**  
The Inquisitive and Creative Storyteller



With a lens toward prioritizing the user experience, Alayna enjoys collaborating with colleges and universities to elevate their digital presence. Alayna first discovered her passion for design early on through photography and print design before shifting her focus to web design. Today, she leverages her prior creative agency experience and collaborative mindset to guide designers and developers in producing thoughtful, creative, highly-visual design systems.



**Kelsey Lavine**  
UI/UX Designer

**Persona**  
The Curious and Independent Rock Star



Kelsey has a varied background in fine art and graphic design in agency and university settings. Her passion for web design has allowed her to merge her creative and technical skills to create beautiful sites with a strong user experience. She enjoys creating design concepts and systems perfectly tailored to a client's personality. In her free time, Kelsey enjoys reading, attempting to garden in the desert, and experimenting with new design trends.



**Derek Britton**  
UI/UX Designer

**Persona**  
The Non-conformist and Compassionate Guardian



Shaped by a youth dedicated to service and an unconventional journey into design, Derek brings a humble, collaborative, and inclusive perspective to his work. Initially fueled by a desire for self-expression, Derek discovered the influence of design as a way to solve problems for people. Today, he leads with a human-centered approach and comfortably navigates the crossroads of visual appeal, user interaction, and strategic thinking. He enjoys collaborating with teammates and clients to bring elegant and functional design systems to life.



**Greg Zguta**  
VP, Web Technology

**Persona**  
The Wise and Compassionate Impresario



Greg plays a key role in delivering the technical rigor and expansive capabilities for which our web team is known. From discovery and planning through creative development and implementation, he is involved at every step to ensure that all of a project's pieces fit together and function elegantly. He guides Carnegie's web clients in selecting the best technology, including content management systems and other third-party technologies, and also provides diligent support to help our clients integrate these tools.



**Chris Johnson**  
Asst. Director, Front-end Dev.

**Persona**  
The Intelligent and Aesthetic Connoisseur



Chris is a detail-oriented and versatile web professional with over 7 years of experience working on higher education websites. His background encompasses every facet of the web development lifecycle, including user-centered design, front-end web development, product management, QA testing, and team leadership. He plays a pivotal role orchestrating the journey from creative vision to technical execution, resulting in elegant and impactful digital experiences that both look and function flawlessly.



**Shannon Lanus**  
Principal Content Designer

**Persona**  
The Playful and Creative Composer



Shannon works to make sure great content and amazing design co-exist in every mStoner project. Before joining mStoner, Shannon spent five years working in film and television development for companies such as Harpo Films and DreamWorks Animation TV. This included a stint as a creative executive for the first season of an animated kids series on Netflix. Shannon also worked with Disney as part of a small R&D group, exploring applications of metadata in TV storytelling.

# Persona Archetypes Key

## Innovator: Yellow

**Brilliant and forward-thinking**

Driven by inventing the future through innovation. Delivers advancement, ingenuity, and radical outcomes. Values newness, experimentation, and progress. Causes people to feel awe and amazement.

## Explorer: Green

**Adventurous and inquisitive**

Driven by the quest for discovering the unknown. Delivers progress and an unmatched interest for uncovering truth. Value investigation, curiosity, and trailblazing. Causes people to feel intrigued and emboldened

## Creator: Orange

**Creative and imaginative**

Driven by self-expression and artistry. Delivers something new that encourages creativity. Values originality, ideation, and new concepts. Causes people to feel constructive and expressive.

## Competitor: Maroon

**Resilient and tenacious**

Driven by overcoming challenges through grit and determination. Delivers surprising strength, perseverance, and toughness. Values fortitude and hard work. Causes people to feel triumphant and inspired

## Rebel: Silver

**Daring and rebellious**

Driven by challenging and redefining the norm. Delivers empowerment, change, and boldness. Values independence, guts, and breaking with convention. Causes people to feel unrestrained and fearless.

## Provider: Purple

**Supportive and selfless**

Driven by compassion, warmth, and the desire to care for others. Delivers nurturing, comfort, and protection. Values altruism, commitment, and generosity. Causes people to feel valued and supported.

## Entertainer: Red

**Energetic and enthusiastic**

Driven to entertain and cause others to get excited. Delivers fun and the desire to amuse and uplift. Values energy, playfulness, and enjoyment. Causes people to feel exhilarated and happy.

## Sophisticate: Pink

**Sophisticated and refined**

Driven by experience, elegance, and beauty in all forms. Delivers excellence, finesse, and vitality. Values poise, intentionality, and beauty. Causes people to feel desired and important.

## Achiever: Blue

**Powerful and assertive**

Driven by growth and being a frontrunner. Delivers stability, pride, and strength. Values power, influence, and accomplishment. Causes people to feel confident and in control.

## Beige

**Generic and confused**

Beige, though not considered a personality archetype in the model, is still an important consideration. Beige indicates one of two things: a completely neutral personality expression, or one that attempts to do everything at once.

3

# Highlights of Our Approach



# Unmatched Experience

Our team is uniquely positioned to help you embrace a visitor-centric approach to your website. Our experience with hundreds of education institutions, our ongoing research into the needs and expectations of prospective students and their influencers, and the numerous usability studies we've conducted through the years all provide a strong foundation for building a site that is beautiful, engaging, and intuitive.

Equally important, we'll ensure your site is optimized for search engines, and built for key enrollment and other priority conversions.

# Comprehensive and Transformative Solutions

## + Rock-Solid Strategic Foundation

Our 20+ years of experience and our inquisitive and inclusive discovery process inform a smart strategy for your site that spans user experience, design, content, and technology.

## + Audience-Centric Structure and Pathways

We organize your information architecture, navigation sets, and top-level content for prospective students, and provide intuitive pathways to content for other key audiences.

## + Award-Winning Creative

Our creative team explores multiple conceptual directions, ultimately landing on a unique, authentic, compelling, and beautiful expression of your brand.

## + Content-First Approach

We assess your capacity for creating copy, photos, and video and audit the health of your current content. We then right-size your design and plan the migration to your new site.

## + Mobile-Native and Accessible Design

Leveraging modern web development practices and WCAG AA standards, we create mobile-responsive, performant, and accessible design via hand-crafted front-end code.

## + Long-Lasting, Flexible, and Scalable Build

We make it easy for anyone to manage content and on-page SEO. We arm your core team with a flexible page building system, on-board SEO tools, and content syndication capability.

## + Smooth Transition to a Sustainable Ongoing Process

We position you for long-term success via tailored solutions, effective web governance, support for campus contributors, and cultivation of a continuous improvement culture.

## + Data-Driven Solutions and Measurable Outcomes

We leverage data, analytics, and usability studies to refine the user experience, and measure traffic and on-site conversions against your benchmarks and goals.

# Modular Design Systems

Our design systems are highly modular and flexible. Each system includes specific designs for key pages, templates used across multiple pages, content components and widgets that can be placed throughout the site, and on-page design elements.

The following pages list a sample inventory of the user interface components of our typical design system. These elements can be toggled on and off and combined to make dozens of different page layouts.

# Interface Components

These modular components can appear in any order on any page.

- + Hero image with call to action
- + Hero video with call to action
- + Call-to-action block with optional image
- + Full-width image and text widget
- + Image gallery
- + Social media gallery / feed
- + News feed
- + Event feed
- + Faculty feed

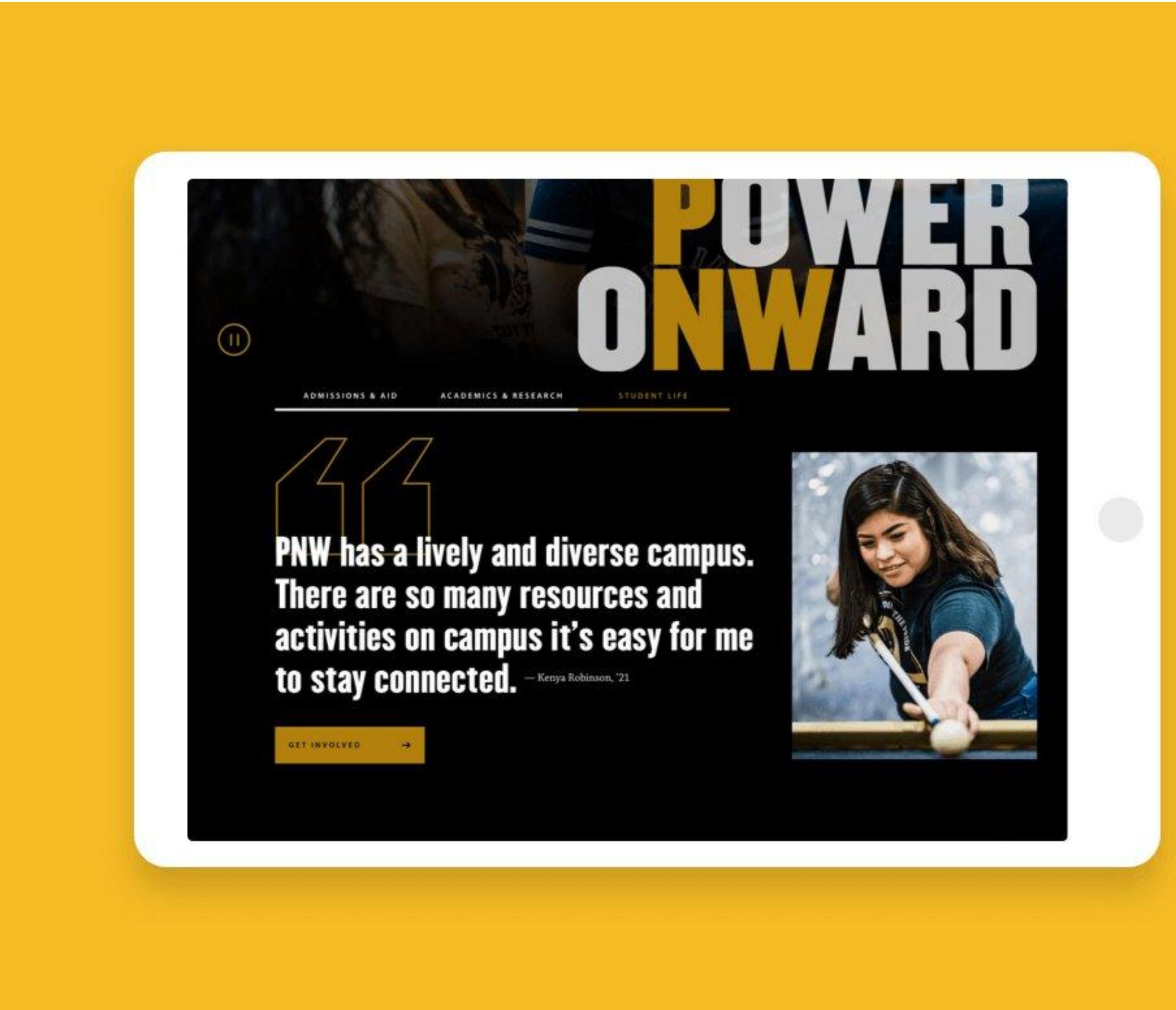


Dakota State University's Visual Interface System

## On-Page Elements

Everything your editors will need to create vibrant and immersive pages.

- + Sidebar panel
- + Sidebar feature block with image
- + Infographic style (text-based)
- + Inline image with caption
- + Inline slideshow
- + Inline video with caption
- + Pull quote
- + Content list style
- + Full-width image
- + Accordion
- + Form elements



Purdue University Northwest's Visual Design

# Accessible to All

As a part of our work with you, we are dedicated to providing a fully accessible website, along with tools and guardrails to help web editors maintain compliant pages.

We embrace the four “POUR” principles (perceivable, operable, understandable, robust). Our approach will include a modular design system with components that are built for adherence to WCAG 2.1 standards at Level AA, and in many cases Level AAA.

# Accessibility

Combined with proper training of your web editors, our modular design system and the content management system will provide the foundation for a site that adheres to principles of universal design, ensuring that your new site is highly usable for all of your audiences.

Our areas of focus will include:

- + Color contrast
- + Font sizing
- + Clear use controls
- + Keyboard navigation
- + Proper heading hierarchy
- + Navigable content hierarchy
- + Clear focus indicators
- + Page movement and interactivity
- + Responsive visual design and front-end code
- + Valid, semantic HTML markup
- + Careful implementation of JavaScript elements that allows for keyboard navigation and content fallbacks

We validate our work using the Web Content Accessibility Guidelines (WCAG 2.1), at Level AA.

Utilizing WebAIM, Sitelmprove, W3C HTML validation, other online tools, and manual review with various input and output devices, we'll test our deliverables during design, HTML, and pre-launch.

# Accessibility Considerations by Project Stage

- + **Wireframe Stage:** Through wireframing pages and templates, we're able to start establishing navigation patterns, interactivity and user control, page and heading hierarchy, and image captions or links to video transcripts. Accounting for these important functional features ensures that once we start on design, we have a solid foundation to work from.
- + **Design Stage:** In this phase, we focus on font size and color contrast, motion and micro-animations, device responsiveness and interactivity, and hover states and link focus. We internally review designs to ensure adherence to AA standards at minimum. Since initial designs will be static prototypes, we create internal documentation to outline all planned specifications for interactivity and animations. This ensures that from design to development, we aren't losing sight of what we've strategically and methodically planned from an accessibility standpoint.
- + **Content Management System Customization:** To ensure that web editors are able to maintain compliant pages, we will incorporate accessibility guardrails into the CMS. These will help enforce the use of essential elements such as tags for alt text, headings, page titles, and meta descriptions, as well as accessible color contrast, font sizing, and more.
- + **Pre-Launch Quality Assurance:** Prior to launching the new website, we'll re-test sample pages using each page template design using the same front-end Development testing tools. This testing confirms the front-end code remained compliant after the back-end was implemented, and also begins testing site content for accessibility compliance.
- + **Training:** Our training and related resources include the fundamentals of accessibility. This training should be required for all content editors before they can gain access to the new CMS environment.

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# Project Delivery Framework



# Flexible Framework

Our project delivery framework is based on software development methodology and best practices. It defines key elements that span all of our projects – activities, deliverables and a common vocabulary – yet offers the flexibility to adapt to the unique aspects of each client project. Within this framework, we've adopted modern and agile methods for producing our work, sharing it with you, and managing our workflow.

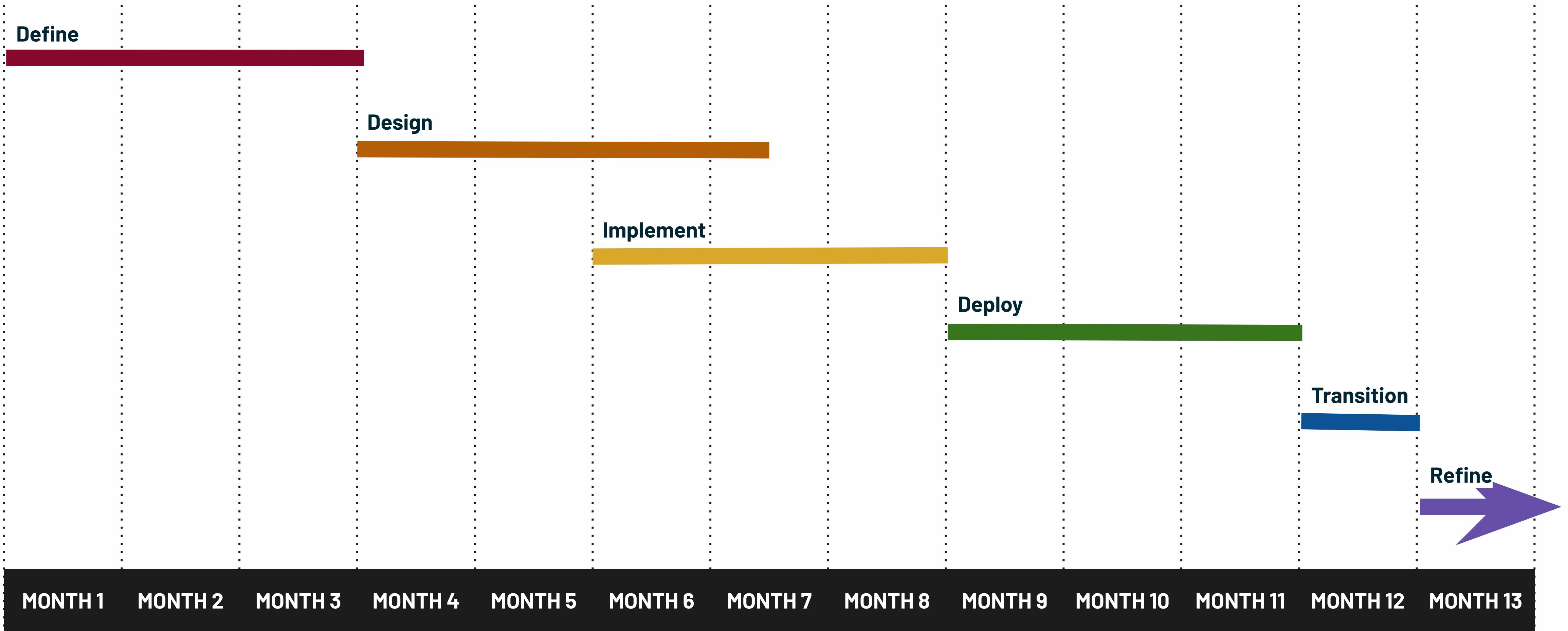
| Phase         | Goals for Your Project   |
|---------------|--|
| 1. Define     | To conduct an immersive discovery, including focus groups with key stakeholders, and to develop a strategy for your new website that spans user experience, design, content, a new content management system, and other functionality and technology needs. Also, to plan for effective web governance for the new site. |
| 2. Design     | To establish a creative direction for the project, create a comprehensive, intuitive, and flexible design system, and convert the design system into fully functional, accessible, and responsive front-end code.  |
| 3. Implement  | To build a scalable and easy-to-use content management system implementation, to create effective and search-engine-optimized copy (40 pages), and to establish a model for your team to do the same.  |
| 4. Deploy     | To plan for and execute the migration of content into your website (and support your team in doing so), to conduct usability and quality assurance testing, and to prepare for and execute a successful site launch.   |
| 5. Transition | To address any post-launch issues and to prepare and equip you for long-term success in managing and evolving your website in a decentralized environment.   |
| 6. Refine     | Optionally, to assist you in the ongoing measurement, maintenance, support, and enhancement of the website.  |

# Tailored Project Plan

At the beginning of the project, we'll develop a tailored approach and plan, and a timeline that focuses on key deadlines and leverages interim milestone markers to keep everyone on track.

The timeline will take into account the academic calendar, holidays, and any other dates that might affect the work. We'll give you plenty of time to plan for periods that will require heavy input or review from your team and crucial stakeholders across the institution.

# Timeline for a Standard Redesign



## Timeline Comments

1. At present we are available to start the project in June 2024. This means the official project kickoff would occur in early June and discovery activities would commence shortly thereafter.
2. If there is a window of time between contract signature and project kickoff, we will provide a list of materials that we'd like to review prior to discovery and a set of pre-work tasks that your team can tackle in advance of kickoff.
3. The proposed scope aligns with a typical website redesign for a project of your size, which has a timeline of 12 to 14 months from kickoff to initial site launch. As such, we are forecasting a summer 2025 initial launch for Drake.edu.
4. Based on the size of your web presence, you should expect that multiple launch events will need to take place after the initial launch to fully migrate your content into the new design.
5. We view timelines as living documents that help to guide and focus our combined team. We will work collaboratively together and both Carnegie and Drake will have a part to play to ensure that we stay on schedule. Timelines should not be viewed as promises, commitments, or "set in stone."

# Collaborative Approach

During the project, we'll conduct regular status meetings to communicate progress to the plan and highlight accomplishments, priorities, risks, and issues. We'll also schedule frequent ad-hoc meetings to collaborate and share our work with you.

We leverage a web-based, team collaboration tool called [Asana](#) that provides threaded communications, task management, and centralized file sharing for the project. Asana acts as the electronic hub for all project communications and key information.

# Fixed-Bid Budget

We are committed to fixed-bid projects.

When new information arises that threatens the scope, schedule, or budget, we'll work collaboratively with you to ensure that we have evaluated all possible options. We'll always present an alternative that involves no additional cost to you.

If we agree on a revised direction, we'll gain your written approval via a change order prior to taking on any additional work.

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# Proposed Budget



# Scope of Work & Executive Summary

This pricing is a firm bid based on our current understanding of your project needs.

Additional charges will not be incurred without a collaborative analysis of all available options and without your prior written approval.

Our proposed budget does not include out-of-pocket expenses, such as travel and related incidentals, discovery session transcript fees, required fonts, illustration libraries, or expedited delivery. We invoice clients for out-of-pocket costs as they are incurred.

For this project, we anticipate out-of-pocket costs will be approximately \$10,000.

# Executive Summary

| Phase        | Scope of Work  | Cost             |
|--------------|--|------------------|
| Define       | Discovery, SEO strategy, analytics benchmarking, website strategy, governance plan         | \$115,270        |
| Design       | Creative concepts, design system, front-end development                                    | \$105,600        |
| Implement    | CMS implementation and customization, SEO writing workshop, copywriting and optimization   | \$166,800        |
| Deploy       | Content migration starter kit, manual content migration, usability testing, launch support | \$39,250         |
| Transition   | Post-launch support, CMS training  | \$19,600         |
| Refine       | Post-launch SEO reporting  | \$9,000          |
| <b>TOTAL</b> |  | <b>\$455,520</b> |

# Define Phase

## DISCOVERY SCOPE OF WORK:

**Discovery preparation:** our team will study all relevant materials, including strategic documents, creative campaigns and any recent studies, surveys, analytics, or information that will deepen and broaden our understanding of your institution. We'll work with you to plan for our onsite or remote discovery meetings.

**Discovery:** we'll conduct small-group interviews with key stakeholder groups, focus groups with students and faculty, and workshops with the core project team.

**Discovery summary:** we'll recap what we learned during our meetings and align with the core team and stakeholders prior to proceeding to our strategy work.

**\$36,400**

## SEO STRATEGY SCOPE OF WORK:

**Audit:** we'll conduct a comprehensive review of the current site and the many factors that impact SEO, including title tags, meta descriptions, 404's, and duplicate content.

**Review and Planning:** Over a series of phone calls and screen shares, we'll work closely with you to help you understand why these issues are occurring, how to avoid them on the new site, and how to prioritize and implement any adjustments to the current site. We'll also lay out a plan for redirects and other SEO considerations that are necessary for a successful launch of a new website.

Results from the SEO Strategy will inform our Creative and Content Strategy for the new website.

**\$11,000**

## ANALYTICS BENCHMARKING AND ANALYSIS SCOPE OF WORK:

We'll set the stage for data-driven reporting and decision making by evaluating your current visitors' behavior, engagement, and traffic sources using Google Analytics. Benchmarking current audiences and pages can lead to an understanding of how your site is performing and discover how it can be improved to deliver the ideal experience, informing the new website strategy.

Also, this service will help to measure and prove critical post-launch ROI and impact on key metrics and institutional goals (e.g., RFIs, event registrations, or applications).

Scope includes:

- GA4 Property Audit & Event Measurement Plan
- Event and Key Event Implementation
- User Behavior Analysis & Site Search Analysis
- Website Benchmarking Report - Understand key site metrics before and after the site redesign
- Reconfiguration post site launch

**\$17,500**

# Define Phase (continued)

## WEBSITE STRATEGY SCOPE OF WORK:

**Messaging:** we'll outline recommended messaging for the website based on your brand, visual identity, and our discovery work.

**Information architecture:** we'll develop a hierarchical map for the new site, focusing on the main sections at the top levels, lower-level sections that are key for external audiences, and other areas of priority based on your requirements (Note: this is typically three to four levels of depth and does not touch every page or section on larger sites).

**Content:** we'll create five content models that describe the purpose, content, and priority user tasks for key pages. We'll inventory your current page structures to right-size our design and inform the plan for migration to your new site.

**SEO:** we'll recommend URL patterns for the new site, map existing patterns to our recommendations, and establish a redirect strategy and plan.

**User Experience:** we'll develop five wireframes that illustrate page layout, navigation, content hierarchy and proposed user interface components for the homepage and other key page templates within our strategy.

**Functionality:** we'll recommend a best-fit CMS platform based on your needs and requirements. We'll catalog all of the features of the current website and provide a recommended path forward into the new environment. We'll also help you evaluate any future-forward functionality (e.g., personalization, AI) other ancillary needs including website QA software.

**Approach and plan:** the results of our strategy work will come together into a document that describes the approach to the website build and migration and provides a visual at-a-glance view of the plan. This includes a work breakdown structure, a concise list of planning assumptions, and key foundational decisions.

**\$36,570**

## GOVERNANCE PLAN SCOPE OF WORK:

**Assessment:** we'll review your current organizational capacity, policies, and structures that support the website.

**Recommendation:** we'll propose a plan for the governance model, guidelines for decentralized content contributors, core team staffing, CMS roles and permissions, and requisite training and support structures.

Assumes that your staff will be responsible for changes to any detailed policy documentation that underpins the governance model and guidelines.

**\$13,800**

# Design Phase

## VISITOR INTERFACE DESIGN SCOPE OF WORK:

**Concept creation:** building off our strategy work and mindful of your brand creative work, we'll create two unique creative concepts for the site, each expressed via a homepage design.

**Design system:** once the conceptual direction is established, we'll create a comprehensive, modular and flexible system of base layouts and design components that can be used to add rich functionality and visual interest throughout the website.

**Template suite development:** using the layouts and components of the design system, we'll create mockups for a secondary landing page, a tertiary page, and five to-be-determined use-specific designs.

In total, the design suite will include a homepage, two base layouts with 10 components each, and five additional template / page designs that extend the design system with additional components and possibly unique layouts.

**\$54,400**

## FRONT-END DEVELOPMENT SCOPE OF WORK:

**Programming:** we'll convert the design system into fully functional and custom-built front-end code (HTML, CSS, and JavaScript). The design will be responsive to web browsing on standard desktop, tablet, and mobile devices.

**Testing:** we'll test the code on the most common browser and operating system combinations on both desktop and mobile devices and validate the code for compliance with WCAG 2.1 accessibility standards at Level AA. Browser and operating system testing includes the combinations below. A specific list of browser and operating system versions that are currently used in our testing can be provided upon request.

- Windows: Chrome, Edge, Firefox
- macOS: Chrome, Firefox, Safari
- iOS: Chrome, Firefox, Safari
- Android: stock Android browser on the test device, Chrome, Firefox

**\$51,200**

# Implement Phase

## CMS IMPLEMENTATION SCOPE OF WORK:

**Configuration:** we'll complete the base installation, install and configure modules/plugins, and define all required content types, media types, page components, menus, and taxonomies.

**Theming:** we'll convert the HTML/CSS templates into a custom theme.

**Development:** we'll implement any back-end code necessary to implement the required features of the design system.

**Testing:** we'll plan and execute a thorough quality assurance test.

Functionality included in the base implementation:

- Single site implementation
- News and posts content templates and listings
- Content editing capability including WYSIWYG editor
- Page templates to match the full template suite and design system
- Two-tier alert display via external feed or CMS template
- Content syndication capabilities including component-based implementation, reusable supplemental content types, and supporting taxonomy (also known as, "Create Once Publish Everywhere")
- Media library for documents, images, and Oembed videos
- CMS-centric or Google-based internal site search
- URL aliasing and friendly URLs

**\$62,800**

**Pricing assumptions:** Cascade, Drupal, Squiz, or WordPress is chosen as the CMS. All development work will be performed via Carnegie's internal preferred development tools, environments, and processes.

Pricing does not include software license costs of any kind, including but not limited to CMS, modules/plugins, web quality control software, chat bot licensing, third-party search, forms, or calendar platforms.

If Drake chooses a CMS platform other than Cascade, Drupal, Squiz, or WordPress, this budget line item may need to be reshaped to fit the selected CMS. If we agree that it makes sense for Drake to contract directly with a CMS provider for implementation and training services, we'll credit the majority of this budget back for Drake to reallocate.

# Implement Phase (continued)

## ADDITIONAL FEATURES / CMS CUSTOMIZATION SCOPE OF WORK:

This is a budget allowance for additional features or customization that may be required. We'll work together to finalize this portion of the scope and budget during the Define phase of the project. The scope will be defined in detail and each individual scope item will be priced. Possible features include:

- Faculty Bio / Profile template
- Faculty Directory integration
- Course Catalog integration
- Third-party calendar integration and styling
- Additional content structures and/or CMS templates for special needs (e.g., marketing landing pages)

**\$30,000**

## SEO WRITING WORKSHOP SCOPE OF WORK:

We'll train and enable your content contributors to create and maintain effective and search-engine-optimized content with their sections of the web presence.

To do this, we'll conduct two collaborative Zoom sessions, spaced two weeks apart and each lasting two-and-a-half hours. Between the two sessions, attendees are given a practice assignment to optimize a piece of content.

Participants are encouraged to collaborate virtually during each session, and breakout rooms will be utilized within Zoom to facilitate group work.

Links to reference materials, presentation decks, and recordings of the Zoom sessions will be provided.

**\$6,600**

## WEB COPYWRITING AND OPTIMIZATION SCOPE OF WORK:

Content: production of 40 marketing-critical, search engine-optimized content pages for the new site including copy and two rounds of copy editing. Our typical approach is to write academic program pages, top-level landing pages, and feature stories.

Image optimization: Image optimization is essential both for SEO and ADA compliance. Carnegie will optimize images for the 40 pages of content that we create. This will include performing keyword research and writing the alt text for each image.

Additional content development can be purchased in bundles of five pages, at \$8,200 per bundle (includes image optimization).

**\$67,400**

# Deploy Phase

## CONTENT MIGRATION STARTER KIT SCOPE OF WORK:

We'll use this line item as a 32-hour allowance to assist with the planning and commencement of content entry and migration activities. Our approach will likely include building a few example pages that take full advantage of the design system and build out of the skeletal structure of the information architecture in the new CMS.

**\$4,800**

## MANUAL PAGE BUILD / CONTENT MIGRATION SCOPE OF WORK:

We'll manually enter content into the CMS for 100 pages. This includes text, images and metadata.

Price assumes a mix of 35 percent simple pages, 50 percent moderate pages and 15 percent complex pages. Simple pages are mostly plain text. Moderate pages include text, imagery and a few additional elements (e.g., a basic table). Complex pages include many images or design components and/or complex data or tables.

Content will be provided in an organized fashion by Drake.

Additional Page-level migration can be purchased in 25-page blocks at \$3,700 per block.

**\$17,050**

## BETA SITE USABILITY TESTING SCOPE OF WORK:

**Testing:** we'll use a structured process to gain feedback on the effectiveness of the beta site in terms of user experience and interface. We'll conduct the testing remotely with software enabled to record, aggregate and summarize feedback (both verbal and on-screen actions) from usability testing subjects.

**Report:** we'll document a summary of findings and recommendations for improvement.

Includes a single round of usability testing with 10 individual testing sessions, each with one person.

Includes a \$5,000 allowance to adjust the design and front-end implementation based on the results of the testing.

**\$13,400**

## LAUNCH SUPPORT SCOPE OF WORK:

We'll provide 20 hours of web developer time to assist with launch preparation and "go live" activities. Typically includes working with your team on server redirect configuration, sitemap and SEO configuration, and submission of re-crawl requests to popular search engines.

**\$4,000**

# Transition Phase

## POST-LAUNCH SUPPORT SCOPE OF WORK:

At no additional charge, we'll support your team by resolving any issues that are rooted in our implementation or project deliverables. This includes items reported within the first 30 calendar days after launch.

Outside of the 30-day support window, we've allocated 30 hours of web developer time to aid in the transition from implementation to ongoing operations.

**\$7,000**

## CMS TRAINING SCOPE OF WORK:

**Pre-Migration Training:** we'll deliver web-based just-in-time training for the project team prior to content migration.

**Post-Launch Training:** we'll deliver web-based training shortly after launch:

- A two- to four-hour session for content administrators.
- A two- to four-hour session for content contributors. This is typically train-the-trainer, enabling your staff to train the broader user population.

**Documentation:** we'll produce thorough guide documents for each type of CMS user plus technical documentation for IT team members.

**\$12,600**

# Refine Phase

## **POST-LAUNCH SEO REPORTING AND ANALYSIS SCOPE OF WORK:**

We'll develop a Google Looker Studio dashboard to report on the website's post-launch organic search performance. The dashboard will pull in data from Google Analytics, Google Search Console, and rank tracking tools as applicable. In this way, your team will be able to visualize changes in organic clicks, impressions, and average position rankings.

We'll meet with you once per quarter for the first year after launch to analyze and synthesize the data and discuss insights and suggestions for iterative improvement.

**\$9,000**

# Our Work

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The collage includes the following elements:

- A banner for the "Russell G. Weigand Center for Professional Excellence" with the tagline "Get a Great Start on Your Future". It features a call to action: "Are you ready to start planning your career? It's never too early to lay the groundwork, and it's never too late, either."
- A section titled "Internships and Career Experiences" featuring a photo of a woman in a professional setting.
- A section titled "Employers: Connect with Our Talented Students" featuring a photo of students at a job fair.
- A section titled "CAREER MANAGEMENT IS VITAL TO SUCCESS" featuring a graphic of a compass rose.
- A "Career Advice on Demand" video player showing a person speaking.
- A "Take Career Portal" section with a "Handshake" logo.
- A "Virtual Touch" section with a photo of a student.
- A "Undergraduate" section with two smiling students.
- A "Graduate" section with two smiling students.
- A testimonial from Dennis Alvarez: "Elmhurst has a really solid nursing program, and I like the small-school environment that it offers. I chose nursing because I really enjoy helping people. I think that's my purpose in life, to serve others." - Dennis Alvarez '23
- A footer navigation bar with links: "HOME", "FINANCIAL AID", "IMPORTANT DATES AND DEADLINES", "MAJORS AND MINORS", "VIRTUAL CAMPUS TOUR", "ON-CAMPUS AND CAMPUS", and "CONNECT WITH ELMHURST".

# Agnes Scott College

We created a beautiful new design and immersive visitor experience for Agnes Scott College. The site illuminates their brand and brings stories of their people to life. We also elevated Agnes Scott's signature Summit Experience that provides each student with leadership development, professional opportunities, and global experiential education.

[Read the Agnes Scott case study](#) for more information.



## Interlochen Center for the Arts

Starting with their new visual identity and our comprehensive strategic foundation, we created a new look-and-feel to highlight Interlochen's unique creative energy and close-knit community. We designed a visitor centric website that is commensurate with one of the nation's premier boarding arts high schools and summer camps, elevated program pages for visitors and search engines alike, and implemented a best-in-class Drupal build.

[Read the Interlochen case study](#) for more information.



# Other Recent Launches

[Belmont University](#)

[Clarkson University](#)

[Indiana State University](#)

[Kogod School of Business at American University](#)

[Palm Beach Atlantic University](#)

[SUNY Downstate Health Sciences University](#)

[University of Dallas](#)

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# References



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# Appendix: Process Details

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# Define

## Gathering Information

We begin by conducting an immersive and collaborative discovery. We want to capture your functional needs and requirements for the project and to understand the essence of your institution. What's it like to be on campus? What's different about your students? What are your programs of distinction? Your firsts, bests, and onlys? Your points of pride?

We take several weeks at the onset of the project to gather and review anything and everything we can get our hands on. We use this information to craft an approach and focus for our discovery interviews.

We then conduct a rigorous discovery process – on campus, online, or both – with stakeholders that include students, faculty, and staff. We talk to groups of students. And we workshop with your core team.

## SEO Strategy

Google takes into account dozens of factors to rank your website in search engine results. Many of these elements focus on your backend setup – Do title tags and meta descriptions meet the length requirements? Do any pages lead to 404 errors? What duplicate content exists on the site?

Our technical SEO strategy goes beyond crawling your site to inform your team about errors and warnings. We work closely with you to help you understand why these issues are occurring, how to avoid them on the new site, and how to prioritize any adjustments to the current site. We'll also lay out a plan for redirects and other SEO considerations that are necessary for a successful launch of a new website.

## Content Strategy

In terms of content strategy and information architecture, we take a user-centric approach. Our philosophy is that prospective students are your primary audience, and we focus on their needs first and foremost. For secondary audiences, we create intuitive navigation pathways to the content they need and surface clear calls to action.

We'll use the SEO Strategy results to inform our information architecture and content strategy recommendations and to identify pages to eliminate.

By utilizing data from your Google Analytics and Google Search Console accounts, we can see how your audiences interact with your current website, identify where they're encountering roadblocks, and decide what key content we should elevate in your site structure. We use [cloud-based Slickplan](#) to organize your site and build your information architecture.

# Define

## Web Governance

Web governance planning and policy implementation is an essential part of a successful web initiative.

A good governance plan takes into account resources, processes, standards and guidelines, policies, and training. All of these factors must come together to ensure the integrity of your web presence over time.

To help you with your web governance needs, we'll review your existing policies and facilitate conversations with stakeholders to explore the following:

- + Have you clearly designated ownership of specific sections and pages?
- + Do you have the right editors and publishers in place across your institution?
- + Do those editors and publishers have the proper skills and training to be successful?
- + What ongoing resources do you need to provide your users?
- + What tools do you have in place to help with web maintenance and enhancement? How do people get access to those tools?
- + Do you have the optimal cycle for content reviews and updates?
- + What mechanisms for accountability may you use?

We begin working on governance during the Define stage of our process. At the outset, we'll identify opportunities to create new policies or update existing ones based on our discussions and planning sessions.

We'll then revisit the topic of governance once we've made decisions about content strategy, information architecture, and visual design.

We'll make recommendations for improvements and additions to your existing policies based on our discoveries and help you socialize the policies, both with the people who'll need to abide by them and those who'll need to enforce them.

# Define

## Content Management System Selection

One of the main choices you must make is the content management system that you plan to use.

Over the last 20 years, we've implemented hundreds of higher education websites across many content management platforms and many clients seek our assistance in picking a CMS for a website redesign.

We most frequently work with the following content management systems that have a great rate of adoption with higher education:

**Open Source:**

- + WordPress
- + Drupal

**Commercial:**

- + Hannon Hill Cascade CMS
- + Modern Campus Omni CMS
- + Squiz
- + TerminalFOUR

To help you select the best-fit content management system, we'll work with you to catalog and prioritize your website requirements and needs, as well as your technical and functional requirements for a CMS.

Key decision criteria include the number of content editors and the amount of decentralized content management, technical architecture preferences and complexity, and the capacity and skills of the web team.

Based on that prioritized list and armed with the details that our conversations will have provided, we'll make a recommendation for a best-fit system that addresses your needs and expectations.

# Define

## Google Analytics Strategy + Benchmarking

We believe that redesign efforts should be data-driven, relying on facts as well as intuition and a deep understanding of the needs and expectations of all of your audiences.

In order to start making data driven decisions you need to have the correct data. Our team has a structured approach to data-driven website redesign.

The four steps of our process:

**Step One:** Our certified Google Analytics specialists conduct an assessment of your account to build data collection confidence by ensuring proper setup and feature utilization.

**Step Two:** Utilizing Google Analytics, our team analyzes onsite search to understand what users are searching for on the site and how effectively. This information provides insight into what information should be added on the new website.

In the event that our team discovers your site search is not properly configured this will be resolved during the assessment period. In this situation the site search will have to be performed after at least three months to ensure there is enough data to gain insights.

**Step Three:** We develop a measurement strategy to help create a cohesive dataset for the institution across campus websites.

We create a benchmarking report for your selected core web pages and website audiences. We also use this report post-launch to prove ROI through comparative analysis to the benchmarking dataset. This report includes data on users, bounce rates, sessions, time on site, heat mapping, and other key metrics.

**Step Four:** We'll develop Data Studio comparison report based on benchmarking statistics gathered pre-launch vs. three months post-launch.

# Design

## Conceptual Creative & Design System

Moving into creative, our team starts with workshops and ideation sessions to explore different visual design, user experience, and content strategy approaches. With Drake's web design process, we'll be starting with a strong foundation, leveraging clear brand standards, your messaging platform, and new creative campaign, "Open".

At this stage of the project, it's all-hands-on-deck. We work as a team to develop creative feature ideas, preliminary navigation sets, page layouts, and key messages for the site. This work comes together in the form of wireframes and content models that we'll review and refine with you to ensure a shared vision for the project.

From there, we move into conceptual creative. This is when visual design and user interface decisions start to take shape. We'll express our conceptual ideas in the form of two unique and distinct homepage designs. These concepts are in no way constrained by technology — our design team drives the process without any imposed limitations based on CMS platforms, frameworks, starter themes, or other technologies.

Once we've agreed on a conceptual direction, we'll begin to build a robust, flexible, and modular design system. Typically, we start with global elements including the header, footer, navigation, and menu sets. When these foundational elements are in place, we'll design unique pages, page templates, and a suite of widgets and content components that can be reused across pages on the site.

Throughout the process, we iterate between mobile and desktop viewports to refine the user interface. Our design team uses [Figma](#), and we share our ideas and collaborate with you within the Figma interface.

# Design

## Front-End Development

After the designs are approved, we'll move into front-end development. We convert the design system into hand-crafted HTML, CSS, and JavaScript. We do not rely on a framework. Instead we build lean and custom HTML from the ground up – optimized for speed and accessibility – using a process that leverages Sass, Nunjucks templating, and continuous integration into Github. When necessary, we will leverage specific aspects of JQuery, Angular, and other JavaScript libraries.

We leverage a variety of approaches to optimize page load speed. Typically, we craft our CSS and JavaScript to prevent the browser from performing numerous reflows and repaints. This is crucial when working with micro-animations and transition states. Images account for more than 60% of the size of a typical webpage – we use responsive images (for example, srcset) to improve page load time on mobile devices and tablets that frequently utilize cellular data networks with slower speeds.

# Implement

## CMS Implementation

As we transition into the technical phase of the project, we carefully plan the implementation from a functional and technical perspective. We create a detailed specifications document and consider ease-of-use for all user types, from occasional contributors to power users.

The next step in the process depends on the content management system. For Drupal or WordPress, our team will convert the HTML templates into a completely custom theme. We'll create custom content types to facilitate content sharing and leverage a modular approach that allows for pages to be built with simple drag-and-drop options.

We'll install and configure trusted modules or plugins to extend functionality where it makes sense, while ensuring the site remains lean and optimized for performance. We manage our development environment and configuration management with [Github](#) and [Pantheon](#).

For commercial systems, we'll typically partner with the professional services arm of the CMS provider or a trusted platform-specific implementer to build the site. In this scenario, we'll ensure a smooth transfer of our deliverables and remain engaged throughout the implementation phase.

Typically, we'll allocate time to help with implementation tasks and adjustments to front-end code. We'll also act as subject matter experts on the project strategy, design, and requirements. We'll work collaboratively with our partner to ensure a seamless experience for you, and a successful end result.

# Implement

## Web Copywriting and Optimization

Our approach to web copywriting is steeped heavily in search engine optimization. After all, content is the most important factor in site ranking for Google and other search engines. Our team of professional writers are not only expert storytellers but are also trained in how to optimize copy for the most qualified and searched-for keywords.

With the goal of getting your institution to show up in Google for the most searched-for keywords and phrases, we optimize both frontend and backend content (metadata) for priority pages on your website.

Once a user actually clicks through to your site, we want to ensure the content provides a positive user experience. We utilize various data points – including Google Analytics, Google Search Console, and keyword research tools – to understand what your audience is looking for and tailor content to those needs.

In this way, the content not only appears in search results but also illustrates understanding with your audience, making it more likely that they think your school or a specific program is right for them and thus fill out a request for information form, sign up for a visit, apply, and ultimately enroll.

That's why it's important that your website's content matches the search queries that got them there and answers all the questions prospective students might have. These changes are intended to enhance organic search visibility and user experience, which in turn drives all marketing efforts

We'll work with you to identify priority pages for web copywriting and optimization, which may include rewriting existing pages or writing new pages from scratch. The highly optimized content we'll deliver will also have metadata, a keyword list, header tags, and internal link recommendations.

## Image Optimization

Image optimization is essential both for SEO and ADA compliance. We'll optimize images you provide for the pages you designate in this scope of work.

Our efforts will include performing keyword research and writing the alt text for each image you provide.

# Deploy

## Usability Testing

Questions that we explore in a usability study include:

- + Can prospective students find the request-for-information form?
- + Are they able to easily locate information about a specific academic program?
- + How do they navigate to the application checklist?

Our usability studies also measure site visitors' emotional response to design and site structure. For example, users provide feedback such as:

- + "I would have thought the apply button would be in the top navigation."
- + "I find the photo here really distracting because it means I have to scroll down before I can see any content on the page."
- + "I love success stories of young alumni because they make me feel like I can achieve my goals, too."

We offer both unmoderated usability studies through [UserTesting](#) and moderated, one-on-one sessions using Zoom.

For both unmoderated and moderated studies, we'll create a list of general questions and specific tasks that we ask individuals to complete.

Typically, our studies include 10-15 total questions, and sessions last for 10 to 25 minutes. When testing prototypes, we limit our testing to desktop viewports. In testing beta-sites or live sites, we test both desktop and mobile versions.

Usability studies typically include a total of 10 sessions. We recommend no fewer than five sessions for each audience segment that you would like to include in the usability study.

Once our usability study is complete, we'll compile the data and produce a list prioritized changes and enhancements to your site.

Our project budget typically includes funds to implement the most important changes and enhancements immediately. Our team can also work with you to identify additional opportunities to evolve your site over time – based on analytics, A/B and multivariate testing, heat map studies, and additional usability studies.

# Deploy

## Content Migration

Beautifully executed design is only half the battle of accurately elevating your brand. Great design should align with quality content to deliver an engaging user experience on your new website, making content migration a critical stage within your project. We'll be with you every step of the way, providing guidance in planning and executing your content migration.

## Launch

Finally, we'll work with you and your on-campus team to plan and execute a seamless and coordinated site launch. This typically involves partnering with your technical team to establish an approach to URL redirects, ensuring SEO and analytics configurations are properly in place, and helping you organize the steps involved with taking the new site live.



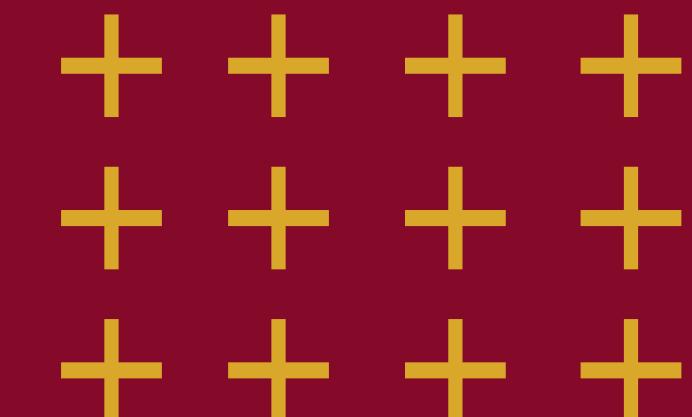
# CARNEGIE

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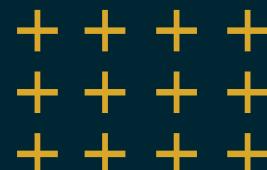




# Drake University

‘24-'25 Annual Recommendations

CARNEGIE



# Drake University Recruitment and Marketing Leaders,

Thank you for the opportunity to submit a proposal for our continued partnership moving into next cycle's recruitment and marketing plan.

As we delve into another chapter of collaboration, I am thrilled to reaffirm our unwavering commitment to Drake's success. Reflecting on our journey together, it's evident that the synergy between our teams has evolved and grown over the last cycle.

With each project we've undertaken, from refining messaging strategies to navigating the intricacies of digital outreach, our collaboration has not only yielded tangible results but has also enriched our comprehension of Drake University. Your institution's values, aspirations, and unique personality have become ingrained within our approach, positioning us not merely as external consultants but as members of your team.

As we embark on this new phase of work, I am energized by the prospect of continuing to share our insights, expertise, and resources to propel Drake University. Let's continue to experiment and collaborate to accomplish Drake's enrollment goals, connecting with the right students with the right message.

As you review our proposal, please feel free to contact us if you have any questions or would like additional information. Hopefully, this proposal will serve as a springboard for additional conversation and collaboration – we'd love to tailor our approach to your needs.

**Go bulldogs!**

**Kelsey Anderson**

VP, Client Success

651-353-7821

[kanderson@carnegiehighered.com](mailto:kanderson@carnegiehighered.com)

# Our Proposed Approach

# Your goals are our goals

Your goals reflect your desire for continued efficiencies, differentiation, and more effective recruitment and marketing execution.

We understand that you need to:

- + **Grow traditional first-year student enrollment**
- + Lean into **secondary and tertiary** markets identified in last cycle Market Opportunity Index research
- + Audit Drake's **Slate** instance for efficiency and effectiveness
- + Continue to support **transfer students and promotion of Bright College** in outreach efforts
- + **Reach prospective students earlier** in the college selection process

# Landscape changes demand a new approach

- **The demographic cliff:** fewer students to recruit
- **The decrease in access to prospect data:** fewer test takers, data privacy policy, and the end of race-conscious admission
- **The rise of GenZ:** students demand authenticity, customization and to be met where they are
- **The digital revolution:** 24/7 access to information has changed how people think and act
- **Buyer Controlled Market:** all these changes have given students all the leverage

**1 million**

The cumulative drop in  
Fewer test takers in  
2023 compared to 2019

**22%**

The drop in students  
enrolling in college directly  
from high school in 2022

**55%**

The average tuition  
discount rate for  
first-year, full-time  
students in 2021-22

**30%**

The percentage of  
college freshmen who  
drop out

**6**

The typical number of  
colleges and universities  
that seniors apply to

**\$58T**

The amount of money  
transitioning from  
Boomers to Xer's and  
Millennials this decade

**25%**

Gen-Z students who  
discover one or more  
schools through social  
media

**35%**

College-aged students  
who report that they  
tend to distrust  
education institutions

**92%**

Students who indicated  
that being authentic and  
true to oneself is  
extremely or very  
important

# Yield-focused Approach to Student Search

Our Student Search is counter to the traditional high-volume, low-conversion Student Search of the past. Your enrollment solution will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals. With yield as our ultimate measure of success, **we focus on increasing engagement and conversions at each stage in the enrollment journey**, from prospect to deposited student.

## A collaborative partnership focused on yield.

### ***Tip the scale***

Recruit with purpose by using market research to inform prospect acquisition and predictive modeling to identify those with greater propensity to take action.

### ***Use personality to personalize***

Capture attention and build connection with your prospects through psychometric segmentation and research-backed creative.

### ***Campaigns should be agile***

Drive engagement with precision digital advertising and dynamic email communications, that are monitored for performance and optimized to meet your enrollment goals.

### ***Data should be owned and available***

Gain a competitive edge with real-time reporting and automatic ownership of every record sourced.

### ***Resources should be used efficiently***

Leverage predictive and actionable data sets to spend your time and money where it matters most.

### ***Your Student Search should be custom crafted***

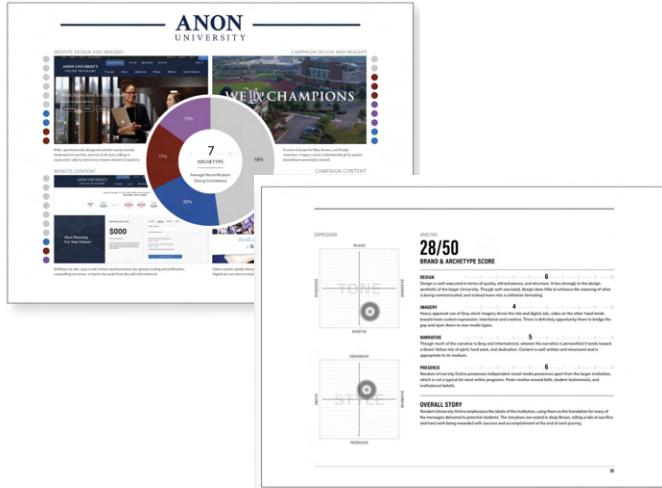
Pair your institutional knowledge with our best-in-class services for the exact solution you need today, and know that we are already building the solution of tomorrow.

### ***It's more than "Search"***

Enrollment management today is so much more than search response and application generation. This Student Search is the marriage of smart enrollment and marketing strategies. We include yield drivers like financial aid strategy and yield campaigns. We support the full enrollment journey, to support your enrollment aspirations, by increasing engagement and conversions, and ultimately yielding your class.

# Research + Assessments

# Competitive Analysis



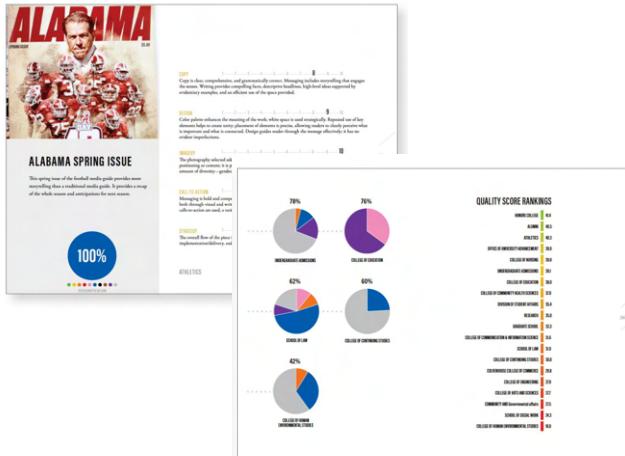
Our competitive analysis deeply explores your positioning against your direct competitors—schools with whom you most highly compete for applications. We place ourselves in the position of a student, absorbing all available communications they might find through search engines, websites, advertisements, and relevant print publications. Each profile—yours and your competitors’—examines narrative positioning, messaging, and storytelling tactics.

Discover which value propositions and storylines Drake should lean into most heavily to differentiate from top competitors.

## KEY INSIGHTS:

- Rise above the noise with our proprietary personality analysis. We uncover the quality of your college or university’s current brand storytelling and empower you to better express your narrative.
- We analyze multiple platforms to reveal channel-specific trends and traps and equip you to avoid common pitfalls across your own.
- We identify where an unclaimed marketing opportunity exists and how to evolve your position and reshape your campaigns to claim it.

# Collateral Analysis



With our collateral analysis, we bring our higher education expertise combined with our first hand creative agency experience to your marketing and communications table.

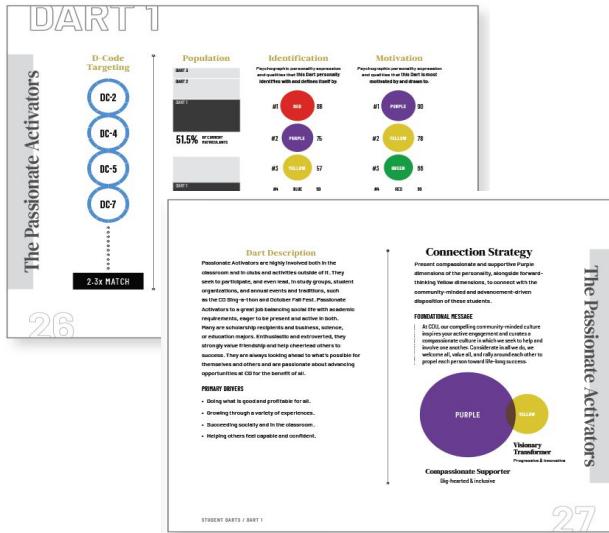
We assess an allotted amount of your high-impact and high-volume print pieces against a rubric of industry-wide best practices and personality-rooted storytelling techniques to provide actionable feedback on visuals and editorial.

Our summary observations, product rankings, charts, and recommendations will provide a big-picture view and help you prioritize areas and collateral that could lean into [Drake's recently completed messaging platform](#) more boldly.

## KEY INSIGHTS:

- A comprehensive approach to marketing and communications strategy, leveraging both industry knowledge and creative storytelling techniques.
- Review of either 6, 8, or 10 pieces of collateral.

# Psychographic Darts



You are well aware of the high expectations of the students you recruit—**Motivators** is Carnegie's national student research bringing you closer to more emotive communication meant to increase engagement at each phase of the search process.

With our deep knowledge of who Drake University is, with recently completed research and build of new messaging platform, it is more important to prioritize understanding your students and why they are attracted to who you are; leaning into each storyline differently during increased segmented communication.

## KEY FEATURES:

- Demographic cluster analysis:** custom analysis of your specific enrollment data and Carnegie's proprietary database of 250 million people across a wide variety of demographic variables.
- Student psychometric workshops:** interactive workshops to capture your student's psychometric characteristics with who knows them best, your currently enrolled undergraduate students.
- Quantitative survey:** sent to your undergraduate student population to verify the psychometric and demographic alignment to create your custom Dart profiles.
- Dart Strategy Deliverable:** cluster analysis, Dart workshop, and survey findings, along with guidance on how to strategically communicate and market to your custom Dart profiles. Monthly unlimited prospective student records tagging of Dart profiles.
- Dart Application Guide:** We'll create a guide demonstrating how to market effectively to identified Darts through message samples and stock and client image selections. This internal tool will empower your professional communicators to create psychographically segmented materials with confidence.
- Training** following the presentation of Darts Strategy Deliverable.

# Slate Executive Audit

The Executive Audit is a comprehensive evaluation designed to assess the utilization, efficiency, and effectiveness of your Slate instance. Over the course of a 2-month project duration, our team of experienced consultants will conduct a thorough analysis of key Slate modules and functionalities to identify opportunities for optimization and improvement.

## KEY SLATE MODULES:

- **Deliver**
- **Rules & Automations**
- One 75-minute project call reviewing outline and summary of audit findings and recommended priorities.

Filters [Query Profiler](#) Matching Rows: 846

Exclude Carnegie Messages  Not Exists

Completed, Running, or Scheduled  Exists

Start Date >= 8/1/2023

Filters [Query Profiler](#) Matching Rows: 74

Carnegie Messages  Exists

# Enrollment Communications Assessment

## OBSERVATIONS & RECOMMENDATIONS

In order to take full advantage of these new and emerging challenges, the UA Chancellor levels a new Vice-Chancellor of Enrollment Management with comprehensive control of total enrollment management, including enrollment operations, systems, resources, and communication flow.

The University's enrollment management function has played a critical role in the university's growth and success over the last decade. This shift away from previous decades of industry-wide growth in a highly competitive market share environment has created significant challenges for the UA to maintain a market leader. UA will need to substantially rethink the scope and scale of its enrollment management operation and implement a more robust enrollment communications flow strategy.

Leverage results and recommendations of completed Slate Audit and review organization and efforts of outreach to all undergraduate audiences. Review and assessment of operations, systems, resources, and communication flow, including frequency, timing, channel strategy, and segmentation.

The analysis will cover all relevant subject areas within enrollment operations and communications. A detailed report inclusive of summary insights and recommendations as well as specific insights and recommendations for each subject area will be provided. Adjustments to any communication Carnegie-run will be completed following review and approval of recommendations post-assessment.

## KEY INSIGHTS:

- 4-7 hours of analysis meetings conducted on-site or virtually. Documents for analysis collected prior to analysis meetings.
- One-hour virtual presentation of the resultant deliverable
- Report provided in PDF, to include executive summary, trends, and insights/recommendations for all subject areas analyzed

# One-Time Investment

## ● Competitive Analysis

Explore your positioning against your direct competitors.

Includes 6 competitors. **\$23,500**

## ● Collateral Analysis

Lean into Drake's recently completed messaging platform more boldly with reviewed collateral with your messaging platform in mind.

6 pieces: **\$5,880** 8 pieces: **\$7,840** 10 pieces: **\$9,800**

## ● Psychographic Dart Research, Training, Tagging, and Guide

Capture your student's psychometric characteristics and leverage in segmented communication and ads.

Development of student dart research inclusive of on-campus workshops and deliverable. **\$63,800**

Unlimited Annual Tagging **\$18,000**

Dart Application Guide **\$11,500**

## ● Slate Executive Audit

Complete a comprehensive evaluation designed to assess the utilization, efficiency, and effectiveness of your Slate instance.

Audit inclusive of Deliver and Rules & Automation Module review. **\$25,000**

## ● Enrollment Communications Assessment

Review and assessment of operations, systems, resources, and communication flow, including frequency, timing, channel strategy, and segmentation. **\$31,700**

# Search and Slate Efforts

# Lead Generation CollegeXpress

## '23-'24 STRATEGIES

- 5-State Select (IA, IL, MN, WI, CO)
- Rising Senior Campaign
- So/Jr Campaign

## RECOMMENDED '24-'25 STRATEGIES:

- 10-State Select (IA, IL, MN, WI, CO, TX, KS, MO, NE, ND, SD)
- Custom Outreach via Connect
  - 10 custom emails written and executed in CX database by Carnegie team.
- Premier Placement Ad on CollegeXpress.com website

Access to 6 million+ active prospective students and parent. Year-round and unlimited lead generation, including early pipeline development. Connecting with prospective students at every stage of their journey is more challenging than ever before.

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions. Averaging ~ **14% first source contribution** to enrolled classes, making it **two to three times more effective** than any other source.

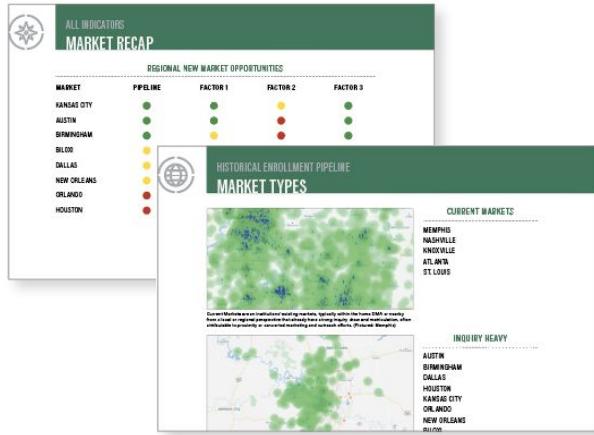
## KEY INSIGHTS:

- Custom outreach via **CollegeXpress Connect**
  - Search for and conduct custom outreach to prospects and their parents whenever you want.
  - Up to 250,000 outreach credits available
  - Suppression lists can be utilized
- Premier Placement
  - full-page ad on CollegeXpress.com for your school complete with copy, logo, images, and a customized RFI form.

Targeting parameters inclusive of, but not limited to both with Premier Placement Ad and CollegeXpress Connect:

- Top College Choices
- Graduation year
- Academic interest
- Athletic interest
- Geography (zip code, high school)
- Self-reported GPA

# Name Buy and Enrollment Consultation



Continue to receive recommendations and support around Drake's **name-buy strategy, diversifying sources** based on your **enrollment data, market research, and channel analysis** to ensure that your selections are precise and have the highest likelihood of conversion.

## KEY INSIGHTS:

- Built on historic enrollment data, market research, and a channel analysis your model will reflect an ecosystem approach to recruitment
  - Student Search criteria and recommendation will consider demographic, academic, socioeconomic, and source variables
  - Our recommendation will be data-driven and consider national trends, recruitment opportunities, and comprehensive sourcing options
- Inclusion of proprietary market research through our powerful Market Opportunity Index (MOI) study that provides you with access to rich data like household income, racial diversity, and a powerful higher ed index for opportunity identification, audience prioritization, and marketing execution.
- Agile and modern, our purchasing strategy includes multiple executions and ongoing monitoring for optimization

\*we offer name buy consultation packages for first-year underclassmen, undergraduate transfer, and graduate.

# Slate Full Lifecycle Communication

The screenshot shows the slate software interface with the following details:

- Campaign Metrics Report**
- Folder:** Undergraduate
- Current as of:** 09/21/2021 at 12:44:41 PM ET
- Status:** Completed successfully.
- Export Options:** Export to PDF, Export to Query
- Senior Search - Funnel:**
  - Applications:** Prospects, Inquiries, Created, Submitted, Completed, Accepted, Deposited, Net Degree..., Inquiry, App Create..., App Subm..., App Comm..., Accept Rate, Yield Rate, More...
  - Conversion Rates:** % Prospect to Application, % Application to Acceptance, % Acceptance to Yield, % Yield to Enrollment
- Dart Breakdown / Person Data:**

| Dart   | Prospects | Inquiries | Created | Submitted | Completed | Accepted | Deposited | Net Degree... | Inquiry | App Create... | App Subm... | App Comm... | Accept Rate | Yield Rate | More... |
|--------|-----------|-----------|---------|-----------|-----------|----------|-----------|---------------|---------|---------------|-------------|-------------|-------------|------------|---------|
| Dart 1 | 15,628    | 68        | 38      | 217       | 42        |          |           |               | 42%     | 38%           | 80.97%      | 19.35%      | .00%        |            |         |
| Dart 2 | 15,749    | 29        | 22      | 17        | 4         |          |           |               | 43%     | 24%           | 75.95%      | 19.00%      | .00%        |            |         |
| Dart 3 | 18,635    | 89        | 42      | 37        | 7         |          |           |               | 48%     | 23%           | 73.07%      | 23.00%      | .00%        |            |         |
| Dart 4 | 27,875    | 85        | 57      | 47        | 7         |          |           |               | 30%     | 20%           | 82.46%      | 14.89%      | .00%        |            |         |
- Market Breakdown / Person Name Buy Market:**

| Market    | Prospects | Inquiries | Created | Submitted | Completed | Accepted | Deposited | Net Degree... | Inquiry | App Create... | App Subm... | App Comm... | Accept Rate | Yield Rate | More... |
|-----------|-----------|-----------|---------|-----------|-----------|----------|-----------|---------------|---------|---------------|-------------|-------------|-------------|------------|---------|
| Core      | 5,746     | 32        | 16      | 11        | 2         |          |           |               | 56%     | 28%           | 68.75%      | 18.18%      | .00%        |            |         |
| Secondary | 43        | 20        | 17      | 3         |           |          |           |               | 46%     | 21%           | 85.00%      | 17.65%      | .00%        |            |         |
| Tertiary  | 2,362     | 2         | 1       | 1         |           |          |           |               | 20%     | 10%           | 100.00%     | .00%        |             |            |         |

Build upon and increase Drake's audience segmentation through the inclusion of additional academic breakouts and either the continuation of leveraging Carnegie Motivators or Drake's custom student Darts.

## CAMPAIGNS RECOMMENDED

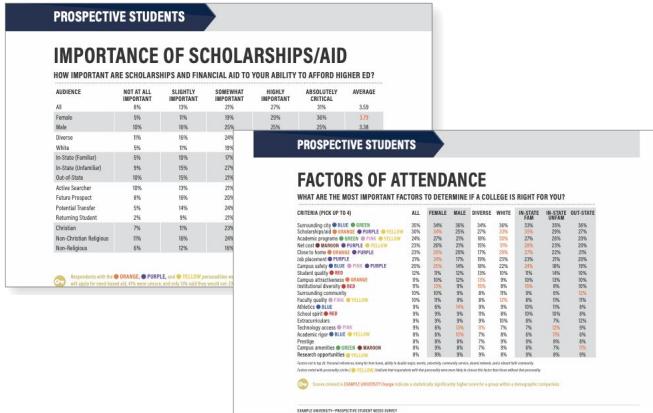
- Refreshed Darted Senior Search
  - Additional academic segmentation
- Refreshed Darted Senior Application Generation
- Refreshed Darted Senior Yield
- Refreshed Darted Senior Anti-Melt
- Refreshed Darted Sophomore/Junior Search
  - Additional academic segmentation
- Refreshed Search Landing Page
- **Parent/Guardian Campaign (new)**
- **Transfer Population-Specific (new)**
- **Bright College Population Specific (new)**

\*No print planned for any drip campaign

\*No cost difference between segmentation by Motivator or Dart

**Note:** Additional academic segmentation planned for within search campaigns. Undefined additional 50 segmentations available throughout campaign execution.

# Admitted Student Research



Understanding student matriculation is a multi-layered process. While demographic differences tell some of the story, creating a direct conduit of feedback from those students who accepted an offer and comparing that to students who did not accept offers unparalleled insights for planning for future cycles and even retaining matriculants. Carnegie works with institutions to achieve this goal by designing, hosting, and analyzing an Admitted Student Research. With a mix of quantitative scoring metrics and qualitative open-end responses, this research adjusts to industry and student trends while creating actionable outcomes.

## KEY INSIGHTS:

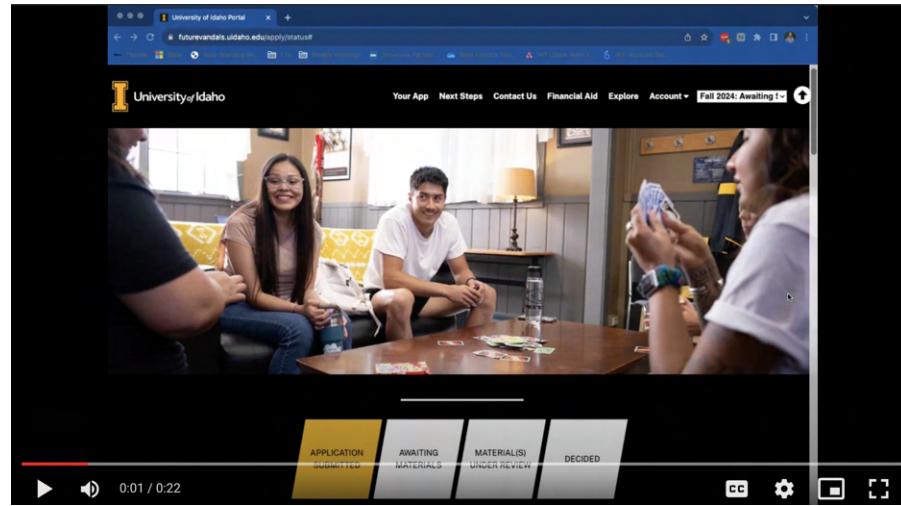
- Gather information about your current senior student's motivation and drive to uncover what personality types Drake is serving well or turning away.
- Additionally it covers a measure of institutional choice, financial aid needs, communication feedback, and an assessment of how well your institution met their school criteria.
- Results are compared against their top alternative school (for those who matriculated) or the school they ultimately selected.

# Dart-Based Admitted Student Portal

## KEY INSIGHTS:

- Impress all your critical audiences—from anonymous visitors, applicants, current students, and donors to parents, Slate users, external stakeholders, and more—with a **personalized experience in a dedicated portal**.
- Portals are **designed by our award-winning creative team**, but they are then built by our best-in-industry Slate developers.
- Combining flash and function, our **dynamic portals drive engagement in each interaction**, no matter the end user.

Drake's custom dart-based admitted student portal will meet your exact needs and specifications. We build your portal from scratch, using web best practices like dynamic content and on-brand design. Our reporting, often delivered via a portal, is digestible and visually appealing to ensure the very best experience for every audience. We're setting the industry standard—bring us any portal or reporting project, and we'll exceed your audience's expectations.



[Sample Admitted Student Portal](#)

# Enrollment Recommendations

## **CollegeXpress**

Connect with prospective students at every stage of their journey.

10-State Select: **\$20,000** CollegeXpress Connect: **\$5,000** Featured Site Ad: **\$5,000**

## **Full Lifecycle Communication + Name Buy Consultation**

Continue to build upon a solid communication foundation; leverage Carnegie's name-buy and enrollment strategy to assist in the execution of intentional and segmented drip campaigns. Incorporation of additional academic and undefined segmentation. Development and execution of intentional communication with parents of current seniors, prospective transfer students, and prospective Bright College students.

Full Lifecycle Communication **\$182,700**

Name Buy and Enrollment Consultation **\$24,500**

## **Admitted Student Research**

Gather information about your current senior student's motivation and drive to uncover what personality types Drake is serving well or turning away. **\$4,000**

## **Dart-Based Admitted Student Portal**

Custom Application Status portal segmented with Darts designed to serve one student population. **\$27,000**

\*Total spend: \$268,200 (\$24k+ less than previous cycle)

# Paid Media Recommendations

# Digital Strategy Overview

Goal: Increase inquiries and overall enrollment targeting prospective undergraduate students, prospective transfer, and prospective Bright College students.

Strategy: We've outlined integrated digital recommendations inclusive of display, paid search, and conversion-focused paid social media strategies. This plan is mindful of budget and utilizes foundational strategies that insert Drake University at critical moments during students' online search process to drive awareness, inquiries, and application activity. It incorporates your feedback in terms of durations, and priority program campaigns (edits are displayed in blue in the spreadsheet linked below).

Strategy Highlights: .

- + Utilizing TikTok and Snapchat to generate both awareness and inquiries for prospective undergraduates.
- + Leveraging PPC to generate inquiries from mid-funnel users who are actively searching your keywords for general undergraduate, and priority programs.
- + Incorporating the always-on tactics of Display Retargeting campaigns (Bright College, Transfer, Undergraduate) to drive application behavior for those who have visited key web pages on your site
- + Inclusion of IP Targeting pushing apply and yield messaging to respective lists.
- + Create a personalized experience for users on your website in real time based on their area of interest and position in the enrollment funnel utilizing Carnegie Clarity™

**Note:** These recommendations are fully scalable and adjustable to fit any budget or goals.

[\*\*Full digital plan.\*\*](#)

# Dart Metrics

# Asbury University

Private  
1,400 Students  
Wilmore, Kentucky

- + Brand Strategy
- + Darts
- + Campaign Concepts
- + Video and Photo
- + Senior Search
- + So/Jr Search
- + Financial Aid Strategy

## Measure, Optimize, and see Results:

- + **Increase Inquiry Yield**
  - + 33.5% v. 30.4% the previous year
- + **Increase in Deposits by 20%**
  - + Overall 25% increase in net revenue
- + **Profile**
  - + Class of 2027 boasts highest average GPA
  - + Increase of 5% in representation from students in bordering states

# Case Study Client A Dart Impact

Private R1 University  
2,400 Students  
Western United States

## Measure, Optimize, and see Results:

- + **Increased YOY Deposits**  
+18% Net Deposits (22-23 cycle)
- + **Darted Comms Increased Conversion**  
+17% Better Yield (45% vs 28% non-Darted)
- + **Increased Inquiry Conversion on Darted Names**  
+13% Higher Conversion (app gen)

# Aggregated Metrics

Digital Data  
Darted Metrics

## Measure, Optimize, and see Results:

### + IP Targeting Impact

- + 31% lift in engagement with Dart segmentation
- + Dart segmentation had the biggest impact on Junior and Admit audiences

### + Snapchat

- + 20% lift in engagement with Dart segmentation
- + If used beyond list-based targeting (leveraging behavioral) there is a greater lift of 43%
- + Dart segmentation had the biggest impact on the Junior audience

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# CARNEGIE

210 Littleton Road, Suite 100  
Westford, MA 01886

978.692.5092

[carnegiehighered.com](http://carnegiehighered.com)

[info@carnegiehighered.com](mailto:info@carnegiehighered.com)

# High-Level Budget Summary

| Service  | Scope of Work Summary   | Cost     |
|--|---|----------|
| <b>Custom Psychographic Segmentation:<br/>Carnegie Darts</b> | All currently enrolled undergraduate students clustered plus the past two to four inquiry cycles; 4 workshops for up to 40 undergraduate students per workshop; up to 800 survey completes; 3-4 Darts identified.   | \$63,800 |
| <b>Unlimited Tagging</b>                                     | Unlimited annual Dart tagging for all prospective undergraduate students, tagged once monthly for 12 months.  | \$18,000 |
| <b>Dart Application Guide</b>                                | We'll create a guide demonstrating how to market effectively to identified Darts through message samples and stock and client image selections. This internal tool will empower your professional communicators to create psychographically segmented materials with confidence.  | \$11,500 |
| <b>Enrollment Communications Assessment</b>                  | 4-7 hours of analysis meetings conducted on-site or virtually. Documents for analysis collected prior to analysis meetings, one-hour virtual presentation of the resultant deliverable, and Report provided in PDF, to include executive summary, trends, and insights/recommendations for all subject areas analyzed.  | \$31,700 |
| <b>Admitted Student Research</b>                             | Survey remains open until one month past the Client decision deadline date. Questions in the survey to be selected from a list of more than 100 templated options covering topics such as search behaviors, value propositions, institutional and respondent personality, financial aid, communication tactics, and more. Carnegie team to advise on question selection, build survey form in Slate, manage all communications and incentives, and train the Client on data review tools. Results presented in real time in Slate instance. Major insights and recommendations during the final strategic meeting included. | \$4,000  |

Continued on next page...

# Research and Strategy Investment

| Service                      | Scope of Work Summary   | Cost   |
|------------------------------|---|--|
| <b>Competitive Analysis</b>  | Investigation of your competitive set, examining positioning and storytelling tactics, language themes, tone, style, visual identity, technical considerations, realities, and quality rankings. Insights will reveal opportunities to differentiate from the competition.<br><br>Includes 6 competitor profiles. | \$23,500   |
| <b>Collateral Analysis</b>   | Analysis of 6, 8, or 10 collateral pieces.  | 6 pieces: \$5,880<br>8 pieces: \$7,840<br>10 pieces: \$9,800 |
| <b>Name Buy Consultation</b> | We will deliver a name-buy recommendation and diversified sourcing strategy based on your enrollment data, market research, and channel analysis to ensure that your selections are precise and have the highest likelihood of conversion.  | \$24,500   |
|                              |   | <b>Total:</b> \$182,880-\$186,800                            |

# High-Level Budget Summary

| Service   | Cost                              |
|---|-----------------------------------|
| <b>Research and Strategy</b>  |                                   |
| Custom Psychographic Audience Segmentation (Student Personas). Including:                               |                                   |
| <ul style="list-style-type: none"> <li>- Dart Application Guide</li> <li>- Unlimited Tagging</li> </ul> |                                   |
| Enrollment Communications Assessment  |                                   |
| Admitted Student Research   |                                   |
| Competitive Analysis  |                                   |
| Collateral Analysis   |                                   |
| Name Buy Consultation   |                                   |
| <b>CollegeXpress Strategy</b>   |                                   |
| Undergraduate State Select  |                                   |
| Undergraduate Prospect Database Access  |                                   |
| Featured Site Ad  |                                   |
| <b>Slate Services</b>   |                                   |
| Slate Communication Campaign Bundle   |                                   |
| Slate Executive Audit   |                                   |
| Darted Application Status Portal  |                                   |
|   | <b>Total: \$447,580-\$451,500</b> |

# CollegeXpress Investment

| Service                                       | Scope of Work Summary  | Cost                   |
|---|--|------------------------|
| <b>Undergraduate State Select</b>             | Lead generation campaign to prospective undergraduate students from IA, IL, MN, WI, TX, KS, MO, CO, NE, ND, SD via CollegeXpress platform. Includes database access, CollegeXpress.com profile development, and CRM integration. Campaign duration: 12 months.   | \$20,000               |
| <b>Undergraduate Prospect Database Access</b> | Access to the CollegeXpress database to search for and conduct outreach to prospective undergraduate students and parents. Targeting parameters include: top college choices, graduation year, athletics, majors, location, GPA, gender, religion, and more. 250,000 send limit. Includes 5 pre-written emails for your use. | \$5,000                |
| <b>Featured Site Ad</b>                       | One full-page ad with featured placement on CollegeXpress.com. Includes customizable RFI form for your target audience.  | \$5,000                |
|   |  | <b>Total:</b> \$30,000 |

# Refreshed Undergraduate Campaigns - Darted

## DISCOVERY, SUPPORT & STRATEGY

- Discovery Visit with Carnegie team (on-campus or virtual)\*
- Ongoing project and strategic support provided in the form of 30-minute calls and/or written communication
- Refreshed Campaign strategy and communication plans
- Guidance regarding communication strategy and Slate Deliver best practices
- Insight into Carnegie partner benchmarking data relative to campaign performance and overall conversions
- Annual campaign assessment

## CREATIVE DELIVERABLES

- Refreshed copy for dynamic drip emails and text messages
  - **Senior Search:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed)
  - **Underclassmen Search:** 20 emails for up to three subpopulations (e.g., Junior, Sophomore, Freshman, etc.) (up to 5 emails segmented by Dart and up to 10 additional segments as needed)
  - **Application Generation:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed) and five text messages
  - **Yield:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed) and five text messages
  - **Anti Melt:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed) and five text messages

## CREATIVE DELIVERABLES

- A bank of up to 12 ad-hoc emails to be used for strategic recommendations or pivots for any population with which we are communicating
- Refreshed design for three email templates and 10 additional email header designs
  - Two standard-style (including header, footer, and one variable CTA button) and one newsletter-style (including multi-section layouts featuring various imagery, and graphic elements)
  - One email header design per Dart/Motivator
  - One additional email header design per campaign

## CAMPAIN DELIVERY & ANALYSIS

- Slate Campaign Execution
  - Refreshed Population and rule configuration
  - Template import and mobile responsiveness testing
  - Email and recipient list builds
  - Refreshed Strategy and configuration for up to one form per full campaign
- Refresh for One Slate-hosted Campaign Performance & Conversion Slate report per campaign
- Refresh for One Slate-hosted Funnel & Conversations Report

## SEARCH LANDING PAGE

- One refreshed Slate-hosted landing page portal including:
  - One branded header image segmented by Dart/Motivator
  - One personalized greeting segmented by Dart/Motivator
  - One informative content section
  - One facts & figures content section
  - Embedding of one RFI form
  - One branded footer
- Conversion metrics included in communications reporting

# New Additional Campaigns - Unsegmented

## SUPPORT & STRATEGY

- New campaign strategy and communication plans
- Guidance regarding communication strategy and Slate Deliver best practices
- Insight into Carnegie partner benchmarking data relative to campaign performance and overall conversions
- Annual campaign assessment

## CREATIVE DELIVERABLES

- Copy for dynamic drip emails and text messages
  - **Parent/Guardian:** Copy for 15 emails for up to three subpopulations or statuses
  - **Transfer:** Copy for 15 emails for up to three subpopulations or statuses
  - **Bright College:** Copy for 15 emails for up to three subpopulations or statuses
- A bank of up to 9 ad-hoc emails to be used for strategic recommendations or pivots for any population with which we are communicating
- Design for three email templates and 6 additional email header designs
  - Two standard-style (including header, footer, and one variable CTA button) and one newsletter-style (including multi-section layouts featuring various imagery, and graphic elements)
  - Two additional email header designs per full campaign

## CAMPAIN DELIVERY & ANALYSIS

- Slate Campaign Execution
  - Population and rule configuration
  - Template import and mobile responsiveness testing
  - Email and recipient list builds
  - Strategy and configuration for up to one form per full campaign
- One Slate-hosted Campaign Performance & Conversion Slate report per campaign
- One Slate-hosted Funnel & Conversions Report

# Slate Campaign Bundle

| Service                                  | Scope of Work Summary  |
|--|--|
| Refreshed Darted Senior Search           | 15 emails (up to 20 segments total) with header swaps                          |
| Refreshed Darted Sophomore/Junior Search | 10 emails (up to ten segments total) with header swaps                         |
| Refreshed Search Landing Page            | One refreshed Slate-hosted landing page portal                                 |
| Refreshed Darted Application Generation  | 15 emails (up to 20 segments total) and five text messages with header swaps   |
| Refreshed Darted Yield                   | 15 emails (up to 20 segments total) and five text messages with header swaps   |
| Refreshed Darted Anti-Melt               | 15 emails (up to 20 segments total) and five text messages with header swaps   |
| Parent/Guardian Campaign                 | 15 emails (up to 20 segments total) and three subpopulations with header swaps |
| Transfer Population-Specific             | 15 emails (up to 20 segments total) and three subpopulations with header swaps |
| Bright College Population Specific       | 15 emails (up to 20 segments total) and three subpopulations with header swaps |
| Additional Segmentation                  | 50 additional segments to be used for any campaign                             |
|  | Total: \$182,700   |

## Darted Application Status Portal

---

- One Slate query library to define applicant statuses and populations
  - Custom CSS styling, HTML, and necessary Javascript based on brand standards
  - Home Page containing portal elements:
    - Navigation bar
    - Welcome text (customized per status)
      - Darted for admitted and deposited students
    - Visual representation of Application Status
    - Application details section (e.g., start term, intended major, application status, etc.)
    - Up to three test score displays
    - Custom application materials checklist section
    - Custom upload materials section
    - Custom decision release section
    - Custom post-admission checklist section
    - Custom payment section
    - Portfolio Widget (via Slate-hosted functionality)
    - Application proof
    - Contact Us section (with staff assigned or general contact info)
    - Resources section (up to 5 external links)
    - Event registration section with student's current registration and up to 2 event categories per population
    - One priority event call out section template
    - Social links
    - Account Tools
    - Application selector Widget (via Slate-hosted functionality)
    - Application submission confirmation Widget (via Slate-hosted functionality)
    - Footer
  - Update Info Page containing portal elements:
    - Update Contact Info form
    - Deferral and/or Withdrawal Request form
- 

### APPLICATION STATUS PORTAL PACKAGES AND SUPPORT

#### BASIC

- *Designed to serve one population (e.g. Undergraduate, Graduate, Non-traditional) with up to three segments.*
- *20-week project duration*
- *Up to six project calls*

**\$27,000**

### Application Status Portal Enhancements

**Portal enhancements can be added for a cost of \$1,000 per enhancement.**

- Decision released splash screen
- Financial aid dynamic content
- Up to three calls to action
- Self-service post-admission checklist form
- Up to three material displays (e.g., transfer credit evaluation, scholarship letters, etc.)
- Up to three FAQ displays (not including creation of questions and/or topics)
- Variable academic content
- One custom media display
- One pop-up photo/video/notification
- Custom enhancement

# Slate Investment

| Service                      | Scope of Work Summary   | Cost             |
|------------------------------|---|------------------|
| <b>Slate Communications</b>  | Custom full cycle Slate Communication bundle included refreshed, dart-segmented, and new campaigns. Also includes additional segmentation to be used for campaigns.   | \$182,700        |
| <b>Slate Executive Audit</b> | One 75-minute discovery call, one 75-minute project call reviewing outline and summary of audit findings and recommended priorities and one 75-minute post-summary call. Assessment will include two priority Slate Modules (Deliver & Rules & Automations) | \$25,000         |
| <b>Slate Portal</b>          | Custom Application Status portal segmented with Darts designed to serve one student population.   | \$27,000         |
|                              |   | Total: \$234,700 |

# Massasoit Community College

PROPOSAL

RFP #2024-01  
Integrated Marketing  
Services



# CLARUS is excited to offer a proposal in response to Massasoit Community College's request for digital marketing services!

John Caffelle  
Director of Administrative Services

Thank you for the opportunity to submit a proposal for integrated marketing services to support enrollment growth!

Our hope is to be a sole-source strategic partner who delivers a comprehensive range of advertising and marketing services, including, but not limited to, audience-specific strategic multi-channel marketing aligned with the College's goals. Ultimately, we will ensure that every communication touchpoint supports enrollment growth outlined by the College.

Massasoit Community College has previously engaged in a digital partnership with our parent company, Carnegie. Now we are excited to reimagine a partnership infused with CLARUS' proven strategies as the leader in community college digital marketing.

## Working with us, you'll:

### **Have a partner who knows community colleges.**

Since 1988, our primary focus has been assisting community colleges in knowing their communities, serving their constituents, and understanding their audiences. We have achieved excellence by helping organizations boost their enrollments, even in the midst of a pandemic. Because our team members have worked in community colleges ourselves, we know your challenges and your markets – and we know how to reach your audiences.

**Receive expertise and capacity where you need it most.** Recognizing that each institution possesses distinct capacities and talents, our solutions are tailored to each community college with whom we partner. Our team comprises experts in creative, marketing, web design, SEO, digital technologies, CRM, communications, research, and consulting. We can seamlessly integrate with your team, filling in any gaps and enhancing your existing talents. Our extensive pool of skilled professionals also enables us to quickly adapt to emerging challenges.

**Embrace a philosophy and approach that are markedly different and fundamentally better than the prevailing standard.** We've always led with innovation, constantly seeking what's next for community colleges. We were the first to introduce addressable geofencing to our clients and have developed groundbreaking methods for measuring ROI on digital campaigns. Currently, we're working with clients to integrate AI into daily tasks to enhance productivity. In a world where tools and systems are increasingly vital, we've remained on the cutting edge of technology integration. Please know our team will bring this level of enthusiasm and expertise to our partnership with you.

As you review our proposal, please contact me at the number below if you have any questions or would like additional information. Hopefully, this proposal will serve as a springboard for further conversation and collaboration – we'd love to tailor our approach to your needs.

Sincerely,



Kristy Phillips, Ed.D.  
Senior Director, Client Success  
661.304.0884  
[kphillips@claruscorporation.com](mailto:kphillips@claruscorporation.com)



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# Scope of Services

# Your Goals Are Our Goals

Our primary aim in this proposal is to inspire you with fresh strategies and approaches across all channels in order to increase ROI, reach desired audiences, and meet your overall enrollment goals:

- ◆ Increase **institutional brand awareness**.
- ◆ Increase **inquiries, applications, and enrollment** of target students across core markets.
- ◆ Generate **quality leads that convert** to applications and enrollments.
- ◆ Increase **awareness among** those who influence traditional students' college choice, including **parents and families**.
- ◆ Increase **retention rates** among existing students.

# CLARUS at a Glance

For 35 years, CLARUS has been a leader and innovator in community college marketing and enrollment strategy. We offer groundbreaking services in the areas of research, enrollment strategy, and software solutions. In 2015, CLARUS opened its Digital Marketing Division to assist community colleges in an audience-based approach to increasing enrollments.

## **Unique Institutions, Unique Solutions**

CLARUS was the first firm to focus exclusively on the community college market. We have a deep understanding of the challenges that community colleges face in today's complex market landscape, and we recognize that although these challenges may be universal, the solutions for each institution must be tailored to the characteristics of their individual service areas.

## **Providing ROI**

In every campaign we run, we assess ROI not through typical metrics but also by tracking total applications generated and enrollment numbers resulting from our initiatives. This data is accessible via a live reporting dashboard for total transparency and accountability regarding the funds invested in enrollment efforts.

## **Data-Driven Recommendations**

We embody a personalized, focused, and tailored approach to address the distinct enrollment needs and challenges of each client. Our experienced team of former community college marketers thoroughly assesses your strategic, enrollment management, and marketing plans, along with other pertinent data, to ensure our recommendations and strategies are in sync with your priorities.

**1988**

The year our company  
was founded

**12**

The number of higher  
education organizations  
we partner with annually,  
including NCMPR,  
CCPRO, NSCEC, NACTC,  
ACCT, TACCM, and  
EdAmerica

**2.25B**

The number of digital  
ads delivered for our  
clients

**150+**

The combined years of  
work experience in  
community colleges  
across our staff

**250,000+**

The number of student  
interviews conducted for  
custom research

**45**

The number of states  
represented by our partner  
institutions

**571**

The number of  
community colleges we  
have served

**4.42M**

The number of student  
visits generated to our  
community colleges

**15**

The number of major  
conferences we present  
at annually

# A CLARUS Difference

Founded in 1988, CLARUS has pioneered the focus on community college marketing. With a portfolio of over 25,000 digital campaigns, CLARUS stands as the premier digital marketing expert for community colleges today, helping our clients leverage digital marketing strategies to achieve their application, enrollment, and retention goals. Here's what sets us apart!

## DATA-DRIVEN APPROACH

We leverage enrollment insights, audience data, campaign metrics, and website analytics to inform all our digital marketing strategies for our clients. We use this data to identify trends, target audiences, and measure the success of campaigns.

## CUSTOMIZED SOLUTIONS

Although every community college may have similar challenges, the campaigns and messaging for those colleges should be very different, tailored to their specific landscapes. We focus on understanding your unique market audience and creating digital marketing solutions – including personalized messaging, targeted advertising, and unique campaign strategies – to meet your specific needs and goals.

## INDUSTRY EXPERTISE

Over the last 30 years, we've worked with more than half of the community colleges in the country to identify marketing and enrollment opportunities.

## AUDIENCE-CENTRIC PLANNING

Unlike traditional ad agencies that purchase platform space and then search for an audience, we develop plans by first identifying target audiences and then selecting the platforms that best reach those groups.

## FOCUS ON BOTTOM-LINE ROI

We go beyond the basic metrics of impressions, clicks, and cost-per-click. Our goal is to increase meaningful actions, including visits to campus and interactions on websites. By taking these measurements into account, we can focus on cost-effective strategies that yield measurable results.

## INNOVATIVE TECHNOLOGIES

We utilize cutting-edge technologies and tools to enhance our digital marketing efforts. We integrate AI and machine learning to better target segments, create ads, automate elements of campaign management, and analyze performance data ... all to deliver the best ROI for you.

# Expertise & Partnerships

CLARUS has established deep partnerships with industry leaders including Google, Meta, Simpli.fi, Snapchat, and TikTok. Dedicated partners across these major media platforms support our team by sharing the latest trends in technology and digital marketing, troubleshooting and making recommendations for our campaigns, presenting opportunities to beta-test new products and features, delivering insight into local and national trends, and providing exclusive access to platform-specific trainings/webinars.

We participate in many industry associations (like CES and the Digital Summits) to stay abreast of new trends in the digital industry, as well as the community college associations (ACCT, AACC, NCMPR, TACCM, and CCPRO) to continue to understand community college trends and student behavior. We utilize the insight we gain from these connections to make better decisions for our clients.



Association of Community  
College Trustees



American Association of  
Community Colleges



National Council for Marketing  
& Public Relations



Texas Association of  
Community College Marketers



California Community Colleges  
Public Relations Organization

PREMIER

Google  
Partner

Each year, Google recognizes the achievements of top-performing digital marketing partners across the globe by awarding Premier Partner status. **Only 3% of Google Partners achieve this honor.**

Our Google partnership benefits you in the form of expertly trained staff, dedicated Google account and technical support, and early access to exciting beta products. Additional benefits include competitive spending analysis reports, quarterly education trends reports, and more.

# Everything You Need

We provide a complete range of services to meet your needs. With CLARUS, you'll have one team that's fully equipped to serve as your partner, trusted advisor, and "make the magic happen" resource.

## RESEARCH + CONSULTING

- ◆ Two-Year Community Perception Scan
- ◆ Market Scan
- ◆ Student Journey & Communications Audit
- ◆ Predictive Modeling of Enrollment Propensity

## BRAND + CREATIVE

- ◆ Brand Personality Foundation
- ◆ Photography and Videography Production Package
- ◆ Viewbook Production
- ◆ Static and Animated Display Banner Creative Production
- ◆ Landing Page Production and Hosting
- ◆ Content/Email Writing

## DIGITAL MARKETING

- ◆ Search Engine Marketing (PPC)
- ◆ Geofencing and Addressable Geofencing (to 25 square feet)
- ◆ Event Capture
- ◆ Programmatic Display
- ◆ Remarketing
- ◆ Social Media (Meta, Snapchat, LinkedIn, TikTok)
- ◆ Streaming Video (YouTube, ConnectedTV, Twitch)
- ◆ Streaming Audio (Spotify, iHeartRadio, Pandora)
- ◆ Podcasts
- ◆ Lead Generation
- ◆ Content Marketing
- ◆ Google Analytics
- ◆ Search Engine Optimization (SEO)
- ◆ Google Business Profile Optimization
- ◆ Website Design and Development
- ◆ WebID
- ◆ Email Strategy

# Quality Requirements

# Four Phases

Our approach to your project will be clear and methodical, with each step building on our previous efforts.

One of our major goals in partnering with you is to take the guesswork out of enrollment and create a seamless partnership.



## STEP ONE: IDENTIFY AUDIENCES

**Develop student personas** to represent your target audiences.

**Create audiences** based on your historical enrollment data we will match your data to 330 million households in the US defined by offline and online behaviors to find prospective students in your service area with these personas. Through targeted lists, we will reach individuals who match your audience criteria at a household level.

## STEP TWO: DEVELOP STRATEGIES

**Recommend platforms and tactics that align with your target audience**, tailored to the personas identified for your institution, considering demographic, behavioral, and lifestyle characteristics.

**Deliver detailed segment characteristics** (demographic, behavioral, and psychographic) that allow us to fine-tune our targeting and select the platforms and tactics best suited to reach your audience.

**Provide a digital plan** to include audience size, messaging, programs to be promoted, campaign duration, budget needs, creative assets, and key platforms for effectively reaching audiences and achieving the necessary impressions.

## STEP THREE: DEPLOY PLANS

**Provide a detailed checklist** outlining all assets needed to ensure a smooth and timely launch of campaigns. Our best-in-class higher education writers and designers will create digital ads on your behalf, across all applicable platforms, with all ads being sent for your review and approval before anything is pushed live.

**Build and launch the campaign** within one to two business days of receiving all necessary assets.

## STEP FOUR: MEASURE & OPTIMIZE

**Meet bi-monthly** to review current campaigns, plan upcoming campaigns, and keep abreast of any changes at the College.

**Provide a live dashboard** for 24/7 reporting of campaign performance and metrics.

**Monitor client campaigns daily**, manage creative and addressable list updates, and assist with digital reporting.

**Optimize campaigns based on KPIs like** impressions, click through rates, conversions and view through conversions to your website and landing pages. If any of these are underperforming, we may suggest changes to boost performance.

# Question One

**Provide a representative sampling of three or more media plans and media buys that have been produced for higher education clients.**

## EXAMPLE ONE:

This community college is located in the Southeast and has five campuses and other centers/locations across four counties. Annually, the College has just under 14,500 students enrolled, with ~4,500 degrees awarded annually. The College has an annual budget of \$250,000 to \$300,000 and partners with CLARUS to run annual brand, programmatic, and audience-specific marketing campaigns to increase enrollment. The College has specific enrollment goals focused on programmatic pathways, high school students (and parents), adult learners/some college, no degree, funnel support to ensure current students register for future terms, Hispanic households, Veterans, and Law Enforcement.

## Strategy Highlights:

**Branding and Awareness:** Branding and awareness strategies are deployed as an “always-on” tactic to build lasting affinity and, ultimately, enrollment with the College. Monthly, we deploy Google Ads PPC to ensure the College is in front of users who are actively searching for educational opportunities.

We deploy Connected TV directly into adults' homes with high school-aged students (ages 13 to 18), delivering branded content to reach those seeking an education and influencers. We also run retargeting ads and deploy Web ID to re-engage with traffic that has visited the College's website. Retargeting has allowed us to follow up with stronger calls-to-action (CTAs), such as open house visits and enrolling for upcoming terms. WebID allows us to identify visitors to the College's website by name and address. This allows us to place digital ads within those homes then to promote academic pathway digital campaigns. This College is also part of an athletic conference, so we deliver paid television and online ads during the Conference's football games in the College's service area.

**Programmatic Digital:** This media plan highlights how we delivered audience-specific digital ads on mobile phones in apps and websites that accept advertising and cross-device to laptops, desktops, tablets, etc.

- **High school seniors and COVID seniors:** We Geofence the local high schools while also building a digital audience through our digital provider to specifically target the homes with current high school students within the service area.

We also specifically targeted Hispanic households by building an audience of households with Spanish listed as the primary language spoken in the home. COVID Seniors are comprised of high school seniors who graduated in 2021 and 2022, who were not participating in any form of education.

- **Funnel Campaigns:** We took lists of applicants, current students, and Stop-Outs and geofenced those homes to deliver audience-specific ads encouraging students to enroll for the upcoming term. The Stop-Out list was created using past enrollment data of students who had previously enrolled but had not for several terms. These campaigns ran throughout the year to support Fall, Spring, and Summer enrollment.
- **Program Pathways:** Audiences included adults, Veterans, and Hispanics where applicable. The College has eight academic pathways that we ran digital and video ads for to support key programs or workforce/technical programs that the College offers. We build these audiences through demographic audience information and past search history to build an audience of prospects with a higher propensity to enroll in the designated academic program.

# Question One

## EXAMPLE ONE: 23-24 ANNUAL PLAN

| Audience                    | July   | August | September  | October   | November | December   | January | February  | March | April | May   | June |
|-----------------------------|--|--------|--|---|----------|--|---------|---|-------|-------|---|------|
| Individuals in Service Area | Branding & Awareness: Paid Search, CTV, Monthly Retargeting, WebID |        |  |   |          |  |         |   |       |       |   |      |
| Stopouts                    | Fall Push / Geofence Homes   |        |  | Spring Push / Geofence Homes  |          |  |         |   |       |       | Summer Classes Push / Geofence Homes  |      |
| High School                 | Seniors / Geofence   |        |  | Seniors & Dual Enrolled / Push Scholarships & FAFSA / Geofencing & Social |          | Seniors & Dual Enrolled / Push Promise & Rejections at 4-Year / Geofencing Homes, Snapchat, TikTok,FB/IG |         | Seniors & Dual Enrolled / April to June - Geofence Graduations, FB, Newspaper, Television June to July - Push Summer & Fall, Continue to Geofence |       |       |   |      |
| Current Students            | Fall Push / Geofence Homes   |        |  | Spring Push / Geofence Homes  |          |  |         |   |       |       | Spring 21, Fall 21 Enrollees Not Enrolled, Spring 22 / Summer Classes Push / Geofence Homes |      |
| University Students         |  |        |  |   |          |  |         |   |       |       | Summer Classes Push / Geofence Freshmen/Sophomore Homes, Other Universities                 |      |
| Adults                      |  |        | SEC Football Games / Television & Online Ads in Service Area |   |          |  |         |   |       |       |   |      |

# Question One

## EXAMPLE ONE: 23-24 ANNUAL PLAN CONT'D

| Audience                            | July                                     | August | September | October   | November | December | January | February   | March  | April | May | June |
|-------------------------------------|--|--------|-----------|---|----------|----------|---------|--|--|-------|-----|------|
| Adults - High School & Some College | Push Fall / Audience Builder, Geofencing |        |           |   |          |          |         |  |  |       |     |      |
| Arts & Humanities Pathway           |  |        |           | Spring Push / Audience Builder, Behavioral Targeting, Geofencing Locations, Social Media                                    |          |          |         | Fall Push / Various Digital, Video, Social Media |  |       |     |      |
| Business/Hospitality Pathway        |  |        |           | Fall Push / Audience Builder, Behavioral Targeting, Geofencing Locations, Social Media                                      |          |          |         |  | Fall Push / Various Digital, Video, Social Media |       |     |      |
| Education Pathway                   |  |        |           | Fall Push / Audience Builder, Behavioral Targeting, Geofencing Locations, Social Media                                      |          |          |         | Fall Push / Various Digital, Video, Social Media |  |       |     |      |
| Health Sciences Pathway             |  |        |           | Fall Push / Audience Builder, Behavioral Targeting, Geofencing Locations, Social Media                                      |          |          |         | Fall Push / Various Digital, Video, Social Media |  |       |     |      |
| Industry, Mfg Construction Pathway  |  |        |           | Fall Push / Audience Builder, Behavioral Targeting, Geofencing Locations (ex. entry-level job locations), Social Media      |          |          |         |  | Fall Push / Various Digital, Video, Social Media |       |     |      |
| Public Safety Pathway               |  |        |           | Fall Push / Audience Builder, Behavioral Targeting, Geofencing Locations (ex. entry-level job locations), Social Media      |          |          |         | Fall Push / Various Digital, Video, Social Media |  |       |     |      |
| STEM Pathway                        |  |        |           | Fall Push / Audience Builder, Behavioral Targeting, Geofencing High School Students w/ Shown Interest in STEM, Social Media |          |          |         | Fall Push / Various Digital, Video, Social Media |  |       |     |      |
| Social, Behavioral, HS Pathway      |  |        |           | Fall Push / Audience Builder, Behavioral Targeting, Geofencing Locations, Social Media                                      |          |          |         |  | Fall Push / Various Digital, Video, Social Media |       |     |      |

# Question One

EXAMPLE ONE: 23-24 ANNUAL PLAN CONT'D

| Audience | July                       | August | September | October  | November | December | January | February | March   | April | May | June   | July |
|----------|----------------------------|--------|-----------|--|----------|----------|---------|----------|---|-------|-----|--|------|
| Veterans |                            |        |           | Addressable Geofencing, Targeted Emails, Programmatic Display, Social Media, Specialized Campaigns as Needed |          |          |         |          |   |       |     | Addressable Geofencing, Targeted Emails, Programmatic Display, Social Media, Specialized Campaigns as Needed |      |
| Hispanic | Fall Push / Geofence Homes |        |           | Addressable Geofencing, Radio, Online Streaming, Programmatic Display, Social Media                          |          |          |         |          | Addressable Geofencing, Radio, Online Streaming, Programmatic Display, Social Media |       |     |  |      |

# Question One

## EXAMPLE TWO:

This is a medium-sized public two-year college located on an urban campus in the Midwest. It has a total undergraduate enrollment of 8,700 and provides 140 two-year degree and certificate programs and non-credit continuing education classes. The College has a main campus and four other campus locations, with student housing on the main campus. The College focuses on Hispanic students as it seeks to become a Hispanic Serving Institution (HSI). The College could not exceed an annual budget of \$100,000 for its annual campaign.

When approaching the College's annual plan, there were two extremely important goals to incorporate into the media plan.

- **Increase the Hispanic population to become Hispanic serving.** To do this, we infused the Hispanic audience with specific ads in all the campaigns we ran. By segmenting the ad creative, we were able to foster a deeper connection with this audience.
- **Fill the dorms.** The high school campaigns were important to run both in and outside the service area to maintain high school market share and recruit for the dorms.

## Strategy Highlights:

**Branding and Awareness:** The College has an "always-on" general branding campaign comprising PPC and Digital Program Keywords. These campaigns are setup to position the College as top-of-mind for online users searching on *anything* college has to offer. We use a mix of brand and general undergraduate keywords across the entire state for the College. This College also borders another state, and with campus housing, we also target a section of out-of-state web traffic. For Digital Program Keywords, we are deploying paid digital search ads for ad groups related to the College's programmatic pathways and relevant jobs, competitor keywords, and general branding. This tactic encourages retargeting to re-engage with a user to foster a deeper connection and promote enrollment.

**The College also received Perkins Funding to promote Career and Technical Education.** As an agency, we have extensive experience running Perkins-funded digital campaigns to ensure that marketing dollars are being attributed effectively and efficiently to support these programs. Our audience building for these campaigns was primarily focused on BIPOC potential students, including special population groups defined by Perkins, such as individuals from economically disadvantaged families, single parents, and out-of-workforce individuals.

To reach these audiences, we ran programmatic digital ads, geofenced locations known to have high foot traffic from these populations, and Search tactics to drive awareness and enrollment. We also ran a branding and awareness campaign on CTV and YouTube for CTE programs.

**Funnel Campaigns:** We took lists of applicants, current students, and Stop-Outs and geofenced those homes to deliver audience-specific ads encouraging students to enroll for the upcoming term. The Stop-Out list was created using past enrollment data of students who had previously enrolled but had not for several terms. These campaigns ran throughout the year to support Fall, Spring, and Summer enrollment.

**Guest Students:** We used addressable geofencing to deliver ads into the homes of freshmen and sophomores with permanent addresses in the College's service area attending four-year institutions in the region. We also targeted a previous guest student list, students who enrolled as a freshmen, marketing to them return as sophomores and take classes.

**Academic Pathways:** We build custom audiences for each of the College's six academic pathways. These audiences used behavioral targeting for keywords relevant to the pathway, geofencing locations applicable to the audience, and website conquering. These campaigns ran during key times based on any pathway-specific registration deadlines.

# Question One

## EXAMPLE TWO: 23-24 ANNUAL PLAN

| Audience                      | July                               | August | September | October  | November   | December | January | February | March   | April | May | June |
|-------------------------------|------------------------------------|--------|-----------|--|--|----------|---------|----------|---|-------|-----|------|
| Individuals in Service Area   | Branding & Awareness / Paid Search |        |           |  |  |          |         |          |   |       |     |      |
| High School (In District)     |                                    |        |           | Geofencing High Schools (Add Juniors 24 from November to December), 2024 Seniors' Homes to Reach Parents and High School Seniors, OTT, CTV |  |          |         |          | Add COVID Seniors, Dual Enrolled Seniors/ Geofencing High Schools, 2024 Seniors' Homes to Reach Parents and High School Seniors, Dual Enrolled Seniors & HS Classes of 22 and 23, TikTok, Spotify, Social Media Video |       |     |      |
| High School (Extended Region) |                                    |        |           | Geofencing High Schools, 2024 Seniors' Homes to Reach Parents and High School Seniors, Video, Social Media                                 |  |          |         |          | Geofencing High Schools and 2024 Senior's Homes to Reach Parents, Video, Social Media   |       |     |      |
| Funnel                        | Fall Push / Geofence Homes         |        |           |  | Winter Intersession & Spring Push / Addressable Geofencing to Current Students, Applicants, and Stopouts |          |         |          | Fall Registration Push / Addressable Geofencing to Prospects/Applicants, StopOuts, Current Not Enrolled List Refresh  |       |     |      |
| University Students           |                                    |        |           |  | Summer Classes Push / Geofencing University Students & the Past Guest Students                           |          |         |          | Summer Classes Push / Geofencing University Students & the Past Guest Students  |       |     |      |
| Hispanic Households           |                                    |        |           |  | Audience Builder, Geofence Locations   |          |         |          |   |       |     |      |

# Question One

## EXAMPLE TWO: 23-24 ANNUAL PLAN CONT'D

| Audience  | November  | December | January | February | March  | April | May | June |
|---|---|----------|---------|----------|--|-------|-----|------|
| Arts, Comm,<br>Humanities Pathway               | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing  |          |         |          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing |       |     |      |
| Business,<br>Entrepreneurship<br>Pathway        | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing  |          |         |          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing |       |     |      |
| Comp-Sci, I.T.,<br>Cybersecurity Pathway        | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing  |          |         |          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing |       |     |      |
| Education, Social and<br>Public Service Pathway | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing  |          |         |          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing |       |     |      |
| Energy, Mfg,<br>Technology Pathway              | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing  |          |         |          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing |       |     |      |
| Health Science Pathway                          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing  |          |         |          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing |       |     |      |
| Science, Math,<br>Engineering Pathway           | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing  |          |         |          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing |       |     |      |
| Online Programs<br>Pathway                      | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing  |          |         |          | Branding & Awareness of Programs in Pathway / Audience Builder, Geofencing |       |     |      |
| Perkins - CTE Pathway                           | Awareness of College to BIPOC Prospects /<br>Audience Builder, Geofencing Locations,<br>Paid Search, CTV, YouTube |          |         |          |  |       |     |      |

# Question One

## EXAMPLE THREE:

This is a public community college located in the Northeast with two campuses and an online campus. The College offers over 100 associate's degree and certification programs, including career training and continuing education programs. Annual enrollment is over 9,800. The College was to not exceed a digital plan budget of \$400,000 and budgeted \$100,000 for billboards.

## Strategy Highlights:

**Branding and Awareness:** There is a strong focus on promoting the overall awareness of the College's "always-on" presence in its service district. To meet this goal, we ran a series of branding and awareness campaigns, including Google Ads, Paid Search, CTV, Audio Streaming, and Web ID. Search tactics specifically targeted anyone searching for anything the college *has to offer*. Creative also highlighted open house registration to increase foot traffic to the campus. With CTV and Audio Streaming, we built target audiences that supported the College's goal to recruit high school students, adult learners with Some College, No Degree, and African-American and Hispanic Markets.

**Guests Students:** We used addressable geofencing to deliver ads into the homes of freshmen and sophomores with permanent addresses in the College's service area attending four-year institutions across the state. We also targeted a previous guest student list, students who enrolled as freshmen, marketing to them return as sophomores and take classes.

**Academic Pathways:** We build custom audiences for the College's 11 academic pathways. These audiences used behavioral targeting for keywords relevant to the pathway, geofencing locations applicable to the audience, and website conquering. These campaigns ran during key times based on any pathway-specific registration deadlines.

**Funnel Campaigns:** To drive enrollment of new and current students, we deployed addressable geofencing to homes of prospects, applicants, students who have not attended for the past two to three years, and current students to encourage them to enroll for the upcoming term.

**Traditional Media Plan:** Since branding and awareness are top priorities for the College, this annual media plan also included several targeted billboards within the service district,

# Question One

## EXAMPLE THREE: 23-24 ANNUAL PLAN

| Audience   | September   | October  | November  | December | January | February   | March  | April | May                                  | June |  |  |
|--|---|--|---|----------|---------|--|--|-------|--------------------------------------|------|--|--|
| Individuals in Service Area                                | Branding & Awareness / Paid Search, Spotify, CTV, WebID |  |   |          |         |  |  |       |                                      |      |  |  |
| Stopouts   |   | Spring Push / Geofence Homes   |   |          |         |  |  |       | Summer Classes Push / Geofence Homes |      |  |  |
| High School Seniors, Dual Enrolled Seniors, & Parents      |   | Multiple Messages (Awareness, Scholarships, Enroll) / Addressable Geofencing, Video, Facebook, Snapchat, Social Digital, Native, Geofencing High Schools |   |          |         | Multiple Messages (Awareness, Scholarships, Enroll) / Addressable Geofencing, Video, Facebook, Snapchat, Social Digital, Native, Geofencing High Schools |  |       |                                      |      |  |  |
| COVID Seniors (Seniors from 21, 22, and 23)                |   |  | Addressable Geofencing                                  |          |         |  | Addressable Geofencing   |       |                                      |      |  |  |
| Funnel (Current Students, Prospects, Applicants, Stopouts) | Fall Push / Addressable Geofencing                      |  | Fall Push / Addressable Geofencing With Refreshed Lists |          |         |  | Summer & Fall Push / Addressable Geofencing                                    |       |                                      |      |  |  |
| University Students  |   |  |   |          |         |  | Summer Classes Push / Geofencing University Students & the Past Guest Students |       |                                      |      |  |  |

# Question One

EXAMPLE THREE: 23-24 ANNUAL PLAN CONT'D

| Audience                         | October   | November | December | January | February  | March   | April | May   | June |
|----------------------------------|---|----------|----------|---------|---|---|-------|---|------|
| Business Pathway                 | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         |   |   |       | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |      |
| Creative Arts Pathway            | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |   |       |   |      |
| Culinary & Hospitality Pathway   | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         |   | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |       |   |      |
| Education Pathway                | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |   |       |   |      |
| Engineering & Technology Pathway | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         |   | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |       |   |      |

# Question One

EXAMPLE THREE: 23-24 ANNUAL PLAN CONT'D

| Audience                         | October   | November | December | January | February  | March   | April | May   | June |
|----------------------------------|---|----------|----------|---------|---|---|-------|---|------|
| Health Pathway                   | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         |   | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |       |   |      |
| Liberal Studies Pathway          | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |   |       |   |      |
| Public & Social Services Pathway | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         |   |   |       | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |      |
| Science & Math Pathway           | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         |   | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |       |   |      |
| Online Pathway                   | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |          |          |         |   |   |       | Promoting Programs in Pathway / Audience Builder, Geofencing, Website Conquesting, Social Media as Applicable |      |

# Question Two

**Provide information concerning data tracking/reporting, and impressions delivered that maximized the return on investment for three or more higher education clients that demonstrated success in strengthening brand awareness and provided evidence in regard to increases in student enrollment and student retention.**

Data is at the center of every CLARUS marketing strategy. Starting from project kickoff and throughout our partnership, our team of strategists will work with you to translate campaign objectives into the right KPI metrics and goals. These will become the focal point for campaign performance measurement, reporting, and analysis. The KPIs are constantly monitored to prove strategy and tactic effectiveness and make campaign optimizations. Carnegie will work with you to deploy the right tracking technologies to collect data tied to the defined KPIs. This ranges from the placement of ad platform tracking pixels to helping configure web analytics tracking. The data collected is then used in our live reporting dashboards built on leading data visualization platforms. These dashboards are available 24/7 and updated daily, making campaign results and ROI fully accessible at any time. In addition to the live dashboards, our strategists will provide analysis, insights, and next steps based on campaign performance.

Once a campaign flight has ended, we request the list of applicants or enrolled from the College and match it against the addresses to which we served digital ads. Once we have analyzed the data, we will provide a comprehensive summary that visually displays your campaign's performance and walk you through this data. This report includes the details of the campaign, lists of outcomes for any households geofenced for upload into the College's CRM, and an assessment of tactical changes that may improve the results for the target audience in future campaigns.

**Our job is to support the Marketing Team in telling the marketing story internally to the College community.**

The subsequent slides provide three examples of how we combined campaign reporting and insights with enrollment data to deliver a comprehensive view of how the media spend supported enrollment.

# Fall StopOut Campaign

## THE COLLEGE

The College is situated in a large metropolitan area located in the South Central US. Enrollment consists of over 30,000 students college-wide, with over 60% of the student body being of Hispanic or Latino origin.

## THE STRATEGY

The College collaborated with CLARUS to deploy an addressable geofencing campaign to a list of prior enrollees (32,854) who stopped registering for classes. This campaign ran for six week with a media spend of \$18,000. We ran "We miss you" and "Come back" creative ads promoting when Fall classes would start.

## THE RESULTS

With addressable geofencing, we were able to provide the College with a direct ROI on this campaign by matching their Fall enrollment against the list of addresses we delivered ads to.

|               |             |                 |                             |              |
|---------------|-------------|-----------------|-----------------------------|--------------|
| <b>32,854</b> | <b>2.2M</b> | <b>510</b>      | <b>\$3,834</b>              | <b>3,834</b> |
| List Size     | Impressions | Total Actions** | Cost Per Action<br>(CPA***) | Enrollments  |

\*\* Actions are defined as direct visits to a campus location and/or website visit.

\*\*\*Cost per action: Dollars spent divided by numbers of actions.

# Funnel Campaign: New & Current Student Spring Enrollment

## THE COLLEGE

The College has a very defined service area of roughly 420 square miles of a county located in a Southern state. Agriculture, healthcare, and oil and gas production drive the county's economy. Annual enrollment for the College is just under 5,000 students.

## THE STRATEGY

The College collaborated with CLARUS because it needed support to boost new and returning student enrollment. To drive awareness and enrollment, we ran an addressable geofencing campaign of a list of COVID Seniors (High School Class of 2021 and 2022, not enrolled in college) and current students not enrolled for the Spring. Leveraging our database of over 330 million households, we also built a custom audience of prospective adult students, with some college and not currently enrolled in college. This campaign ran from November to January with a \$17,500 media spend.

## THE RESULTS

With addressable geofencing, we were able to provide the College with a direct ROI on this campaign by matching their Spring enrollment against the list of addresses we delivered ads to.

|               |             |                 |                             |              |
|---------------|-------------|-----------------|-----------------------------|--------------|
| <b>15,355</b> | <b>2M</b>   | <b>6,837</b>    | <b>\$2.56</b>               | <b>3,405</b> |
| List Size     | Impressions | Total Actions** | Cost Per Action<br>(CPA***) | Enrollments  |

\*\* Actions are defined as direct visits to a campus location and/or website visit.

\*\*\*Cost per action: Dollars spent divided by numbers of actions

# Funnel Campaign: New & Current Student Spring Enrollment

## THE COLLEGE

The College is located in the Northeast with two campuses and an online campus. Annual enrollment is over 9,800.

## THE STRATEGY

The College collaborated with CLARUS because it needed support to boost new and returning student enrollment. To drive awareness and enrollment, we ran an addressable geofencing campaign to encourage past students, current students, and applicants who have not enrolled to enroll for the Spring term. This campaign ran from October to January with a \$8,100 media spend.

## THE RESULTS

With addressable geofencing, we were able to provide the College with a direct ROI on this campaign by matching their Spring enrollment against the list of addresses we delivered ads to.

**20,704**

List Size

**1M**

Impressions

**6,315**

Total Actions\*\*

**\$25.69**

Cost Per Action  
(CPA\*\*\*)

**6,921**

Enrollments

\*\* Actions are defined as direct visits to a campus location and/or website visit.

\*\*\*Cost per action: Dollars spent divided by numbers of actions

# Question Three

**Experience in producing media plans and executing media buys for higher education clients with a defined project budget.**

**Experience:** Serving more than 175 community colleges around the country and managing more than 25,000 digital campaigns, CLARUS is the leader in digital marketing for community colleges and creating media plans to achieve your enrollment goals. CLARUS joined the Carnegie family in 2023, making us uniquely positioned to expertly craft a media plan to deliver the best results for Massasoit. Leaning into our past work with Massasoit, we will combine our previous knowledge and understanding of your brand and key audiences with our expansive community college digital expertise to develop the most effective digital marketing approach possible.

**Media Plan Development:** Our first step in marketing and media strategy is ensuring we understand your goals, objectives, audiences, and markets at a very granular level. Once discovery has taken place, we will build a media strategy to achieve those goals, executing an integrated digital tactical approach that may include a channel mix of: Display, Paid Search, Social Media Marketing, Geofencing, Streaming, and Search Engine Optimization services. All media planning and placement is done in-house by our internal teams of digital specialists and strategists. In addition to your digital strategy team, you will have a dedicated Account Manager who will serve as your single point of contact to funnel all day-to-day communications. With experience serving hundreds of community colleges we have the unique ability to strategize and implement media across channels with an understanding of the nuances of reaching a wide range of prospective students. We design data-driven strategies that increase engagement, develop affinity, and drive conversions.

# Question Four

**Experience in producing annual media plans for diverse audiences while maintaining institutional branding and visual identity standards.**

**Reaching Diverse Audiences:** Intelligent digital marketing that moves the needle for your awareness and enrollment goals requires constant adaptation based on market changes and the audiences you need to reach. For over a decade we have planned, and successfully executed, thousands of campaigns to reach a wide range of prospective student audiences and have a deep understanding of the distinctions to engage prospects of all kinds.

We understand that the journey for a traditional undergraduate student is vastly different than that of an adult learner changing careers. As such, we will determine which platforms and tactics work best for each and how to align calls-to-action and messaging with each audience, all while maintaining your visual identity and authentic branding no matter the channel. As experts in understanding the unique student journey, we know not only the right budget to allocate, but which devices to deliver on, what keywords to leverage, and what messages will resonate. Additionally, since we work exclusively with community colleges, means we have access to campaign data for hundreds of colleges across the country, allowing us to create our own benchmarks to compare performance against.

# Question Five

**Experience producing and executing integrated marketing strategies and tactics, including those on client's websites and utilizing email marketing platforms.**

**Executing Integrated Marketing Plans:** As a full-service agency for community colleges, our team is equipped to provide services beyond digital advertising to include SEO, website personalization, and email comm flow strategy. Our in-house SEO team provides a full spectrum of services, including but not limited to: technical site audits, content optimization, long and short-form copywriting, and more.

Our team of marketing experts can also provide email and communication strategy support to ensure we align digital lead generation efforts, landing page development, SEO strategy, with email communication outreach. Additionally, for clients utilizing Carnegie Clarity™—our proprietary website personalization and attribution tool—we can provide additional personalization and leads via your website. Finally, we will work with you to ensure we're generating and connecting your leads into your CRM in a timely manner.

# Question Six

**Experience in producing quick-response media plans aimed at targeting currently enrolled students with the purpose of increasing student retention.**

**Student Retention Marketing:** Leveraging a list of the College's enrolled students, we can help you increase retention by engaging current students through a mix of digital list based strategies like addressable geofencing and list-based social media targeting via Meta, Snapchat, and TikTok. In addition, a regular cadence of email marketing, text messaging, and messaging via current student portals could be utilized. Since our sole focus is higher education marketing, our expert team of copywriters and designers are also well-positioned to help produce both visuals and ad copy that will best resonate with your currently enrolled student population to elicit student engagement and support the College's retention efforts.

# Question Seven

**Provide five (5) current or former business references. At least three (3) shall be higher education business references**

**Sanath Kumar**

**Central Ohio Technical College**

*Director of Marketing and Public Relations*

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p. 740.755.7806

e. [kumar.860@osu.edu](mailto:kumar.860@osu.edu)

Current digital client

**Kris Green**

**Kansas City Kansas Community College**

*Chief Marketing & Image Officer*

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Current digital client

**Erin Hergert**

**Pueblo Community College**

*Director of Marketing*

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Current digital client

**Jena Vogtman**

**Northwood Technical College**

*Associate VP of Marketing and Communications*

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e. [jena.vogtman@northwoodtech.edu](mailto:jena.vogtman@northwoodtech.edu)

Current digital client

**Erin Jellesma**

**Montgomery County Community College**

*Director of Marketing*

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Current digital client

This information is also provided in Attachment G

# Question Eight

**Provide company profile, length of time in business, core competencies and bios of key personnel who will be assigned to the College. Bidder should have ten (10) or more years' experience in digital media buying services that highlights previous relevant experience in higher education and demonstrates success with integrated digital campaign building and expertise in digital mediums.**

Over the past 30 years, CLARUS- a Carnegie Company has worked with more than 350 community colleges. Over the past 9 years we have supported digital media planning, strategy, and execution.

Serving these clients has given us valuable experience in reaching diverse audiences, including high school students, non-traditional students, adult learners, transfer students, career changers, and more. We will leverage different platforms and tactics to reach the right audience profile depending on the intended goal. For example, with social media advertising, we can be specific enough to target based on interest, age, gender, demographics, job titles, field of study, and more.

We take a holistic and creative approach to campaign management, accommodating to fit your needs and providing the flexibility and customized approach necessary for the best possible outcomes. With cross-channel expertise and in-house experts, our approach eliminates guesswork and drives results. We're not limited to a particular product, channel, or capability—we let your goals and audiences determine our approach. Since all our campaigns are run in-house, we can be fluid with budget across tactics and between marketing mediums to ensure we're optimizing budget to the best-performing strategies throughout your campaign.

*This information is also provided in Attachment F*

*Continued on the next page*

# Question Eight

## **Dr. Kathi Swanson**, President

Dr. Kathi Swanson brings nearly three decades of experience collaborating with community colleges and offers a deep understanding of their operational dynamics. Having engaged with over a third of the nation's community colleges, her expertise extends to marketing strategies that ensure these institutions remain up-to-date with their advertising approaches and gain valuable insights into their target audiences.

## **Kristy Phillips**, Senior Director, Client Success

Kristy is a valuable client resource for full-funnel strategies across audiences. Before joining Carnegie, she spent 12 years at several institutions, serving in enrollment and marketing leadership positions. Her experience includes spearheading two university website redesign initiatives. Over the past four years at Carnegie, Kristy's role has grown to exclusively focus on the community and technical college market. She has an unrivaled eye for building consensus and expertise in developing positioning statements for campuses that are part of a larger system, workforce development programs, and academic pathways. Her forward-thinking approach enhances recruitment strategies across adult learners, first-year students, transfers, and graduate and professional studies. Kristy earned her doctorate in Educational Leadership from Washington State University. She focused her doctoral research on the business of prior learning to recruit adult learners, specifically the Some College, No Degree population.

## **Alison McLallen**, Director, Account Management

Alison is a versatile professional who has cultivated a strong educational foundation through her studies at Arizona Western College, a community college in Yuma, AZ, and Northern Arizona University. Her diverse skill set and extensive knowledge uniquely position her to champion the missions and objectives of community colleges while working tirelessly to showcase their impact and enhance their visibility.

## **Ashley Macawile**, Paid Social Media Specialist

Ashley, equipped with an associate's degree in Arts and an AGEC-A Certificate from Arizona Western College, a community college in Yuma, AZ, is committed to leveraging her digital engagement expertise to make substantial contributions to the objectives of our clients. Driven by a love for knowledge, she pursues fresh insights and avenues to support the transformative endeavors of community colleges. Ashley has spent her years at CLARUS developing and executing social media strategies across Facebook, Instagram, Snapchat, and TikTok that meet each client partner's individual goals and needs - from building brand awareness, to event promotion and registration, to enrollment marketing campaigns.

## **Ashlee Sikora**, Director, Paid Search

Ashlee is an experienced digital marketing professional specializing in PPC, with additional proficiency in Performance Max and Demand Generation. With more than nine years of dedicated service in higher education, her primary focus is assisting colleges and universities in achieving their enrollment objectives through the management of highly effective PPC campaigns. She has developed and executed hundreds of paid search campaigns for our clients, with keyword strategies focused on branding, degree completion, pathway programs, workforce development, and more.

## **Chelsie Shackelford**, Director, Digital Operations

Chelsie is a goal-oriented digital engagement professional with an impressive array of industry certifications, notably in Google Ads Search and Display. With a background at North Idaho College, a community college in Coeur d'Alene, ID, she has actively contributed to crafting and implementing effective marketing campaigns, elevating student recruitment initiatives, and refining strategies for digital engagement.

*This information is also provided in Attachment F*

# Question Nine

**Provide approach to tracking the success of college campaigns. Does the bidder provide comprehensive reports with campaign statistics and does the bidder recommend shifts in strategy mid-campaign based on outcomes?**

**Reporting, Optimizations, and Outcomes:** Once campaigns are launched our team of strategists, specialists, and campaign managers will be working together to ensure optimal campaign performance. Dedicated team members will be making sure each campaign is pacing and performing on track as well as ensuring all campaigns and channels are working together to meet the overall goals. Our team takes a very hands-on approach in reviewing performance and making daily optimizations to ensure best results. In addition to our constant monitoring and ongoing analysis, you will be provided with a live performance dashboard, giving you real-time access 24:7 to view all campaign data. With this visibility you will always have transparency into your campaign performance metrics, showcasing KPIs like: clicks, impressions, cost per click, cost per lead, top performing keywords, lowest performing keywords, conversion trends, and ad copy performance details. In addition to the live dashboard, we will meet with your team on a monthly basis to review performance and discuss any recommendations our team has - including shifting budget allocation across channels based on performance, pausing underperforming channels, tactics, or ad sets, testing new strategies, etc. as well as discussing assets needed for any upcoming flights to ensure smooth and timely campaign launches throughout the year.

**Measuring ROI:** In addition to typical KPIs, in every campaign we run, we assess ROI by tracking total applications generated and enrollment numbers resulting from our initiatives. This data is also accessible via a live reporting dashboard for total transparency and accountability regarding the funds invested in enrollment efforts.

# Live Reporting at Your Fingertips

Our live dashboard reports provide a highly visual presentation of the metrics that matter in your campaigns.

## AWARENESS METRICS

Total impressions, average impressions per day, and cost per impression give you a sense of reach.

## INQUIRY METRICS

Total actions and cost-per-action (CPA) numbers show you how many people decided to engage.

## KEY PERFORMANCE INDICATORS

Presented by device, these metrics show how effective your campaigns are based on different technology tools that your audiences are using.



## CUSTOMIZABLE DATE RANGES

You can view the performance of your campaigns for any periods of time that campaigns are running.

## CLICK METRICS

We provide full visibility into the number of clicks, click-through rates (CTR) and cost per clicks (CPC).

## BOTTOM-LINE RETURN ON INVESTMENT

Our reports show you your ultimate **ROI** for each campaign.



# Agency Fees and Budgeting

# Cross-Channel Annual Digital Strategy

**GOAL:** Develop and execute a digital integrated marketing and advertising program that elevates and promotes the College to support enrollment and community engagement.

**AUDIENCES:** Prospective students between 18-65+

**STRATEGY:** We've outlined integrated digital recommendations inclusive of **display, paid search, search engine optimization (SEO),** and **conversion-focused paid social media strategies.** Our campaigns include:

1. Fall, Fall Accelerated Session, Winter Session, Spring, Spring Accelerated Session, and Summer recruitment campaigns.
2. Fall, Fall Accelerated Session, Winter Session, Spring, Spring Accelerated Session, and Summer retention campaigns.
3. Campaigns to support Non-Credit and Workforce Development efforts.
4. Short-term, low-cost campaigns to promote specific College programs and/or events.
5. Evergreen academic-pathway based campaigns to promote career-and-goal-oriented recruitment and retention.

## STRATEGY HIGHLIGHTS:

- + Utilizing Social Media, Audience-Builder and Geofencing to generate both awareness and inquiries amongst prospective students .
- + Leveraging PPC to generate inquiries from mid-funnel users who are actively searching your brand and program keywords.
- + 24/7 Access to live looker studio dashboard to track campaign performance metrics and ongoing optimizations.
- + Deploy SEO best practices to optimize frontend and backend content to drive high-intent organic traffic to the College webpages and optimize content for on-site UX, including journey mapping to focus on how users consume content on your site.

# Cross-Channel Annual Digital Strategy



**CLARUS | Massasoit Community College**

2024-25 Annual Plan

| Audience   | July  | August | September  | October  | November | December  | January | February   | March  | April   | May  | June |
|--|---|--------|--|--|----------|---|---------|--|--|---|--|------|
| Recruitment: 18-45, high school/ some college  | Recruitment - Fall 2024 - Paid Search, Geofence, Display, Video<br>\$18,000                     |        |  |  |          | Recruitment- Spring 2025 - Paid Search, Geofence, Display, Video, Social Media<br>\$18,000        |         |  |  | Recruitment- Summer & Fall 2025 - Paid Search, Geofence, Display, Video, Social Media<br>\$32,000 |  |      |
| Retention & Enrollment Funnel (Prospects, Applicants, StopOuts, Current Not Enrolled; lists provided by College) | Retention & Enrollment Funnel - Fall 2024 - List-based Display, Video, Social Media<br>\$15,000 |        |  | Retention & Enrollment Funnel - Winter 2024 - List-based Display, Video, Social Media<br>\$5,000 |          | Retention & Enrollment Funnel - Spring 2025 - List-based Display, Video, Social Media<br>\$15,000 |         |  | Retention & Enrollment Funnel - Summer & Fall 2025 - List-based Display, Video, Social Media<br>\$23,000 |   |  |      |
| Non-Credit & Workforce Development: High School, 25-54   | Non-Credit & Workforce - Fall 2024 - Geofence, Display, Video, Social Media<br>\$14,000         |        |  |  |          |   |         |  |  | Non-Credit & Workforce Fall 2025 - Geofence, Display, Video, Social Media<br>\$14,000             |  |      |
| Programs and/or Events: Open Houses, Graduations, etc  |   |        | Programs & Events Fall 2024 - Geofence, Display, Video, Social Media<br>\$4,916.67 |  |          |   |         | Programs & Events Spring 2025 - Geofence, Display, Video, Social Media<br>\$4,916.67 |  |   | Programs & Events Summer 2025 - Geofence, Display, Video, Social Media<br>\$4,916.67 |      |
| Search Engine Optimization (SEO)   | 2 pages/month<br>\$8,000  |        |  |  |          |   |         |  |  |   |  |      |

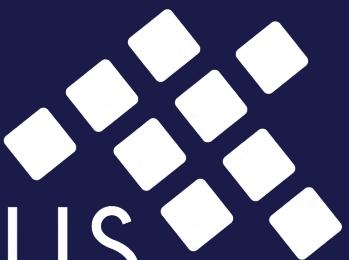
| Campaign CTA Key                       | Budget Total |
|--|--------------|
| Recruitment                            | \$68,000.00  |
| Retention & Enrollment Funnel          | \$58,000.00  |
| Non-Credit & Workforce Development     | \$28,000.00  |
| Programs and/or Events                 | \$14,750.00  |
| Search Engine Optimization             | \$8,000.00   |
| Campaign Setup, Management & Reporting | \$47,250.00  |
| Total                                  | \$225,000.00 |

## Massasoit Proposed Annual Digital Plan

Note: These recommendations are fully scalable and adjustable to fit any budget or goals.

Optional extensions: CLARUS account managers review performance data and discuss goals for next year's annual digital plan with the client at the end of each fiscal cycle. Changes in the client's strategic goals and budget are taken into consideration to develop a custom plan each year, as well as emerging platforms and technologies that support the client's goals. CLARUS designs each year's plan around successes and learnings from the performance of the previous year's plan. Account managers develop plans based on a flat budget year-over-year and adjust accordingly based on the client's needs and budget availability.

# Attachments



# CLARUS

A **CARNEGIE** COMPANY

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Westford, MA 01886

978.692.5092

[info@carnegiehighered.com](mailto:info@carnegiehighered.com)

[claruscorporation.com](http://claruscorporation.com)

JUNE 2024

# Shasta College

PROPOSAL

## Digital Advertising RFP



CLARUS  
A CARNEGIE COMPANY

## CLARUS is excited to offer a proposal in response to Shasta College's request for digital marketing services!

Peter Griggs

Director of Marketing, Communications, and Public Relations

Thank you for the opportunity to submit a proposal for digital marketing and email and SMS services!

The project at hand has far-reaching potential for Shasta College to be top-of-mind across the various student audiences it serves. It's an opportunity to approach marketing with hyper-customized audience targeting to deliver segmented creative to drive enrollment. Our proposal includes cross-channel digital strategies that factor in the geographic reach the College has across the three-county service area and the audiences listed in the RFP.

Being aware of current technology limitations to deploy automated email campaigns, we are also proposing a slate scope of work that would allow us to do the heavy lifting and provide Shasta College with the capability to text and email prospects.

We hope to be a comprehensive strategic partner who delivers an extensive range of advertising and marketing services, inclusive but not limited to audience-specific strategic multi-channel marketing aligned with the College's goals.

Working with us, you'll:

### **Have a partner who knows community colleges.**

Since 1988, our primary focus has been assisting community colleges in knowing their communities, serving their constituents, and understanding their audiences. We have achieved excellence by helping organizations boost their enrollments, even in the midst of a pandemic. Because our team members have worked in community colleges ourselves, we know your challenges and your markets – and we know how to reach your audiences.

### **Receive expertise and capacity where you need it most.**

Recognizing that each institution possesses distinct capacities and talents, our solutions are tailored to each community college with whom we partner. Our team comprises experts in creative, marketing, web design, SEO, digital technologies, CRM, communications, research, and consulting. We can seamlessly integrate with your team, filling in any gaps and enhancing your existing talents. Our extensive pool of skilled professionals also enables us to quickly adapt to emerging challenges.

**Embrace a philosophy and approach that are markedly different and fundamentally better than the prevailing standard.** We've always led with innovation, constantly seeking what's next for community colleges. We were the first to introduce addressable geofencing to our clients and have developed groundbreaking methods for measuring ROI on digital campaigns. Currently, we're working with clients to integrate AI into daily tasks to enhance productivity. In a world where tools and systems are increasingly vital, we've remained on the cutting edge of technology integration. Please know our team will bring this level of enthusiasm and expertise to our partnership with you.

As you review our proposal, please contact me at the number below if you have any questions or would like additional information. Hopefully, this proposal will serve as a springboard for further conversation and collaboration – we'd love to tailor our approach to your needs.

Sincerely,

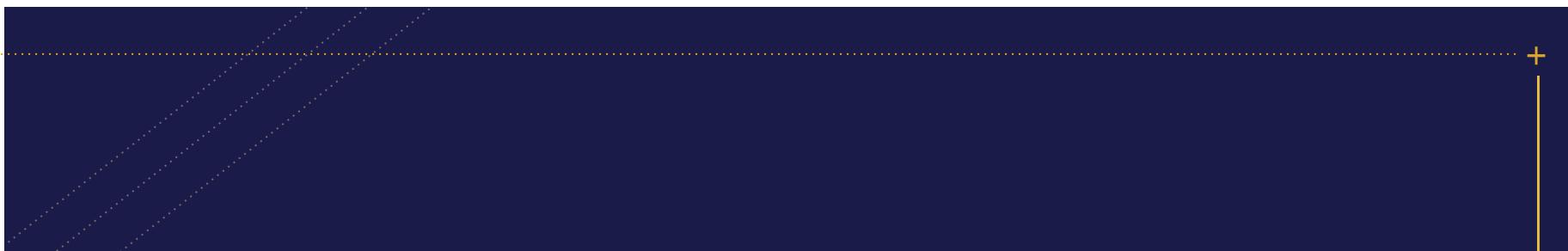


Kristy Phillips, Ed.D.  
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# Contents

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| Our Price Proposal           | 17 |
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# Firm History + Experience

CLARUS  
A CARNEGIE COMPANY

# CLARUS at a Glance

For 35 years, CLARUS has been a leader and innovator in community college marketing and enrollment strategy. We offer groundbreaking services in the areas of research, enrollment strategy, and software solutions. In 2015, CLARUS opened its Digital Marketing Division to assist community colleges in an audience-based approach to increasing enrollments.

## Unique Institutions, Unique Solutions

CLARUS was the first firm to focus exclusively on the community college market. We have a deep understanding of the challenges that community colleges face in today's complex market landscape, and we recognize that although these challenges may be universal, the solutions for each institution must be tailored to the characteristics of their individual service areas.

## Providing ROI

In every campaign we run, we assess ROI not through typical metrics but also by tracking total applications generated and enrollment numbers resulting from our initiatives. This data is accessible via a live reporting dashboard for total transparency and accountability regarding the funds invested in enrollment efforts.

## Data-Driven Recommendations

We embody a personalized, focused, and tailored approach to address the distinct enrollment needs and challenges of each client. Our experienced team of former community college marketers thoroughly assesses your strategic, enrollment management, and marketing plans, along with other pertinent data, to ensure our recommendations and strategies are in sync with your priorities.

**1988**

The year our company  
was founded

**150+**

The combined years of  
work experience in  
community colleges  
across our staff

**45**

The number of states  
represented by our partner  
institutions

**12**

The number of higher  
education organizations  
we partner with annually,  
including NCMPR,  
CCPRO, NSCEC, NACTC,  
ACCT, TACCM, and  
EdAmerica

**250,000+**

The number of student  
interviews conducted for  
custom research

**571**

The number of  
community colleges we  
have served

**2.25B**

The number of digital  
ads delivered for our  
clients

**4.42M**

The number of student  
visits generated to our  
community colleges

**15**

The number of major  
conferences we present  
at annually

# A CLARUS Difference

Founded in 1988, CLARUS has pioneered the focus on community college marketing. With a portfolio of over 25,000 digital campaigns, CLARUS stands as the premier digital marketing expert for community colleges today, helping our clients leverage digital marketing strategies to achieve their application, enrollment, and retention goals. Here's what sets us apart!

## DATA-DRIVEN APPROACH

We leverage enrollment insights, audience data, campaign metrics, and website analytics to inform all our digital marketing strategies for our clients. We use this data to identify trends, target audiences, and measure the success of campaigns.

## CUSTOMIZED SOLUTIONS

Although every community college may have similar challenges, the campaigns and messaging for those colleges should be very different, tailored to their specific landscapes. We focus on understanding your unique market audience and creating digital marketing solutions – including personalized messaging, targeted advertising, and unique campaign strategies – to meet your specific needs and goals.

## INDUSTRY EXPERTISE

Over the last 30 years, we've worked with more than half of the community colleges in the country to identify marketing and enrollment opportunities.

## AUDIENCE-CENTRIC PLANNING

Unlike traditional ad agencies that purchase platform space and then search for an audience, we develop plans by first identifying target audiences and then selecting the platforms that best reach those groups.

## FOCUS ON BOTTOM-LINE ROI

We go beyond the basic metrics of impressions, clicks, and cost-per-click. Our goal is to increase meaningful actions, including visits to campus and interactions on websites. By taking these measurements into account, we can focus on cost-effective strategies that yield measurable results.

## INNOVATIVE TECHNOLOGIES

We utilize cutting-edge technologies and tools to enhance our digital marketing efforts. We integrate AI and machine learning to better target segments, create ads, automate elements of campaign management, and analyze performance data ... all to deliver the best ROI for you.

# Everything You Need

We provide a complete range of services to meet your needs. With CLARUS, you'll have one team that's fully equipped to serve as your partner, trusted advisor, and "make the magic happen" resource.

## RESEARCH + CONSULTING

- ◆ Two-Year Community Perception Scan
- ◆ Market Scan
- ◆ Student Journey & Communications Audit
- ◆ Predictive Modeling of Enrollment Propensity

## BRAND + CREATIVE

- ◆ Brand Personality Foundation
- ◆ Photography and Videography Production Package
- ◆ Viewbook Production
- ◆ Static and Animated Display Banner Creative Production
- ◆ Landing Page Production and Hosting
- ◆ Content Writing

## DIGITAL MARKETING

- ◆ Search Engine Marketing (PPC)
- ◆ Geofencing and Addressable Geofencing (to 25 square feet)
- ◆ Event Capture
- ◆ Programmatic Display
- ◆ Remarketing
- ◆ Social Media (Meta, Snapchat, LinkedIn, TikTok)
- ◆ Streaming Video (YouTube, ConnectedTV, Twitch)
- ◆ Streaming Audio (Spotify, iHeartRadio, Pandora)
- ◆ Podcasts
- ◆ Lead Generation
- ◆ Content Marketing
- ◆ Google Analytics
- ◆ Search Engine Optimization (SEO)
- ◆ Google Business Profile Optimization
- ◆ Website Design and Development
- ◆ WebID

**CLARUS joined Carnegie in March 2023 to better serve community colleges and their students while broadening the company's support of higher education as a whole.**

Founded in 1988, CLARUS, A Carnegie Company, has pioneered the focus on community college marketing. With a portfolio of over 25,000 digital campaigns, CLARUS stands as the premier digital marketing expert for community colleges today, helping our clients leverage digital marketing strategies to achieve their application, enrollment, and retention goals.

As the community college experts at Carnegie, we bring an unmatched understanding of the strategic goals and challenges of community colleges and serve as strategic advisors for all things related to approach and design.



# Access to a Deep Bench of Carnegie Experts

We can meet you wherever you are in your journey. Consider our team an extension of your own – focused on your needs, dedicated to your success.



## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.



## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.



## ENROLLMENT STRATEGY

Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.



## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.



## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.



## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.



## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.



## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.



## SIGNATURE CREATIVE

By defining what sets you apart and by learning what will speak to your audiences, we create impactful messaging that builds reputation and forges powerful connections.



## SLATE OPTIMIZATION

Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.



## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.



## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.

# Expertise & Partnerships

CLARUS has established deep partnerships with industry leaders including Google, Meta, Simpli.fi, Snapchat, and TikTok. Dedicated partners across these major media platforms support our team by sharing the latest trends in technology and digital marketing, troubleshooting and making recommendations for our campaigns, presenting opportunities to beta-test new products and features, delivering insight into local and national trends, and providing exclusive access to platform-specific trainings/webinars.

We participate in many industry associations (like CES and the Digital Summits) to stay abreast of new trends in the digital industry, as well as the community college associations (ACCT, AACC, NCMPR, TACCM, and CCPRO) to continue to understand community college trends and student behavior. We utilize the insight we gain from these connections to make better decisions for our clients.



Association of Community  
College Trustees



American Association of  
Community Colleges



National Council for Marketing  
& Public Relations



Texas Association of  
Community College Marketers



California Community Colleges  
Public Relations Organization

PREMIER

Google  
Partner

Each year, Google recognizes the achievements of top-performing digital marketing partners across the globe by awarding Premier Partner status. **Only 3% of Google Partners achieve this honor.**

Our Google partnership benefits you in the form of expertly trained staff, dedicated Google account and technical support, and early access to exciting beta products. Additional benefits include competitive spending analysis reports, quarterly education trends reports, and more.

# Our Slate Team At A Glance

## Slate Platinum Preferred Partner

The first organization invited to be part of Technolutions' Platinum Partner program.

## A National Team of Experts

A distributed team of 40+ Slate squad members, each with a background in Higher Education

## Reach and Impact

More than 200+ Slate clients across the U.S. and around the world.



## Service Integration

Seamless integration with digital marketing, website development, financial aid optimization, lead generation, brand, and more.

## Part of a Complete Ecosystem

An interdisciplinary approach of marketing across our products and services.



# Discovery + Research Steps

# Project Approach

We begin every project by meeting with your stakeholders, gathering any relevant research conducted, and analyzing strategic plans that are already in place. A thorough understanding of your big-picture needs and how they align with the current enrollment goals is necessary to create the most effective marketing plan. A dedicated team is assembled to handle not only the kick-off and implementation, but also the ongoing optimizations to ensure the best results possible.

## Your Team

We have assembled a talented team of project managers, digital strategists, and vertical marketing experts who will remain constant throughout your campaign. Additionally, you will be assigned a dedicated Account Manager; all day-to-day communications funnel through this contact to provide you with a clear and consistent communication channel to your CLARUS team.

## Working Together

Prior to launching any campaign flight, we discuss goals, needs, and strategy for the upcoming campaign, as well as messaging and creative. After that discussion, the actual proposal outlining all the specifics of the campaign (purpose, target audience, time frame, messaging, platforms, impressions, creative/assets, and budget) is sent to you for your review and approval. Once all assets are in hand, the campaign is built and ready to launch within a few business days. We hold bi-monthly check-ins to evaluate performance, provide insights and context on KPIs, and modify as needed any campaigns that are running or planned.

## Measuring Results & Campaign Dashboards

Starting from project kickoff and throughout our partnership, our team will work with you to translate campaign objectives into the right metrics and goals. These will become the focal point for campaign performance measurement, reporting, and analysis. KPIs are constantly monitored to prove strategy and tactic effectiveness and make campaign optimizations. We assist the College in developing UTM tags, placing conversion pixels, and all other methods to assist in measuring the success of the campaigns. The data collected is then used in our live reporting dashboards built on leading data visualization platforms. These live dashboards are available 24/7 making campaign results and ROI fully accessible at any time. In addition to the dashboards, our strategists will provide analysis, insights, and next steps based on campaign performance.

# Four Phases

Our approach to your project will be clear and methodical, with each step building on our previous efforts.

One of our major goals in partnering with you is to take the guesswork out of enrollment and create a seamless partnership.



## STEP ONE: IDENTIFY AUDIENCES

**Develop student personas** to represent your target audiences.

**Create audiences** based on your historical enrollment data we will match your data to 330 million households in the US defined by offline and online behaviors to find prospective students in your service area with these personas. Through targeted lists, we will reach individuals who match your audience criteria at a household level.

## STEP TWO: DEVELOP STRATEGIES

**Recommend platforms and tactics that align with your target audience**, tailored to the personas identified for your institution, considering demographic, behavioral, and lifestyle characteristics.

**Deliver detailed segment characteristics** (demographic, behavioral, and psychographic) that allow us to fine-tune our targeting and select the platforms and tactics best suited to reach your audience.

**Provide a digital plan** to include audience size, messaging, programs to be promoted, campaign duration, budget needs, creative assets, and key platforms for effectively reaching audiences and achieving the necessary impressions.

## STEP THREE: DEPLOY PLANS

**Provide a detailed checklist** outlining all assets needed to ensure a smooth and timely launch of campaigns. Our best-in-class higher education writers and designers will create digital ads on your behalf, across all applicable platforms, with all ads being sent for your review and approval before anything is pushed live.

**Build and launch the campaign** within one to two business days of receiving all necessary assets.

## STEP FOUR: MEASURE & OPTIMIZE

**Meet bi-monthly** to review current campaigns, plan upcoming campaigns, and keep abreast of any changes at the College.

**Provide a live dashboard** for 24/7 reporting of campaign performance and metrics.

**Monitor client campaigns daily**, manage creative and addressable list updates, and assist with digital reporting.

**Optimize campaigns based on KPIs like** impressions, click through rates, conversions and view through conversions to your website and landing pages. If any of these are underperforming, we may suggest changes to boost performance.

# Sample Timeline

**Day 1(based on availability):** Strategy meeting. Collect feedback on initial proposal. Gather additional information regarding campaign priorities, audiences, geographies, current or new media in place, upcoming events/important dates, program needs, etc.

**Week 1(sometimes in coordination with strategy meeting):** Campaign kickoff meeting. Review media plan together, collecting feedback and any additional information still needed. Set launch date.

**After kickoff meeting:** Static assets collection + technical startup. Following the discovery calls, all lists, images, data, etc., being sent from your team will be collected. Required account access should also be granted/approved. These items vary by campaign.

**First two weeks and ongoing:** Asset review + approval. All assets will be sent to you for review and approval. This is an ongoing process. Assets may include banner ads, landing pages, keyword strategy, Facebook strategy and text, etc. The majority of this phase will take place prior to launch.

**Week 3-4 (sooner if possible):** Digital campaigns live. Once tactics, channels, priority audiences, and target geographies are confirmed, campaigns will be launched.

**First month of campaign:** First full month of insights annotated in your dashboard and any initial recommendations from the digital strategist will be made. Your live dashboard will display metrics to include ad creative performance, click and conversion data, geographic focus, and traffic engagement in analytics.

**Ongoing:** The performance dashboard serves as the most transparent and up-to-date way to stay in tune with the campaign's performance. Your digital strategist will add campaign insights and note all optimizations made throughout the month directly onto the dashboard for you to review at any time. Recommendations, based on performance, will be delivered by email or on a strategy call. Calls/emails can include evaluation of deliverables, opportunities for improvement, metric highlights, creative analysis, verification of any additional timeline needs, and campaign additions or budget reallocation. Adjustments to campaign are made as needed and/or discussed in this meeting.

# Real-Time Reporting at Your Fingertips

Our live dashboard reports provide a highly visual presentation of the metrics that matter in your campaigns.

## AWARENESS METRICS

Total impressions, average impressions per day, and cost per impression give you a sense of reach.

## INQUIRY METRICS

Total actions and cost-per-action (CPA) numbers show you how many people decided to engage.

## KEY PERFORMANCE INDICATORS

Presented by device, these metrics show how effective your campaigns are based on different technology tools that your audiences are using.



## CUSTOMIZABLE DATE RANGES

You can view the performance of your campaigns for any periods of time that campaigns are running.

## CLICK METRICS

We provide full visibility into the number of clicks, click-through rates (CTR) and cost per clicks (CPC).

## BOTTOM-LINE RETURN ON INVESTMENT

Our reports show you your ultimate ROI for each campaign.



# Our Price Proposal

# Your Goals Are Our Goals

Our primary aim in this proposal is to inspire Shasta College with fresh strategies and approaches across all channels in order to increase ROI, reach desired audiences, and meet your overall enrollment goals. Our proposal includes:

- ◆ **A multichannel digital marketing strategy** to increase and enhance the regional awareness of the College's services.
- ◆ **Increase enrollment** of new students **and retention** of existing students.
- ◆ **Real-time reporting and thoughtful campaign optimizations** to ensure continuous improvement.
- ◆ Comprehensive **email and text messaging** campaign.

# Digital Media Strategy Plan

## Cross-Channel Digital Marketing Strategy

**GOAL:** Increase enrollment across all academic programs with elevated brand visibility and recognition and engagement with college events and activities

**AUDIENCES:** Prospective students including:

- Career Technical Prospects
- High School (Seniors / Dual Enrolled)
- Adults: Traditional (18-24 / High School, Some College) and Non-Traditional (25-34 / High School, Some College)
- Hispanic Students
- Funnel (Prospects, Applicants, Current Students, StopOuts)

**STRATEGY:** We've outlined integrated digital recommendations inclusive of **geofencing strategies, video, programmatic streaming audio, and conversion-focused paid social media strategies.** This plan is mindful of budget and utilizes foundational strategies that insert Shasta College at critical moments during students' online search process to drive awareness, inquiries, and application activity. The time frame proposed for open houses/events and program pathways are all dependent on the events, and program requirements (prerequisites, program application deadlines, etc.). Included in this plan are estimated time frames that will be confirmed when solidifying the media plan.

### STRATEGY HIGHLIGHTS:

- + Utilizing geofencing strategies to reach prospects while they are at home and encourage enrollment for Fall 2024 / Spring 2025 / Summer & Fall 2025
- + Leveraging streaming audio to expand awareness of Shasta College and the programs offered
- + Tapping into targeting capabilities in social platforms to target specific audiences, such as, Career Technical Education programs
- + Leveraging PPC to generate inquiries from mid-funnel users who are actively searching your brand and program keywords
- + Reaching underrepresented populations through programmatic tactics.

**LINK TO:** [Digital Media Strategy Plan Details](#)

# Proposed Digital Media Channels

| CLARUS   Shasta College  |   |        |   |         |   |          |         |   |       |  |     |      |
|--|---|--------|---|---------|---|----------|---------|---|-------|--|-----|------|
| 2024-25 Annual Plan  |   |        |   |         |   |          |         |   |       |  |     |      |
| Audience   | July  | August | September   | October | November  | December | January | February  | March | April  | May | June |
| Recruitment: 18-45, high school/ some college  | Recruitment - Fall 2024 - Geofence, Display & Video, CTV, Social Media \$15,000     |        |   |         | Recruitment - Fall 2024 - Geofence, Display & Video, CTV, Social Media \$16,500       |          |         |   |       | Recruitment- Summer & Fall 2025- Geofence, Display & Video, CTV, Social Media \$10,000 |     |      |
| Retention & Enrollment Funnel (Prospects, Applicants, StopOuts, Current Not Enrolled: lists provided by College) | Retention & Enrollment Funnel - Fall 2024 - Geofence, Display (List-based) \$17,800 |        |   |         | Retention & Enrollment Funnel - Spring 2025 - Geofence, Display (List-based) \$20,000 |          |         |   |       | Retention- Summer & Fall 2025 - Geofence, Display (List-based) \$13,500                |     |      |
| High School: 13 to 18 & Influencers  |   |        | High School Juniors & Seniors (Dual Enrollment) - Geofence, Display & Video \$2,300 |         |   |          |         | High School Seniors - Geofence, Display & Video \$1,300 |       |  |     |      |
| Hispanic Audience  | Hispanic - Fall 2024 - Geofence, Display & Video \$2,400                            |        |   |         | Hispanic - Spring 2025 - Geofence, Display & Video \$2,400                            |          |         |   |       | Hispanic - Spring 2025 - Geofence, Display & Video \$2,400                             |     |      |
| All Audiences: Awareness & Lead Generation   |   |        |   |         | Awareness & Lead Generation - PPC, WebID, Streaming, Social Media \$37,000            |          |         |   |       |  |     |      |

| Campaign CTA Key                       | Budget Total |
|--|--------------|
| Recruitment                            | \$41,500.00  |
| Retention & Enrollment Funnel          | \$51,300.00  |
| High School & Influencers              | \$3,600.00   |
| Hispanic Audience                      | \$7,200.00   |
| Awareness & Lead Generation            | \$37,000.00  |
| Campaign Setup, Management & Reporting | \$39,400.00  |
| Total                                  | \$180,000.00 |

# Carnegie Hosted Slate Instance to Support Email and Text Campaigns

## Why Slate?

- + Designed specifically for higher-education institutions
- + Fully customizable
- + Supports features to adhere to A2P and Email Deliverability protocols, including unsubscribe functionality
- + Allows for email design customization, precision delivery, and text message sending



Technolutions' first Slate Platinum Preferred Partner

## Carnegie Hosted Slate Instance

Carnegie provisions and customizes a Slate instance for your institution for email and text campaign deployment

**\$20,000**

## Twelve Month Consultation

- Copy for a bank of up to 12 emails
- Copy for a bank of up to 14 text messages
- Text message deployment of up to 25,000 sends
- Design for three email templates
- Maximum of eight hours per month of Slate consultation including:
  - Remote support to include Carnegie-Hosted Instance configuration, email and text configuration, static mailing list uploads, and message deployment.
  - Biweekly 50-minute project calls

**\$41,850**

# Total Investment

| Service                                      | Scope of Work Summary   | Cost             |
|--|---|------------------|
| <b>Digital Media Planning &amp; Strategy</b> | Development and implementation of a comprehensive digital advertising strategy inclusive of discovery, research, and recommendations. | <b>Included</b>  |
| <b>Digital Media Buying &amp; Management</b> | Inclusive of media buying, placement, optimization and reporting. Our fee for management is 28% of media.                             | <b>\$180,000</b> |
| <b>Email &amp; Text Messaging</b>            | Inclusive of Carnegie-hosted Slate instance, email and text communications.   | <b>\$61,850</b>  |
| <b>Total Investment</b>                      |   | <b>\$241,850</b> |



# Success Stories & References

# Case Study: Northeast Community College

## THE STORY

Northeast Community College, situated in Norfolk, NE, currently serves 6,541 credit students. The College experienced a decline in enrollment and had been unsuccessful with past vendors. Further, the web traffic observed by the College's CIO did not align with the reports provided to the Marketing Director by their digital marketing vendor. It was time for a change.

## THE STRATEGY

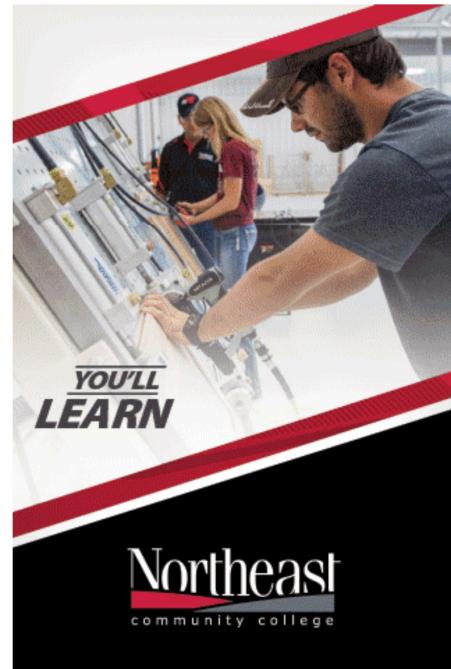
The College collaborated with CLARUS on a comprehensive plan, incorporating Google AdWords; keyword retargeting; advertising on Spotify, Pandora, and iHeartRadio; CTV/OTT, micro-targeting; social media ads; and various programmatic tactics like geofencing and behavioral targeting.

## THE RESULTS

After partnering with CLARUS, the College reversed years of declining enrollments, seeing significant improvements:

- ◆ **Overall enrollments increased by 9% compared to the previous year.**
- ◆ **Freshmen enrollment rose by 12%.**
- ◆ **Non-degree-seeking student enrollment grew by 8.5%.**
- ◆ **Transfer student numbers climbed by 5.8%.**
- ◆ **Early entry student enrollments soared by 37%.**
- ◆ Retention efforts, including geofencing the homes of students who hadn't registered, led to a **29.6% increase in returning students.**

Enrollments continued to rise, even through COVID, and now CLARUS now manages the College's entire \$200,000 media budget.



# Case Study: San Juan College

## THE STORY

San Juan College, with 6,723 credit students and over 100 programs, hosts one of the few online veterinary technology programs in the country, but enrollments for this usually waitlisted Vet Tech program were dropping. After further declines, the College urgently sought CLARUS' help.

## THE STRATEGY

First, the College created a persona for vet tech enrollees by discussing with the program's lead faculty, who identified veterans with K-9 handling experience as a key audience. They pinpointed two major military bases with extensive K-9 programs. The College aimed to boost inquiries, applications, and re-enrollments using digital strategies. CLARUS recommended tactics including geofencing the military bases to reach K-9 handlers, targeting current vet tech students and prospects for re-enrollment, and implementing programmatic search and site retargeting, all within a three-week campaign budget of \$1,200.

## THE RESULTS

We realized major successes through our efforts, including:

- ◆ **70 inquiries** from military bases
- ◆ **37 new applications** from military bases
- ◆ **31 students engaged with faculty** to complete enrollment
- ◆ **380 students enrolled** (280 students enrolled in Tier 1 classes, and 100 Students enrolled in Tier 2 classes)

Now, that's something to bark about!

The advertisement features a small, light brown puppy sitting on a white surface. To the right of the puppy, the text reads: "Sucker for a furry face? Apply to our online Vet Tech program." Below the puppy is a large white bone-shaped button with the text "Click Here". At the bottom left is the San Juan College logo, which consists of four squares containing the letters S, J, C, and a sun icon. To the right of the logo, the text "SAN JUAN COLLEGE Success Matters" is displayed.

# References

The following references represent institutions and/or projects that are similar to your institution and/or your project-at-hand:

**Jena Vogtman**  
**Northwood Technical College**  
Associate VP of Marketing and Communications  
505 Pine Ridge Drive, Shell Lake, WI 54871-9300  
p. 715.319.7181  
e. [jena.vogtman@northwoodtech.edu](mailto:jena.vogtman@northwoodtech.edu)  
Current digital client

**Erin Jellesma**  
**Montgomery County Community College**  
Director of Marketing  
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e. [ejellesm@mc3.edu](mailto:ejellesm@mc3.edu)  
Current digital client

**Erin Hergert**  
**Pueblo Community College**  
Director of Marketing  
900 West Orman Avenue, Pueblo CO 81004-1499  
p. 719.549.3226  
e. [erin.hergert@pueblocc.edu](mailto:erin.hergert@pueblocc.edu)  
Current digital client



# Team Structure

# Highly Experienced, Highly Engaged

Your CLARUS team is passionate about making a positive difference for your college.



**Dr. Kathi Swanson**  
President

Dr. Kathi Swanson brings nearly three decades of experience collaborating with community colleges and offers a deep understanding of their operational dynamics. Having engaged with over a third of the nation's community colleges, her expertise extends to marketing strategies that ensure these institutions remain up-to-date with their advertising approaches and gain valuable insights into their target audiences.



**Kristy Phillips**  
Senior Director, Client Success

Kristy is a valuable client resource for full-funnel strategies across prospective audiences. She has an unrivaled eye for building consensus and an expertise in developing positioning statements for campuses that are part of a larger university system. Her forward-thinking approach enhances recruitment strategies for first-year students and adult learners.



**Alison McLallen**  
Director, Account Management

Alison is a versatile professional who has cultivated a strong educational foundation through her studies at Arizona Western College, a community college in Yuma, AZ, and Northern Arizona University. Her diverse skill set and extensive knowledge uniquely position her to champion the missions and objectives of community colleges while working tirelessly to showcase their impact and enhance their visibility.



**Chelsie Shackelford**  
Director, Digital Operations

Chelsie is a goal-oriented digital engagement professional with an impressive array of industry certifications, notably in Google Ads Search and Display. With a background at North Idaho College, a community college in Coeur d'Alene, ID, she has actively contributed to crafting and implementing effective marketing campaigns, elevating student recruitment initiatives, and refining strategies for digital engagement.



**Ashley Macawile**  
Paid Social Media Specialist

Ashley, equipped with an associate's degree in Arts and an AGEC-A Certificate from Arizona Western College, a community college in Yuma, AZ, is committed to leveraging her digital engagement expertise to make substantial contributions to the objectives of our clients. Driven by a love for knowledge, she pursues fresh insights and avenues to support the transformative endeavors of community colleges.

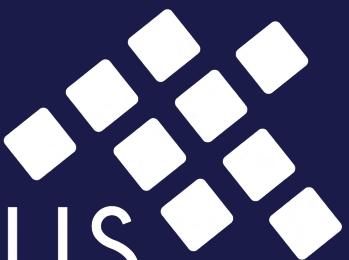


**Ashlee Sikora**  
Director, Paid Search

Ashlee is an experienced digital marketing professional specializing in PPC, with additional proficiency in Performance Max and Demand Generation. With more than nine years of dedicated service in higher education, her primary focus is assisting colleges and universities in achieving their enrollment objectives through the management of highly effective PPC campaigns.



Read more about our team at [claruscorporation.com/about/](http://claruscorporation.com/about/).



CLARUS

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[claruscorporation.com](http://claruscorporation.com)



Search + Inquiry Campaign Management

# Fort Lewis College

CARNEGIE



Jenna Gilbert  
Director of Admission  
Fort Lewis College

Dear Jenna:

## Thank you for the opportunity to submit a proposal for Student Search!

The project-at-hand has far-reaching potential for Fort Lewis College. It's an opportunity to fundamentally change the way that you think about enrollment strategy and Student Search. And we believe that we're uniquely positioned to partner with you on this transformation. Working with Carnegie, you'll:

**Embrace a philosophy and approach that is markedly different and fundamentally better than the prevailing standard.** Carnegie Student Search is counter to the traditional high-volume, high-cost, low-conversion Student Search of the past. Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks to who they are as individuals.

**Have a partner who knows you well.** Having worked closely with you over the years on CollegeXpress lead generation, we're armed with insights about Fort Lewis College. We already see ourselves as an extension of your team. And we're deeply invested in your success.

**Tap into an unmatched depth and breadth of relevant experience.** We've completed similar projects at Colorado School of Mines, Oglethorpe University, York College of Pennsylvania, Georgia Southern University and more.

Complementing the talents of your team, we'll apply our best collective thinking to the goals and opportunities at Fort Lewis College.

As you review our proposal, please feel free to contact us if you have any questions or would like additional information. Hopefully, this proposal will serve as a springboard for additional conversation and collaboration—we'd love to finalize this strategy together.

**Now, let's go!**

**Ryan Ostendorf**  
Director, Client Success  
[rfp@carnegiehighered.com](mailto:rfp@carnegiehighered.com)

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# Executive Summary

# Your goals are our goals

**Your RFP reflects your desire for new, differentiated, and more effective strategies.**

Fort Lewis College is seeking a strategic partner to provide a modern Student Search and engagement solution that combines traditional Search strategies with Digital marketing and social media.

**We understand that you need to:**

- + **Grow new student enrollments** over the next few years through a stronger inquiry pool.
- + Focus on **increasing enrollment to 850–900** per incoming class.
- + Integrate data within FLC's **Slate** instance.
- + Maintain and enhance **the geographic, socioeconomic, and programmatic diversity** of FLC's inquiry and applicant pools.
- + **Reach prospective students earlier** in the college selection process.

# Together we will collaborate

## Deploy a Modern, Yield-Focused Student Search

Together we will build a modern Student Search solution that focuses on fit, diversifies sources, differentiates by using psychometric data, deploys a 360 digital strategy, optimizes your email marketing, and focuses on increased conversions and ultimately, yield.

### We will create a solution designed to:

- + **Increase awareness and affinity** for Fort Lewis College in existing and new markets.
- + **Increase engagement** at important conversions.
- + **Optimize enrollment** by balancing both headcount and net tuition revenue.
- + **Infuse rich data into your Student Search** efforts for better strategic decision making, in flight and year over year.
- + **Dynamically engage with students** at various entry points throughout your ecosystem.

| Pillar                        | Service                                       | Scope of Work Summary   |
|-------------------------------|---|---|
| PROSPECT ACQUISITION STRATEGY | <b>ENROLLMENT STRATEGY CONSULTING</b>         | Your Enrollment Strategist will work with our subject matter experts and specialists to ensure a seamless integrated execution of your strategy.  |
|                               | <b>Premium Name Buy Consultation</b>          | Our team will review historical enrollment trends, market-by-market demographic factors key to your identification of prospects, and existing draw to list and score multiple potential locations for expansion of your efforts.  |
|                               | <b>Database Access</b>                        | Deploy an always-on strategy, for year-round inquiry delivery through CollegeXpress. Our student database is free and accessible to all students.   |
|                               | <b>Market Opportunity Indexing</b>            | Identify your best target markets for enrollment. Together we'll use these insights and your strategic goals to inform your Student Search decision making.   |
| TRANSPARENT CRM EXECUTION     | <b>Year-round Communications</b>              | Inclusive of campaign set-up, list management, attribution and tracking, email marketing, performance reporting, data import/export mapping, and creative. Campaigns include: Senior Search, Underclassman Search, Application Generation, Incomplete Application-Awaiting Submission Campaign, and Incomplete Application-Awaiting Materials Campaign. |
| PSYCHOGRAPHIC SEGMENTATION    | <b>National Student Profiles (Motivators)</b> | Utilizing proprietary methodology, we will tag your prospect and inquiry lists with what psychographic motivator they will most resonate with to guide your communication segmentation strategy.  |
| PERSONALIZED CREATIVE         | <b>Psychographic Multi-channel Creative</b>   | Designed with Motivators in mind, segmented by those profiles, and delivered as one unified experience. Email, print, digital ads, and landing pages.   |
| TARGETED DIGITAL MARKETING    | <b>List-based Tactics</b>                     | In alignment with your search communications, and your partnership with Advanced360, we will develop a list-based campaign leveraging IP Targeting and Snapchat to a subset of your lists.  |
| YIELD STRATEGY                | <b>Engagement Scoring</b>                     | Data-driven intelligence that maximizes your resources and results. Using geo-demographic data we assign a probability of application to each student.  |
|                               | <b>Retention Modeling</b>                     | Assign a retention probability to each student in your admitted or enrolled class.  |

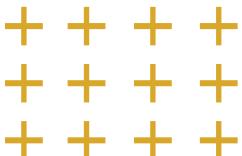
# Company Overview

# Company and Main Contact Details

## Contract + Special Provisions

The Fort Lewis College Contract and Special Provisions would be first in the order of contract precedence should Carnegie be awarded the RFP.

Additional Carnegie terms and conditions to be provided in project-specific contract.



### Carnegie

(Carnegie Dartlet, LLC)

FEIN: 85-3168237

210 Littleton Road, Suite 100

Westford, MA 01886

978.692.5092

carnegiehighered.com

[info@carnegiehighered.com](mailto:info@carnegiehighered.com)

### Main Contact

Ryan Ostendorf

Director, Client Success

513.460.2768

[rostendorf@carnegiehighered.com](mailto:rostendorf@carnegiehighered.com)

### Person Authorized to Contractually Bind the Organization

Meghan Dalesandro

Chief Operating Officer

978.692.5092

[mjd@carnegiehighered.com](mailto:mjd@carnegiehighered.com)

# Carnegie at a Glance

For more than 35 years, Carnegie has been a leader and innovator in higher education marketing and enrollment strategy, offering groundbreaking services in the areas of Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Financial Aid Optimization, Website Development, and Creative that generate authentic connections.

## **Higher Education Marketing and Enrollment Strategy**

Carnegie is the future of higher education marketing and enrollment strategy, and has been since 1985.

## **The Power of Human Connection**

We connect colleges with students through the power of human connection. We believe that genuine connection is the key to capturing attention and building affinity. We measure and then market to a student's unique behaviors and motivators to create deep connections and real conversations

## **Custom Solutions**

Carnegie builds custom solutions with best-in-every-class services in Research, Strategy, Digital Marketing, Lead Generation, Slate Optimization, Student Search, Financial Aid Optimization, Web Development and Creative that generate student connection. Our approach is data driven, personalized, targeted, and customized to solve our clients' unique enrollment needs and challenges.

## **Integrated Services for Marketing and Enrollment**

We deliver what others simply cannot because we have what others do not: original intellectual property, powerful data, precision tools, and decades of market leadership experience.

# 1985

The year our company was founded

# 41

The number of states that we call home

# 341

The number of Carnegie team members across the country

# 12

The number of higher education organizations we partner with annually including NACAC, NAGAP, UPCEA and more

# 11

The number of custom research white papers released over the last year

# 700

The number of institutions we've partnered with over the last year

# 3

The number of major conferences that we host every year

# 3

Top archetypes represented in our team: Provider, Explorer, Competitor

# 25

The number of major conferences we present at annually

# Comprehensive Services

We can meet you wherever you are in your journey. Consider our team an extension of your own – focused on your needs, dedicated to your success.

## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.

## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.

## ENROLLMENT STRATEGY

Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.

## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.

## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.

## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.

## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.

## SIGNATURE CREATIVE

By defining what sets you apart and by learning what will speak to your audiences, we create impactful messaging that builds reputation and forges powerful connections.

## SLATE OPTIMIZATION

Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.

## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.

## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.

# Project Team Staffing

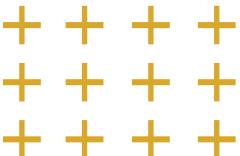
# One team, your team.

**Human Connection is what gets us up in the morning.**

We believe that genuine connection is the key to capturing attention and building affinity between students and institutions, but it's also core to who we are as a company. We build connections, relationships, and dare we say it: friendships. It's our people that set us apart.

We've assembled a team from multiple disciplines to work with you to ensure a seamless experience throughout each phase of work.

From the Client Success Manager providing strategic direction to the Account Manager keeping day-to-day tasks on track, and all the subject matter experts in-between, we are one team—your team.



# Your key contacts.



The intentional concierge to your Carnegie experience will be with you every step of the way working to ensure that our ongoing efforts align with your top priorities and Student Search goals.



Your experienced, strategic partner in shaping enrollment and financial aid strategy, analyzing performance and optimizing your Student Search efforts year-after-year.



Comprehensive partnerships require meticulous attention to detail. Your Account Management Lead will ensure regular calls and communication and adherence to established timelines.

## Focused Expertise

**Beyond your core contacts:** you'll have a team of experts working on your campaigns and directly accessible to you throughout our partnership. Digital and CRM/communication strategists with deep industry experience, world class graphic designers and writers, Web experts, and Financial Aid analysts all will be working as your team to ensure success.



**Ryan Ostendorf**  
**Director, Client Success**

Supporting clients across all of Carnegie's solutions and services, Ryan Ostendorf brings collaboration, energy, and empathy as he works with clients to streamline and transform their enrollment and marketing strategies. Ryan carries a wealth of knowledge around Slate optimization and brings a unique skillset to help clients leverage and integrate their overall enrollment and marketing strategies. Prior to Carnegie, Ryan worked within admissions, communications, and marketing at the College of Wooster, helping to enroll some of the largest and most diverse classes in the College's history.



**Elizabeth Gross**  
**Executive Director of Enrollment Data, Strategy, and Analytics**

As the Executive Director of Enrollment Data, Strategy, and Analytics for Student Search at Carnegie, Elizabeth develops comprehensive Student Search programs. With 10 years of experience in higher education and a background in data science, Elizabeth translates complex enrollment information into actionable insights and crafts customized data-driven strategies that support client goals and optimize enrollment outcomes. She also collaborates with the data team to identify and implement best practices for effective and efficient campaigns that meet the unique aspirations of each client.

## Meet Your Leadership Team

# CARNEGIE



**Mike Matthews**  
EVP, Enrollment & Data Services



**Alexa Poulin**  
Chief Digital Officer



**Ian Strawn**  
VP, Creative



**Katie Sentissi**  
VP, Digital Strategy



**Jess Severt**  
AVP, Slate Communications



**Mike Keane**  
SVP, Modeling + Client Strategy

Mike Matthews is the Executive Vice President of Enrollment & Data Services overseeing Carnegie's non-Slate delivery and strategy team. Before joining Carnegie, Mike led enrollment services at Fire Engine RED and was the Director of Student Search Service at the College Board. Mike has worked in higher education for 25 years.

Alexa Poulin manages the daily operations of Carnegie's leading-edge Digital marketing team. She understands the complexities of recruitment and enrollment marketing challenges, as a former collegiate director of marketing with more than 20 years of student-facing marketing experience. Alexa also serves as a board member of the American Marketing Association, working alongside colleagues to plan and execute AMA's annual Higher Ed Symposium.

A former worldwide exhibiting fine artist, Ian Strawn now plies his creative talents in the oversight of Carnegie's multimedia designers, producers, directors, artists, and technicians. A graduate of Brigham Young University, Ian is now a 15-year veteran of the creative marketplace. He has served in the capacity of designer, strategist, marketing director, art director, creative director, and start-up entrepreneur. Ian applies a unique mix of both creative thinking and analytical strategy, pushing each project to the most on-brand outcome.

As AVP of Digital Strategy, Katie collaborates with clients to create comprehensive digital advertising campaigns that are aligned with each institution's objectives and enrollment goals. She has worked in digital marketing for more than nine years and specializes in innovative digital marketing strategies, strategic campaign development across paid search, display, social media, and streaming services. Her vital role as a liaison between the client and the Digital team provides a seamless process, from campaign implementation to optimization and analysis..

Jess oversees Carnegie's Slate Communications team, setting up and executing application, yield, anti-melt, and stakeholder-specific communications for clients. Jess joined Carnegie with experience in marketing and communications and admissions at Ball State University. She holds degrees in telecommunications and executive development for public service.

Mike leads modeling projects for clients, provides financial aid policy and operations expertise, and advises on a range of topics within enrollment management. Previously, Mike served as the Assistant Vice Provost for Financial Aid at Loyola Marymount University, where he led a financial aid team of more than 20 staff members and oversaw an aid portfolio exceeding \$240 million. Mike has 12+ years of experience in enrollment data collection, analysis, and reporting. Mike has a Ph.D. in Political Science from the University of Notre Dame and a B.A. in History and Latin from Loyola Marymount University.

# Scope, Approach, and Methodology

# A Modern Approach to Student Search

## Always-on, data-driven, yield-first.

*Our Student Search is counter to the traditional high-volume, low-conversion Student Search of the past. Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.*

### **This Student Search is focused on yield.**

*Our philosophy is to recruit yield always in mind.*

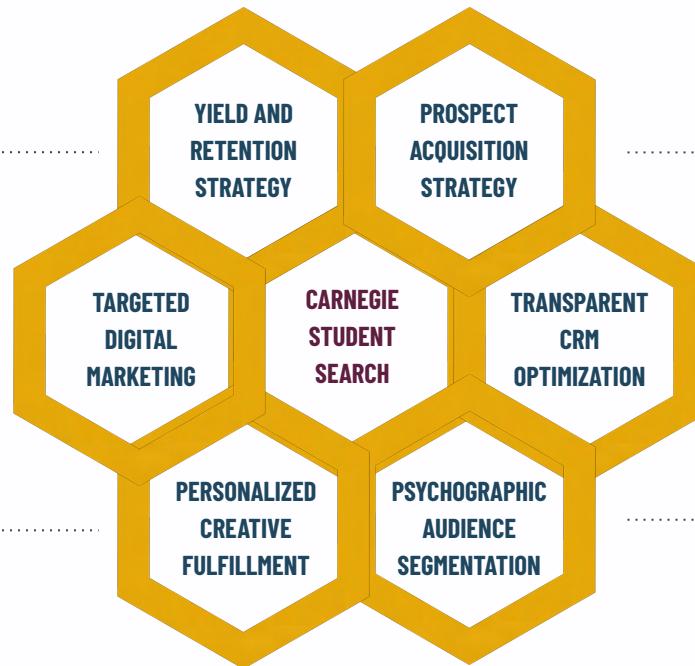
- + **Focus on fit** You'll focus time and energy on where it matters most: recruiting the best-fit students starting with strategic name buys.
- + **Differentiate** You'll capture attention and build human connection with psychometric segmentation and personalized creative.
- + **Always on/Digital-First** You'll meet students where they are and when they are ready with digital marketing and dynamic communications.
- + **Diversify** You'll diversify your lead generation with digital ads, robust form strategy, and student database access.
- + **Leverage the Power of rich CRM data** You'll gain data transparency and we'll ensure that your data is transferred with the rich data collected along the way.

# Carnegie Student Search

This is data-driven decision making at its best. We identify who is most likely to apply, what amount of aid a student needs to enroll, and who needs intervention in order to retain. For Carnegie, Student Search strategy is retention strategy.

We'll deliver the right message to your Student Search list at precisely the right time. You'll be supported by a digital team with unparalleled experience who will ensure your results.

We work across print, web, social, and digital channels to bring your authentic personality to life for your audiences in ways that inspire and move them to action.



We help you source, identify, and cultivate students who are best-fit for your institution, through a student-centric, market-mindful model that emphasizes yield and optimizes your Student Search budget.

Your Student Search will be fully transparent, fully optimized, and fully supported; and what's more, you own it! We will deliver a return on investment you won't find anywhere else.

Our archetype-based personas use psychometric data to deliver advanced segmentation and truly personalized communications.



# Enrollment Strategy Consulting

Student Search needs a constant hand on the wheel—we provide that steady hand to ensure your success. We will begin by building a custom Student Search Strategy for Fort Lewis College based on our wealth of experience, best practices and alignment with your goals. Your Enrollment Strategist will work with our subject matter experts and specialists to ensure a seamless integrated execution of your strategy. They will know your campaigns, review performance data and make sure to bring optimizations and insights to your discussions. You will benefit from our channel specialists and also have a main point of contact for strategic pivots, questions from the board, and performance reviews.

## **BENEFITS OF CARNEGIE STUDENT ENROLLMENT CONSULTING:**

- Partner with our tenured enrollment leaders on a modern Student Search
- Rely on their strategic oversight of your work
- Know you have a single person to call to talk strategy, performance, and what's next!

We help you source, identify, and cultivate students who are engagement inclined for Fort Lewis College, moving away from the traditional high-volume, lower-conversion Student Search of the past and toward a more innovative and student-centric, market-mindful model that emphasizes yield while optimizing your Student Search budget.



### Prospect Acquisition Strategy

#### Market Opportunity Indexing

Bolt on rich and predictive datasets to your enrollment data to identify your best target markets for enrollment.

#### Premium Name Buy Consultation

We will deliver a name purchasing model based on your enrollment data and market intelligence analysis to ensure that your selections are precise and have the highest likelihood of conversion.

#### Student Database Access (CollegeXpress)

You need student names. We offer a reliable student name source to augment your list strategy for Student Search. Deploy an always-on strategy, for year-round inquiry delivery. Our student database is free and accessible to all students.

# MOI: Market Opportunity Index

**Always-on, data-driven, yield-first.**



- + Leverage this data-driven market knowledge in strategic name purchases, territory management and travel planning, and digital spend prioritization—to name a few benefits.
- + Access rich data like household income, racial diversity, and high higher ed index for opportunity identification, audience prioritization, and marketing execution.
- + Lean on our team of consultants to bring identified opportunities and your strategic plans in line for maximum impact.

# Strategic name buy consultation

## Always-on, data-driven, yield-first.

*Combining the results of the MOI, this is the smartest way to expand your reach and to realize your Student Search potential. Bolt on rich datasets to your enrollment data to identify your best target markets for enrollment. Together we'll use these insights and your strategic goals to inform your Student Search decision making. This is data-driven decision making at its best.*

- + Built on historic enrollment data, market research, and a channel analysis your model will reflect an ecosystem approach to recruitment.
- + Student Search criteria and recommendation will consider demographic, academic, socioeconomic, and source variables.
- + Our recommendations will be data-driven and consider national trends, opportunities, and comprehensive sourcing options.
- + Managed by our team, your names are fully integrated in your Slate instance—from mapping to reporting.
- + Our purchasing strategy includes multiple executions and ongoing monitoring for optimization.

# Prospective student database access

## Always-on, data-driven, yield-first.

You need student names. As you are aware from our current partnership, we offer a reliable student name source to augment your list strategy for Student Search. Our solution is CollegeXpress—The most comprehensive, multichannel, recruitment tool available to colleges and universities. As part of this search proposal, we will incorporate your current CollegeXpress contract into our search offering.



- + Deploy a year-round inquiry lead generation and delivery with access to over 6 million users.
- + Build an ongoing and strong multi-cycle pipeline from freshman to seniors.
- + Shape a diversified student pool—CollegeXpress is free and accessible to all students.
- + Attract hand-raisers with targeted email marketing and on-platform digital advertising.
- + Segmentation from gender and geography to academic interest and aptitude.
- + Directly upload qualified inquiries into your CRM, including data mapping, origin source set-up, and future performance reporting.

**Your Student Search will be optimized, fully-supported, and will deliver a return on investment you won't find anywhere else.**

**Prospect to Inquiry Campaigns**

Underclassmen + Senior

Campus visit focused messaging for pre-applicant students

**Application Generation Campaign**

Messaging driving submission, and application completion.



**A Transparent Student Search**

**Campaign Set Up**

Your content and messaging strategies alongside campaign designs will be fully implemented by the best CRM team in the entire industry.

**Data Transparency**

You will own all of your data, commflows, and frequencies. We will make sure you have all the rich data from your Student Search efforts at your fingertips to make any adjustments.

**Fully Supported**

Lean on us for the full implementation of your Student Search email campaigns, reports, and ongoing consulting on your integrated strategies to realize goals.

# Transparent CRM execution

## Always-on, data-driven, yield-first.

A transparent Student Search empowers you to take ownership of your Student Search, while also providing the expert support you deserve. Your Student Search will be seamless, optimized, fully-supported, and will deliver a return on investment you won't find anywhere else.



Technolutions' first Slate  
Platinum Preferred Partner

- + Built entirely in your instance—by the best Slate team in the industry:
  - + List management and segmentation
  - + Attribution and tracking
  - + Email marketing
  - + Real-time reporting
  - + Print Management
- + Own ALL your data, securely in your system—no data transfers needed.
- + Lean on us for the full implementation of your Slate Student Search and ongoing consulting on your Student Search strategy:
  - + On-going support provided via regular calls addressing campaign performance and optimization recommendations.

## Deliver the personalized experience students are asking for and stand apart from your competition.

By combining student demographic and psychographic data-like personalities, motivations, and beliefs—we deliver student profiles and custom audience segmentation which ensures your Student Search campaigns capture attention.



### Psychographic Segmentation

#### Cut Through the Noise

More volume is not the answer. With fewer students receiving more communications from more institutions, it's time to target the student and the message.

#### Personalize Content

Our proprietary, archetype-based personas use psychometric data to deliver advanced, custom, variable, and truly personalized communications to your audiences.

#### Engage at the Prospect Level

Demographics help us locate students, but psychometrics give us the intel on what to say. Even at the prospect level, we can create content strategies that get at student interests and motivations.

# Psychographic Segmentation

## CARNEGIE MOTIVATOR

Your audience expects more from your Student Search communications, and with advanced segmentation, you can deliver the personalized experience they are asking for and stand apart from your competition. By combining prospective student demographic data and psychographic data—like personalities, motivations, and beliefs—we deliver turnkey student profiles and custom audience segmentation.

- + Deliver truly personalized communications with Psychometric segmentation—only found at Carnegie.
- + Tagged with 3 National, turn-key profiles, your names are ready for segmentation and variable content strategies.
- + Lean on our creative team to write and design communications personalized with your student Motivators.
- + Variable email, digital ads, print, and landing pages.
- + Integrated into your CRM, Motivator profiles offer sophisticated yet simple reporting and communication segmentation.



**We work across print, web, social, and digital channels to bring your authentic personality to life** for your audiences in ways that inspire and move them to action.



### Personalized Creative

#### Creative Fulfillment

Recruit to retain by delivering creative throughout the enrollment cycle with a clear and concise message that is authentically you.

#### Psychometric and Multi-channelled

Whether through email drips, print pieces, digital tactics, or web pages and portals we deliver unique and personalized creative that is consistent, elevating your brand presence and increasing engagement.

#### Website Personalization + Attribution

On site text and image customization/Full lifecycle tracking.

# Motivator-driven creative production

**Sometimes good research gets a bad reputation for not being actionable. The Carnegie Motivator bucks that trend because it was designed to be one of the most unique and versatile variables in your CRM.**

The Carnegie Motivator is designed to alleviate the stress of fixing a voice to your message and matching that voice to an audience. Any comm-flow to students can be segmented by the optimal personality lens. While the nuts-and-bolts message of a student touchpoint could be the same (for example, an email about your early admission process), key images, words, and topics can be tailored to each motivational segment.

- + Deploy a unified, multi-channel creative and fulfillment.
- + Get strategic recommendations on print communications, in order to maximize your print budget.
- + Set your institution apart from competition with creative designed for your student Motivators.
- + Lean on our communication strategists for optimized fulfillment.
- + Fully executed underclassman and senior Student Search—in your instance.

**We'll deliver the right message to your Student Search audience at precisely the right time.** You'll be supported by a team with unparalleled experience who will ensure your digital Student Search efforts get great results.



### Targeted Digital Activation

#### Lis-based Digital Targeting

Focus on yield by meeting students where they are, and continuing to be accessible with a full life cycle, always on strategy.

Integrated with our Market Intelligence, Audience Segmentation, and Slate reporting, your digital execution will be precise and effective.

# List-based Digital

**We'll deliver the right message to your Student Search list at precisely the right time.**

Your campaigns will be supported by the best team in the business, who will ensure your digital Student Search is first-class. Fully integrated with our Market Intelligence, Audience Segmentation, and Slate reporting, your digital execution will be precise and effective.



- + Deploy a strategic approach in alignment with your communications strategy and partnership with Advance 360.
- + Leverage precise targeting, at home and on mobile devices.
- + Access and influence stakeholders online.
- + Present a unified brand experience from digital to print.
- + Integrate Slate landing pages for:
  - + Real-time inquiry tracking in your CRM
  - + Automated communication triggers

**This is what we call data-driven decision making at its best.** We work to identify students who are most likely to apply, exactly what precise amount of aid an individual student needs to enroll, and who might need intervention in order to retain. This is where your Student Search strategy becomes your enrollment strategy, and you recruit to retain.



## **Yield and Retention Strategy**

### **EnGauge Apply Scoring**

Custom modeling that combines student-level attributes, third-party geodemographic and consumer behavioral data, and rich data on your prospects' own engagement with your institution to produce a score that captures the likelihood that each student will convert to an applicant.

### **Retention Modeling**

Assign a retention probability to each student in your admitted or enrolled class.

### **Individual Financial Aid**

Money matters. It's your number one yield tactic, which is why it ought to be precise. We deliver individual aid strategy—not only customized for your institution, but customized for every student.

# EnGauge Apply Score

**We are scoring student's propensity to apply by measuring their engagement with your institution.**

EnGauge Scores are a feature of Carnegie's Student Search solution. The EnGauge Apply Score is the powerful combination of behavioral data (or affinity data) and our Lead Score (geodemographic information). The EnGauge Apply Score can be used to make strategic decisions about how you deploy your resources—where exactly to spend your time and money in your student recruitment efforts. These strategic optimizations will lead to increases in conversions throughout the recruitment cycle.

- + Identify and prioritize highly-engaged prospects.
- + Focus your resources on the students who need contact to convert.
- + Inform communication segmentation, recruitment and marketing plans, and intervention tactics.
- + Lean on our team of consultants to deliver the data as well as the action plan.
- + Increase engagement and conversions throughout the student enrollment journey.

# Retention Modeling

**Another opportunity to effect change with better data.**

Retention Modeling assigns a retention probability to each student in your admitted or enrolled class. With this data, you have the opportunity to apply interventions like additional aid, advising, or counseling services which will **increase your ability to retain at-risk students.**

- + Know each student's likelihood to persist and retain.
- + Use this rich data to focus resources on the students who need the most support.
- + Lean on our team to analyze data and inform strategies.
- + Decrease melt and increase retention.
- + Leverage this tool as early as the admit stage or later in the first year of enrollment.

# Financial Aid Optimization Capabilities

# Individualized Financial Aid

*No more oversimplified, generic grids—leverage a financial aid model that is built for you. Make in-cycle optimizations while you monitor and adjust based on performance and desired outcomes.*

- + Know each student's greatest likelihood to persist and retain.
- + Match each student to an aid award that maximizes their enrollment probability.
- + Deliver financial aid awards that are precise—don't over or under spend.
- + Maximize rich data to focus on students who need the most support.
- + Improve yield with integrated, start to finish Carnegie solutions and strategies.
- + Allow integrated goals to inform aid strategies.

# Carne<sup>ie</sup> FAO Differentiators

*No more oversimplified, generic grids—leverage a financial aid model that is built for you. Make in-cycle optimizations while you monitor and adjust based on performance and desired outcomes.*

1. We begin with Net Tuition Revenue maximization.
2. We integrate first-year retention modeling directly into every project.
3. We include application conversation modeling with each project.
4. We utilize institutional, external, and proprietary geodemographic data.
5. Mid-cycle adjustments made possible through the use of a live simulation dashboard.

# Proposed Schedule

# Our Proposed Process



## DISCOVER

In discovery, we'll review project goals, timelines, and dive into your brand voice, data set-up, and more.

### **Key activities will include:**

- + Kick Off and Discovery meetings
- + Asset exchange (data)
- + Motivator set-up
- + Digital audience specifications
- + Market confirmations
- + Timeline creation



## STRATEGIZE

We'll derive insight from the Discovery process and create a custom, tailored Student Search Strategy for you.

### **Key deliverables will include:**

- + Name Purchasing Model + Lead Scoring Analysis
- + Market Opportunity Report
- + Persona Segmentation
- + Communication Plans



## ACTIVATE

We'll produce persona driven creative assets and then deploy them throughout your enrollment ecosystem.

### **Those assets will include:**

- + Dynamic Slate emails + campaigns + segmentation
- + Personalized print pieces



## MEASURE

After deployment we'll provide you with regular reports and recommendations for campaigns in flight.

### **Reports will include:**

- + Custom dashboards
- + Engagement benchmarking
- + Conversions reports
- + Recommendations and pivots
- + Ongoing optimizations



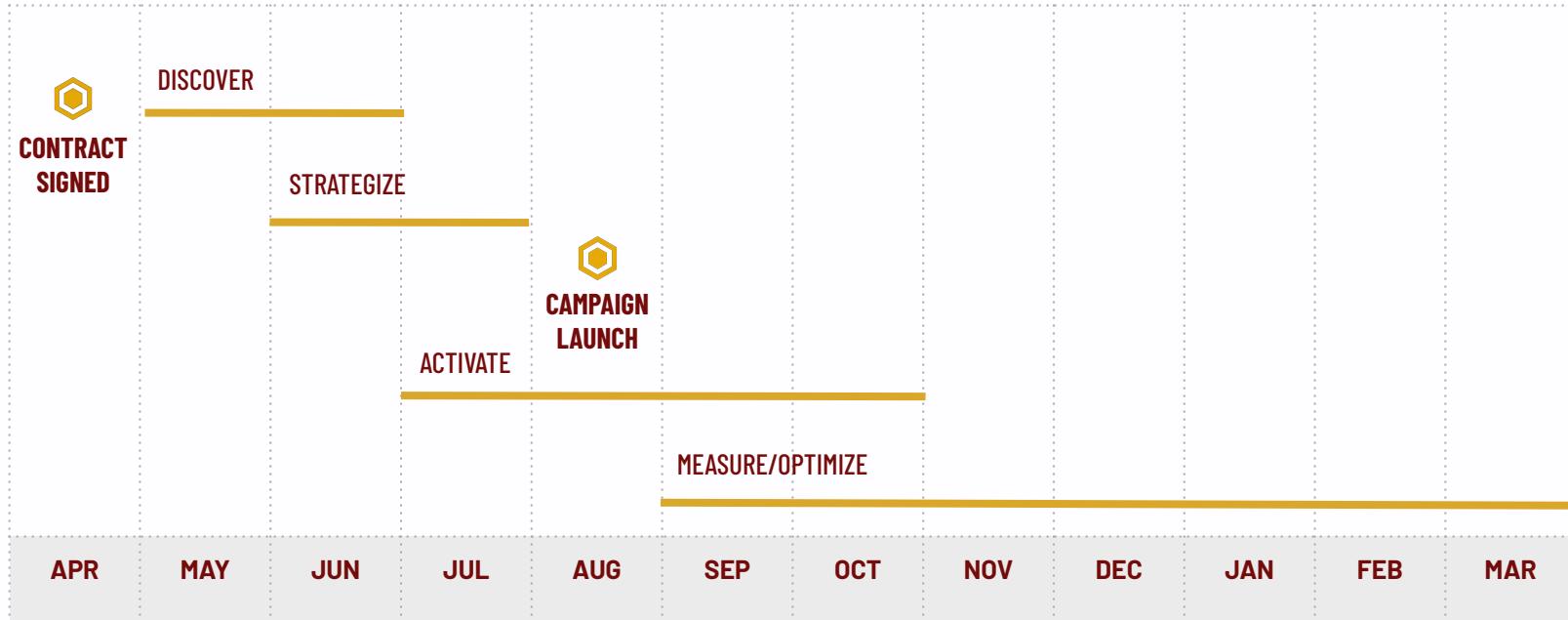
## OPTIMIZE

Iterative improvement is essential to maximizing your efforts over time. We will provide ongoing consultation.

### **Support will include:**

- + Email campaign implementation
- + Name Buy strategy
- + Market Opportunity
- + Segmentation

# Carnege Student Search Timeline



# Pricing

# Annual Investment

| INVESTMENT   | Carnegie Services     | Estimated Print Costs* |
|--|-----------------------|------------------------|
| <b>TOTAL ANNUAL INVESTMENT</b><br>1 YEAR AGREEMENT | <b>\$345,435/year</b> | <b>\$30,500/year</b>   |
| <b>TOTAL ANNUAL INVESTMENT</b><br>2 YEAR AGREEMENT | <b>\$338,253/year</b> | <b>\$30,500/year</b>   |
| <b>TOTAL ANNUAL INVESTMENT</b><br>3 YEAR AGREEMENT | <b>\$331,070/year</b> | <b>\$30,500/year</b>   |

*Our solution is scalable based on further conversation around your needs.*

\*More details below

## SAMPLE COST ESTIMATE (Slate Print)

While we typically recommend Slate Print, we can also work with other preferred printers as requested or needed by Fort Lewis. Note postage estimates are based on nonprofit standard postage rate.

| Piece                           | Quantity         | Total Cost (print + postage) |
|---------------------------------|------------------|------------------------------|
| Senior Search Postcard          | 20,000 (digital) | \$8,600                      |
| Underclassmen Search Postcard   | 50,000 (offset)  | \$19,500                     |
| Application Generation Postcard | 5,000 (digital)  | \$2,400                      |
|                                 | <b>TOTAL</b>     | <b>\$30,500/year</b>         |

# Acceptance Period

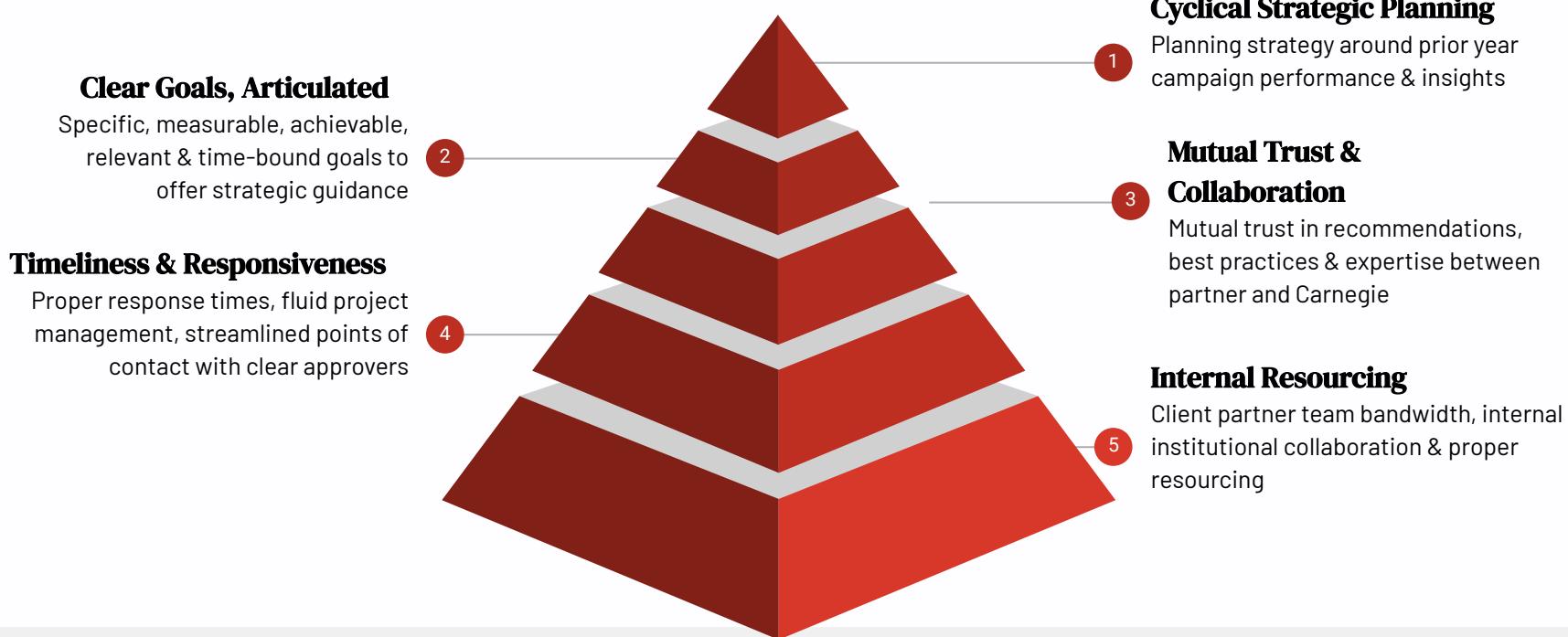
# Partnership Expectations

## A mutual commitment and platform for accountability

- + In all our communications we commit to being **responsive and timeline-minded**, setting realistic expectations and paying attention to dependencies.
- + In feedback sharing, we commit to being **clear and decisive**, ensuring that the feedback is actionable and we're accountable to the downstream effects of those decisions.
- + In our discovery and planning conversations, we commit to being **transparent and collaborative**, recognizing that our solutions are most effective when we all understand the full scope of complexity of each challenge.
- + In choosing to partner together, we will be **confident in each other's expertise**, and in doing so, giving respect to all team members, withholding premature judgement, and being receptive to new ideas.

# Partnership Expectations

## Carnegie's Hierarchy of Integration



# | Case Study + References

# Gettysburg College

**“Student Search through Carnegie gives us consistency of message, creativity, flexibility, and knowledge of best practices and insights about what’s working and what’s not. We love that everything is in Slate, and while we have plans outlined, we can also pivot and adapt when needed.”**

**Gail Sweezy**

Dean of Admissions,  
Gettysburg College

When Gettysburg College needed a marketing and enrollment strategy partner to mobilize its strategic plan for enrollment success, they looked to Carnegie.

## ⊕ The Strategy

Gettysburg, a long-time partner of Carnegie, knew that to be competitive in their marketplace, they needed to better understand their market and how best to communicate the value of a Gettysburg education. Gettysburg's enrollment and marketing leadership came to Carnegie with a new strategic plan and some new ideas about how they might connect with prospective students—but they wanted to test their plan in the market. Together, Carnegie and Gettysburg rolled out a custom research project comparing Gettysburg's standing amongst its competitors. This project provided invaluable insights into the themes and messages that would not only attract students but also distinguish Gettysburg from the competition. With these findings, Gettysburg launched a new messaging campaign in December of 2022.

To broaden its reach and make a lasting impression, Gettysburg expanded its paid digital strategy to include a blend of SEO, PPC, IP Targeting, and social media platforms, including Facebook, Instagram, Snapchat, YouTube, and OTT into its marketing mix. The implementation of GA4 and Carnegie Clarity played a critical role in this phase, ensuring optimal investment returns through precise measurement, attribution, and enhanced on-site personalization. This holistic digital strategy paid off, with a remarkable 86% increase in new site visitors, 69% of which were directly attributed to Carnegie-Gettysburg campaigns. A key component of Gettysburg and Carnegie's multi-layered marketing + enrollment strategy was the focus on inquiry acquisition through CollegeXpress, Carnegie's student database and lead generation platform. This initiative proved successful, with 15% of Gettysburg's admitted students and 9% of those who deposited being sourced through CollegeXpress.

Further integrating their strategy, Carnegie leveraged Gettysburg's Slate instance to launch Sophomore, Junior, and Senior Student Search communications. Carnegie's Slate team designed Slate communications campaigns in the client's instance, giving Gettysburg real-time insights into campaign performance and rich behavioral data about their potential incoming class. This integrated marketing and enrollment effort helped Gettysburg achieve its 2023 enrollment goals.

## The Results

Carnegie's partnership helped Gettysburg reach and engage its prospective student audience, as demonstrated by digital, communications, and inquiry-sourcing outcomes. Overall Gettysburg saw a 4% increase in YOY inquiries, a 23% increase in submitted applications YOY, and a 3% increase in admits YOY. Gettysburg also saw an 86% increase in new website visitors, with 69% of website traffic through marketing campaigns attributed to Carnegie. CollegeXpress generated strong engagement as demonstrated by its role in Gettysburg's inquiry pool, with CollegeXpress leads making up 15% of admit/matrics, and 9% of deposits pending for Fall 2023.

**4%**

increase in YOY inquiries

**23%**

increase in submitted applications YOY

**3%**

increase in admits YOY

**86%**

increase in new website visitors

**15%**

admit/matrics sourced via CollegeXpress

# References

## Gail Sweezey

Dean of Admissions

**Gettysburg College**

300 North Washington Street  
Gettysburg, PA

717.337.6100

[gsweezey@gettysburg.edu](mailto:gsweezey@gettysburg.edu)

**Scope of Work:**

Gettysburg College works with Carnegie for full-funnel Student Search, in addition to CollegeXpress lead generation and admitted student research. Carnegie's partnership has helped Gettysburg reach and engage its prospective student audience, as demonstrated by digital, communications, and inquiry-sourcing outcomes.

## Jason Black

Vice President for Enrollment Management

**Samford University**

800 Lakeshore Drive  
Birmingham, AL 35229

205.936.2441

[jjblack@samford.edu](mailto:jjblack@samford.edu)

**Scope of Work:**

Over several years, our work with Samford has spanned our full creative portfolio of services, including Brand Personality, Athletics Logo Development, Institution Logo Development, Creative Blitzes, Campaign Development, Print Collateral, Digital Content, Photography, Microsites, and Student Search Campaign Emails.

## Alejandra C. Sosa Pieroni

Executive Vice President, Division of Enrollment, Marketing, and Student Success

**Georgia Southern University**

1332 Southern Drive  
Statesboro, GA 30458

513.635.8409

[asosapieroni@georgiasouthern.edu](mailto:asosapieroni@georgiasouthern.edu)

**Scope of Work:**

Georgia Southern University works with Carnegie as a full-service integrated partner. Our scope of work has included, but is not limited to, web consultation, digital marketing, brand personality and creative, Slate consultation and communications, Slate Reporting, and Slate portals.

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# CARNEGIE

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# University of Portland

Proposal

**Brand Research,  
Strategy, and Creative**



CARNEGIE

# Thank you for considering Carnegie to refresh your brand!

We realize how significant a brand project is for the University of Portland and that you expect to be wowed. That you want a partner who is going to push you creatively and align seamlessly with your web project, while also garnering cross-campus buy-in and excitement.

There is no more important time to ask the questions: Who is the University of Portland and who do we want to be? That is where our work together begins.

Dear Mai Nhia and Greg,

Your website is the gateway to your brand, so we commend you for having the foresight to review them in tandem. There has never been a more important time to speak to your multiple audiences in a highly personalized and emotive way - with authenticity and confidence. We are uniquely qualified to help you do just that, to boldly tell your story in a way that resonates, engages and motivates to action. How do you cut through the noise and make real gains that will move the needle? You need a partner who understands your marketing and enrollment challenges and knows how to solve them to maximize your draw-regionally and nationally.

In this proposal, you'll find our recommended paths forward for your Brand Refresh project. Our revolutionary research is unrivaled, and we originated the most advanced personality definition model in the industry. With its more than 7,000 possible solutions, we tap into the core DNA of what makes the University of Portland different from your competitors. That work will then form the foundation for creative work and visual identity exploration.

The following proposal lays out our proposed process, budget, and timeline and offers some examples of our most recent and relevant client partnerships. We are excited to use this proposal as a springboard for further discussion—we want to ensure that we tailor the final scope of work to your exact needs.

Go Pilots!

Nicole

**Nicole Vilegi-Sandage**

Director of Client Success

[nvilegi-sandage@carnegiehighered.com](mailto:nvilegi-sandage@carnegiehighered.com)

303-903-6294

# Proposal Contents

Our mission is to help our clients understand who they are, who their audiences are, and how to forge powerful and enduring relationships. We offer a comprehensive and integrated portfolio of services that generate results for whatever challenges you may face. We invented our proprietary methods and tools because nothing like them existed in the marketplace to provide solutions.

Our talented force of strategic thinkers are passionate about your triumphs. We stack your deck by employing industry leaders and insiders who not only love to succeed but also love to help you change the game. This is how we earn your trust as an invaluable strategic partner.



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# Your Goals + Opportunities

The landscape of enrollment is ever shifting, and we are here to help chart a path forward to meet your goals.

# Your Goals + Customized Solutions

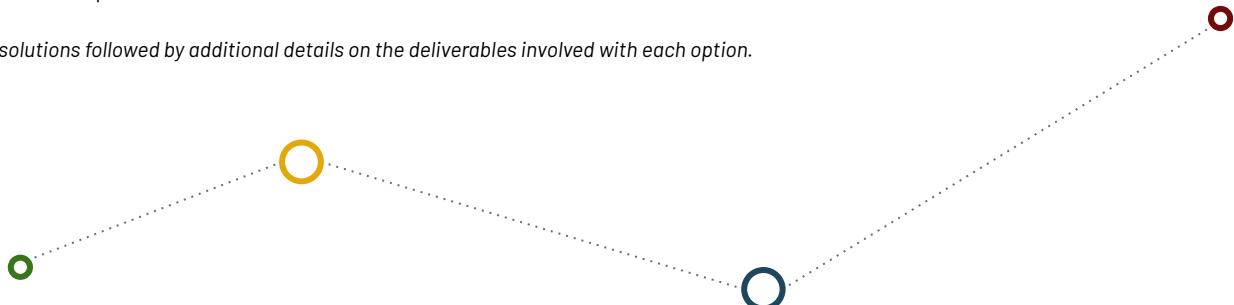
At Carnegie, we pride ourselves on our customized and integrated approach. This means that while we offer hundreds of marketing and enrollment solutions, our team of experts has selected the optimal solutions to meet your specific needs. Given the scope of a comprehensive brand and website project, we want to offer custom solutions that meet your timeline and budget. To that end, we are providing two different options to meet your needs, identified below.

## What You Need:

**We understand from our discussions that you have the following goals for this project and for your institution:**

- + Gain consensus for consistent brand expression
- + Refresh the brand to align with the investment in the website
- + Build a visual brand and brand messaging system that can be executed consistently across departments
- + Develop strategies to differentiate from the competitive set
- + Develop strategies to increase brand awareness and reputation

*The following pages provide an outline of the two solutions followed by additional details on the deliverables involved with each option.*



# Custom Solution A: Brand Refresh + Execution

Our brand definition process is highly effective and methodical. In this work, we'll engage your stakeholders, leverage rigorous qualitative and quantitative research, and arrive at a brand strategy that is unique, resonant, and lasting.

# Customized Solution: Option A

Based on the goals outlined in the preceding section, we have crafted two possible solutions for you. Custom Solution A includes not only the development of a powerful brand strategy, but also some foundational brand expression elements to serve as a springboard for the website and other marketing endeavors on the horizon. Included in this option:

## Brand Development

### Initiate qualitative and quantitative research with internal stakeholders

- + Align internal brand aspirations for who the University of Portland desires to be
- + Ensure the final brand approach has maximum authenticity

### Conduct an online market perception study with external audiences

- + Understand institutional strengths and weaknesses by market and demographic

### Analyze the brand expression of your institution against competitors

- + Identify gaps and opportunities in brand positioning to own a unique market position
- + Prioritize strategies and tactics that will move the needle the most

### Create a robust brand messaging platform

- + Develop brand messaging that aligns internal stakeholders and establishes your unique position in the market

### Audit visual identity to convey new market positioning

- + Understand the pros and cons of your current visual brand
- + Learn how to enhance the vibrancy of your visual brand expression based on data from the brand research

### Develop brand standards for consistent brand expression

- + Provide the tools staff need to express the brand consistently across channels and mediums

### Develop campaign concepts to express the visually refreshed brand

- + Improve brand reputation through vibrant brand expression that engages audiences

### Create messaging playbook to provide audience-specific content for new brand and brand concept

- + Increase message personalization and consistency with expanded ready-to-use copy for important audiences

# Carnegie's Approach to Creating Leading Brands

Our distinctive psychological approach to brand storytelling has evolved over 20 years into a first-of-its-kind psychometric marketing model. Psychometrics is about understanding who you are to create a human connection that engages your target audiences and drives action. **This empowers your team to make 1:1 connections—even when you're talking to thousands.**

Understanding who you are as an institution begins with our nine archetype system that provides easily recognizable and understandable ways to represent vast amounts of information. We combine this with the power of over 100 possible brand traits and uncover the ones that are most powerful at your institution. This framework creates more than 7,000 potential combinations of authentic brand personality that are further tailored through an institution's brand promise and brand pillars.

**The result is a brand personality that only you can truly own.**



## Research

Rooted in personality science, our research model analyzes data from internal stakeholders, external markets, and competitors to define your unique market position. We humanize your institution from within, building consensus and unifying your stakeholders with unmatched potency.

## Strategize

With robust data in hand, we will craft unique insights and recommendations to guide your brand implementation. We will then build a custom brand messaging platform that positions you strategically, empowers your storytelling, and connects you to key audiences.

## Activate

Turn strategy into action by understanding how to fully activate your brand. Carnegie will support operationalizing your brand through training, brand governance, and other support services to empower internal stakeholders to "live your brand."

## Express

With internal stakeholders aligned, it's time to express the brand to external audiences. Our exceptional creative team will craft your unique story with powerful, engaging design and imagery for meaningful brand expression across channels and mediums.

# Phase I: Research

## *Personality Science*

The foundation of our brand strategy work is a three-pronged research methodology.

**Deliverables include:**

### + Internal Stakeholder Research

Understand who internal stakeholders say you are.

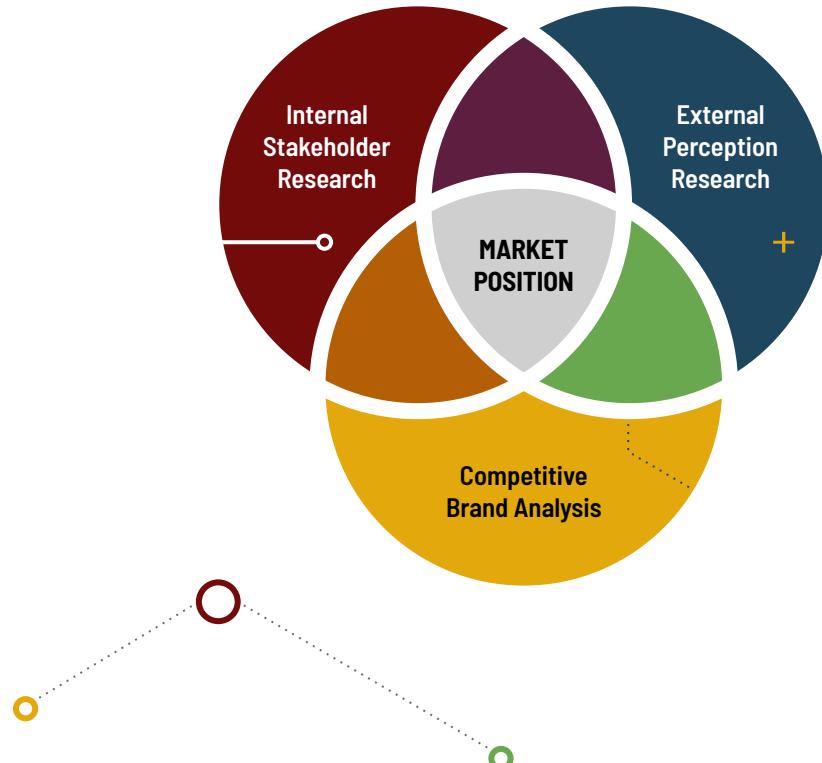
### + External Perception Research

Learn who the external market perceives you to be.

### + Competitive Brand Analysis

Discover how you can tell your authentic story in a competitive landscape and stand out for all the right reasons.

**This unique combination of data points creates your optimal market position.**



Custom Option A | Phase I: Research

# Internal Stakeholder Research

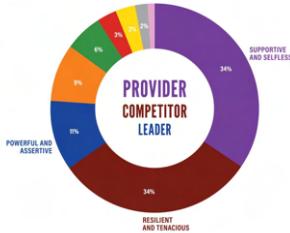
We know that you have key stakeholders that need to be engaged in any brand strategy project and our interactive workshops are the perfect forum to gain their insights in a structured and productive way. Involving their voices early in the project will help increase buy-in and lay a foundation of understanding that will facilitate the eventual roll out of your brand strategy.

## You will gain:

- + Internal consensus on the direction of the brand project
- + Data to ensure authenticity of brand personality
- + Leadership buy-in for eventual brand implementation

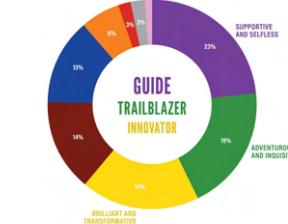
## Includes discovery of:

- + Your institution's potential archetypes
- + Archetype-based traits and faults
- + Trait groupings and rankings
- + Emotive purpose and motivation
- + Personality evidence and proof points
- + Authentic narratives



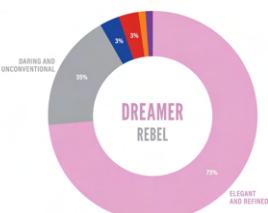
## Who are you today?

We start by asking your internal stakeholders (through a number of frameworks) to individually and collectively evaluate your current personality through an archetypal lens. Before we think about the future, we need to understand who you are today.



## Who should you be tomorrow?

From there, we search for a grounded-in-reality sense of who the institution should aspire to be moving forward. Our comprehensive tool has internal validity to ensure that we arrive at an authentic outcome that can be embraced by the community.



## Who should you never be?

Part of authenticity is knowing who you are not. Our brand strategy is informed by who the institution should never be to avoid drifting into spaces that lack distinction and clarity for those with whom we seek connection.

Custom Option A | Phase I: Research

# External Perception Research

How do you know definitively what your institution's reputation is?  
How familiar is the market with your institution—especially compared to your top competitors?

Carnegie will conduct focused quantitative consumer research utilizing high-impact and targeted opt-in methodologies to determine what the unbiased general market believes about your institution. The study is segmented by region using Nielsen DMAs and allows you to understand levels of awareness, reputation scoring, and personality-driven perceptions of your institution by specific market area. This research provides an in-depth look into perceptions of prospective students, parents, educational influencers, and the general public to inform a wide range of enrollment and communication strategies and set a benchmark to judge future progress.

## You'll be equipped with:

- + Strengths and weaknesses by market and demographic accompanied by recommended strategies
- + Quantifiable data to identify your institution's market position compared to competitors
- + Familiarity and reputation benchmarks to compare future marketing and enrollment strategies against

## QUESTION 1

HOW FAMILIAR ARE YOU WITH THE FOLLOWING UNIVERSITIES?

| OVERALL RANK                           | NONE | NAME ONLY | LOW | MEDIUM | HIGH | SCORE | TIER* |
|--|------|-----------|-----|--------|------|-------|-------|
| #1 University of Notre Dame            | 4%   | 13%       | 25% | 26%    | 32%  | 168   | 1st   |
| #2 Colgate University                  | 14%  | 23%       | 27% | 19%    | 18%  | 106   | 2nd   |
| #3 Villanova University                | 22%  | 29%       | 21% | 16%    | 11%  | 64    | 3rd   |
| #4 Baylor University                   | 18%  | 32%       | 27% | 15%    | 8%   | 61    | 3rd   |
| #5 Carnegie University                 | 35%  | 25%       | 17% | 14%    | 10%  | 38    | 4th   |
| #6 University of Arkansas              | 37%  | 31%       | 19% | 8%     | 5%   | 12    | 5th   |
| #7 Tulane University                   | 36%  | 33%       | 18% | 9%     | 3%   | 12    | 5th   |
| #8 Illinois State University           | 48%  | 31%       | 11% | 7%     | 3%   | -13   | 6th   |
| #9 University of Tennessee (Knoxville) | 52%  |           |     |        |      |       |       |
| #10 Elon University                    | 60%  |           |     |        |      |       |       |
| #11 Queens University of Charlotte     | 66%  |           |     |        |      |       |       |

\*Indicates institutions within the same tier scored statistically similarly on familiarity

## QUESTION 2 (CONTINUED)

WHAT IS THE OVERALL REPUTATION OF THESE UNIVERSITIES?

| CHARLOTTE, NC                      | POOR | BELOW AVG | AVG | ABOVE AVG | EXCEPTIONAL | SCORE | TIER |
|------------------------------------|------|-----------|-----|-----------|-------------|-------|------|
| #1 Tulane University               | 0%   | 1%        | 28% | 36%       | 34%         | 517   | 1st  |
| #4 Carnegie University             | 3%   | 3%        | 29% | 39%       | 26%         | 404   | 3rd  |
| #10 Queens University of Charlotte | 2%   | 16%       | 49% | 23%       | 9%          | 105   | 6th  |
| CHICAGO, IL                        | POOR | BELOW AVG | AVG | ABOVE AVG | EXCEPTIONAL | SCORE | TIER |
| #1 University of Notre Dame        | 3%   | 1%        | 19% | 42%       | 35%         | 534   | 1st  |
| #5 Carnegie University             | 3%   | 9%        | 35% | 37%       | 17%         | 282   | 3rd  |
| #10 Queens University of Charlotte | 12%  | 19%       | 58% | 8%        | 4%          | -135  | 5th  |
| KANSAS CITY, MO                    | POOR | BELOW AVG | AVG | ABOVE AVG | EXCEPTIONAL | SCORE | TIER |
| #1 Tulane University               | 1%   | 9%        | 30% | 40%       | 19%         | 340   | 1st  |
| #5 Carnegie University             | 6%   | 4%        | 45% | 37%       | 8%          | 190   | 3rd  |
| #10 Queens University of Charlotte | 7%   | 18%       | 50% | 16%       | 9%          | 11    | 6th  |

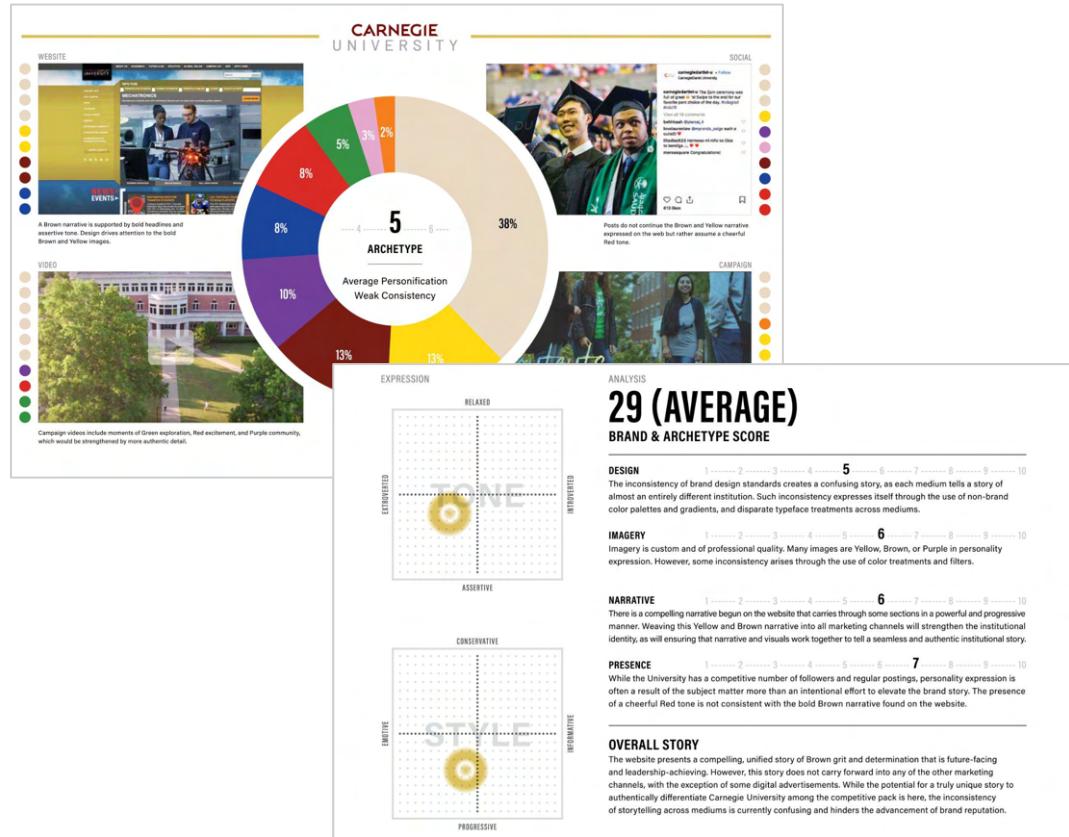
Custom Option A | Phase I: Research

# Competitive Brand Analysis

Gain powerful insights into your direct competitors and discover prime positioning opportunities that help you stand apart. Through our wholly original approach to competitor analysis in higher education marketing, we place ourselves in the position of a student, evaluating your institution against your competitor schools' primary campaigns and marketing messages to reveal who is saying what—and who is doing it best. From websites and social media presence to print and video campaigns, we analyze the communication channels most responsible for shaping prospective student perception and engagement.

## You will gain:

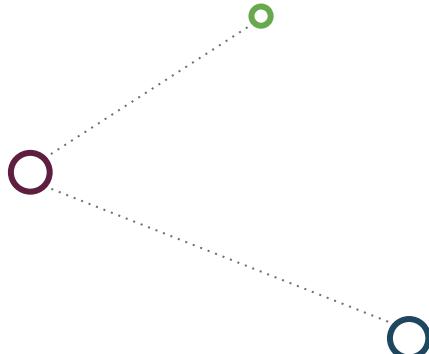
- + Insights into personality, tone, and style of each competitor
- + Understanding of channel-specific trends
- + Strategy recommendations to differentiate your brand storytelling
- + Robust rubric analysis of design, imagery, narrative, and engagement to evaluate the overall brand story



# Phase II: Strategize

## *Brand story development*

Having established your unique market position at the intersection of internal stakeholder research, external perception, and competitive analysis, it is time to build your brand story. We will provide a brand messaging platform that will serve as the foundational document to align your stakeholders behind the new brand strategy.



### **Deliverables include:**

- + Brand personality message platform**
- + Brand strategy and positioning**
- + Brand voice and story**
- + Brand promise and pillars**
- + Brand pillars and traits**
- + Brand anthem**
- + Brand creative core**

Custom Option A | Phase II: Strategize

# Brand Strategy + Platform Development

Armed with reams of rich data and insights from workshops, surveys, interviews, and the competitive analysis, our team develops a compelling overall brand strategy for an exponential and multi-generational effect. At the heart of this deliverable is your brand personality and platform strategy, which fuse together to create an unmatched storytelling tool. This foundational document will serve as the basis for marketing campaigns, staff communications, and beyond, creating sustained brand and reputation performance.

## You will gain:

- + Messaging for each brand pillar that can be used immediately across channels
- + A roadmap for consistent brand expression
- + Understanding of how to implement the brand personality



MAROON  
DEDICATED CONTENDER



YELLOW  
INTELLIGENT TRANSFORMER



PURPLE  
CARING NEIGHBOR

## Brand Anthem Example

At Carnegie University, we are determined to thrive in the competitive world of higher education, offering our exceptional students highly accessible, award-winning programs to equip them for lifelong success. Our resolve to pursue excellence in all things is matched only by our tireless commitment to invest in our students. CU's faculty and staff are dedicated to doing more than what is expected, pouring time and energy into each student to propel them toward graduation and beyond. When the going gets tough, and changes abound, we continue to add value, navigating an ever-shifting global landscape in pursuit of an even stronger future.

At CU, we endeavor to transform our students by providing a cutting-edge environment, future-focused programs, and an intelligent approach to education that will inspire meaningful change. We are never afraid to do the unexpected or unconventional in search of a better solution. We are visionary in our collaboration, recognizing the incredible potential of new perspectives. Tirelessly focused on what's coming next, we inspire our students to challenge the status quo as they pursue their passions, equipping them to leverage their talents to transform the world.

We are an inclusive living and learning community where all are welcomed, and differences are celebrated—because we have learned that there is strength in unity and unity in diversity. Here, you will find a level of personalized care that binds us together deeply and sincerely. When we learn and grow side-by-side, we can all achieve more because a strong support system breeds confidence, and confidence breeds success. We truly believe that by taking care of each student, we empower them all to reach their highest potential. This commitment to nurturing excellence and individuality extends beyond campus to our community and our world, opening doors and creating lifelong opportunities to thrive.

This is Carnegie University.

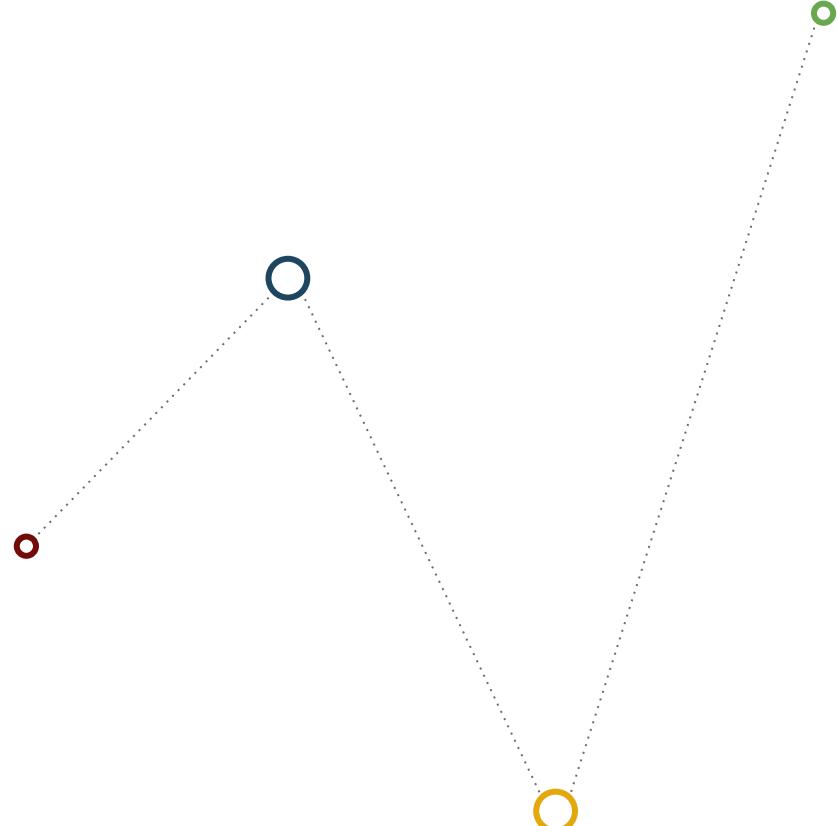
# Phase III: Activate

*Turning strategy into action*

Once we've done the consensus-building work of discovering your unique DNA, we'll help you bridge the gap between brand definition and internal operationalization. From training communicators to equipping leadership with on-brand messaging to developing brand governance, we will empower your stakeholders to live your brand effectively. This consistency is the key to building a strong reputation.

**Deliverables include:**

- + **Internal brand launch**
- + **Training**
- + **Visual identity audit**



# Visual Identity Audit

We realize that while you don't want to redevelop your visual identity system from the ground up, you want to evaluate and potentially evolve it. Based on what we learn from our research and our review of your existing system, we'll help you chart the best path forward.

## In this part of our work, we'll:

- + **Identify relevant data points from our research** that should inform our perceptions of the existing visual identity system.
- + **Take a deep dive into the institution's current identity.** We'll review all of the guidelines related to logos, font libraries, color palettes, tone and style guidelines, and acceptance use examples. We'll also review how the identity system is applied across a suite of materials, including collateral, web, social, digital, and environmental communications.
- + **We'll create a formal, written report that documents our observations and analyses, as well as recommendations** for any ways in which we feel an evolution or adaptation of the existing system would serve the rollout of the University of Portland's brand.
- + **For any creative production work we recommend,** we'll provide formal pricing and scope of work for your consideration.

Custom Option A | Phase III: Activate

# Internal Brand Launch and Training

Message training workshops empower your marketing and enrollment professionals—and stakeholders across campus—to tell your institution's brand story consistently and effectively. Carnegie experts will provide guidance on implementing your new brand personality with exercises like writing personality-rooted messages, selecting images based on personality, and personified storytelling for social media.

## You will gain:

- + Ability to re-engage stakeholders and kickoff the implementation phase with a formal presentation of the research results and brand strategy
- + Practical experience in writing on personality for channels most important for implementation
- + Assistance in training your staff to implement the brand work effectively
- + Exercises that can be used again to train additional and new staff



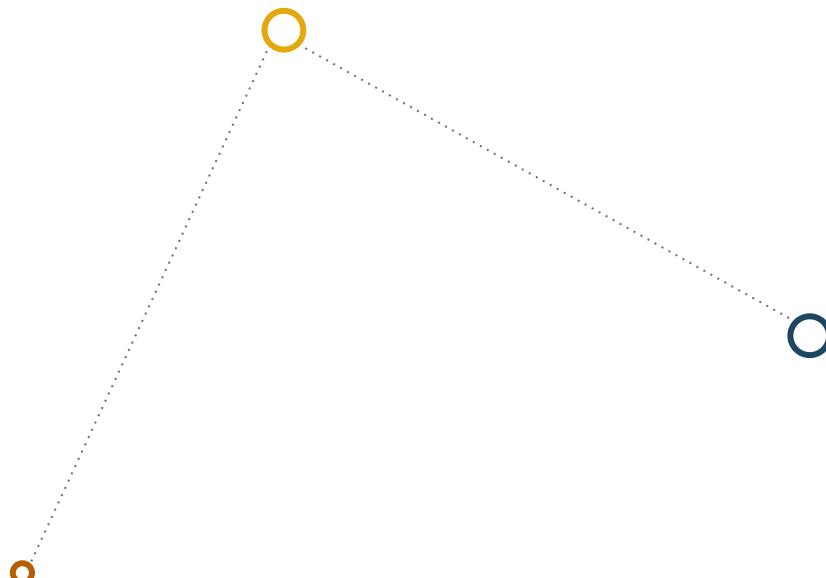
# Phase IV: Express

*Launching your brand in the market*

It's time to launch your new brand! We will transform it into inspiring arrangements of aesthetic, substance, and drive—effectively humanizing your organization through creative visual expression. Demonstrating a clear, consistent personality will drive market awareness and perception and differentiate you from the competition.

**Deliverables include:**

- + **Creative concepts**
- + **Messaging playbook**



Custom Option A | Phase IV: Express

# Creative Concept Development

Guided by research and driven by strategy, we'll develop a foundational creative brand concept to bring your brand to life visually. This brand concept will provide you with an enterprise-level creative campaign that speaks to your institution's multiple audiences in a bold and timeless way.

## You will gain:

- + A custom story arc, design and messaging rationale to visually express your brand story
- + Sample canvases demonstrating how the concept may be expressed across audiences and channels
- + The foundation for a university-wide campaign to launch your brand into the market in an emotive and effective way that generates engagement

\* These are not finalized deliverables; but visual demonstrations that convey the various ways the concept can extend. The concepts will be delivered via virtual presentation, with the goal of selecting and refining a single direction to activate and extend across campaigns.

**Note: Potential cost savings may be achieved when including this product. Original web pricing included two web concepts. If an overall brand campaign concept is chosen here, our web team can translate that into web design without the cost of developing a second web concept.**



Augustana College

Our "Boldly, Brightly" creative campaign for Augustana contributed to 33% growth in student enrollment since 2020.

# Messaging Playbook

Our messaging playbook serves as a companion piece to the creative concept. This document addresses the University of Portland's need for recommendations on brand storytelling and content strategy to connect with your multiple audiences.

**This highly tactical messaging framework demonstrates the successful application of your brand personality to your communications. The goal of this tool is to empower your stakeholders to deliver powerful and effective branded messaging.**

The playbook includes an overview of your personality, storylines, cause statement, and tone, and style guidelines.

To develop this playbook, we'll hold one discovery session for each audience (for example, prospective undergraduates, prospective graduates, alumni). For each of those specific audiences, we'll provide a unique positioning statement with accompanying proof points, as well as a sample of audience-specific content that reflects University of Portland's brand. We anticipate up to two rounds of revision.

# Custom Solution B: Defining Your Brand

We also created a lower-cost option that involves Carnegie handling the brand research and strategy with brand implementation and expression being handled internally by the UP team.

# Customized Solution: Option B

Option B offers all of the rich benefits of utilizing our unrivaled consensus-building brand methodology, including internal stakeholder research, external perception research, and competitive analysis along with a brand strategy and a brand messaging platform. However, it does not include several products to help with brand activation and expression. While this option is more cost effective and takes less time for what Carnegie, it does involve considerable time and resources from the UP staff.

## How Carnegie Can Help:

Our proposed solution includes the following strategies and projected outcomes:

### Brand Development

#### Initiate qualitative and quantitative research with internal stakeholders

- + Align internal brand aspirations for who the institution desires to be
- + Ensure the final brand approach has maximum authenticity

#### Conduct an online market perception study with external audiences

- + Understand institutional strengths and weaknesses by market and demographic

#### Analyze the brand expression of your institution against competitors

- + Identify gaps and opportunities in brand positioning to own a unique market position
- + Prioritize strategies and tactics that will move the needle the most

#### Create a robust brand messaging platform

- + Establish brand messaging that aligns internal stakeholders and engages audiences

#### *Option B does not include:*

- + Visual identity audit
- + Brand standards
- + Campaign concepts
- + Message playbook

# Phase I: Research

## *Personality Science*

The foundation of our brand strategy work is a three-pronged research methodology.

**Deliverables include:**

### + Internal Stakeholder Research

Understand who internal stakeholders say you are.

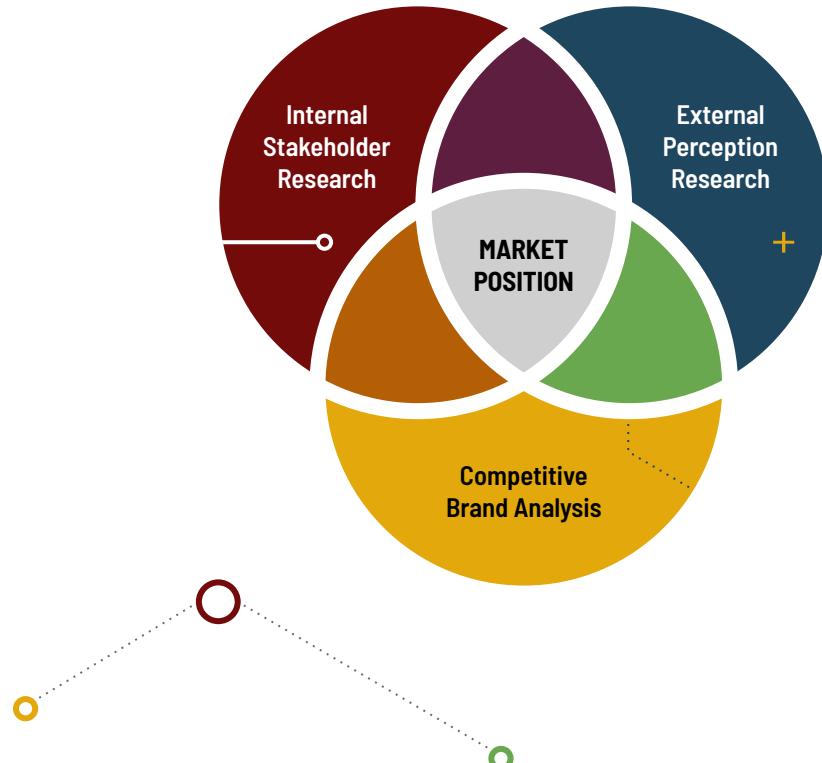
### + External Perception Research

Learn who the external market perceives you to be.

### + Competitive Brand Analysis

Discover how you can tell your authentic story in a competitive landscape and stand out for all the right reasons.

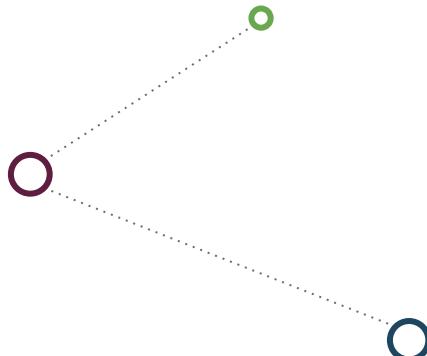
**This unique combination of data points creates your optimal market position.**



# Phase II: Strategize

## *Brand story development*

Having established your unique market position at the intersection of internal stakeholder research, external perception, and competitive analysis, it is time to build your brand story. We will provide a brand messaging platform that will serve as the foundational document to align your stakeholders behind the new brand strategy.



### **Deliverables include:**

- + Brand personality message platform**
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- + Brand pillars and traits**
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- + Brand creative core**

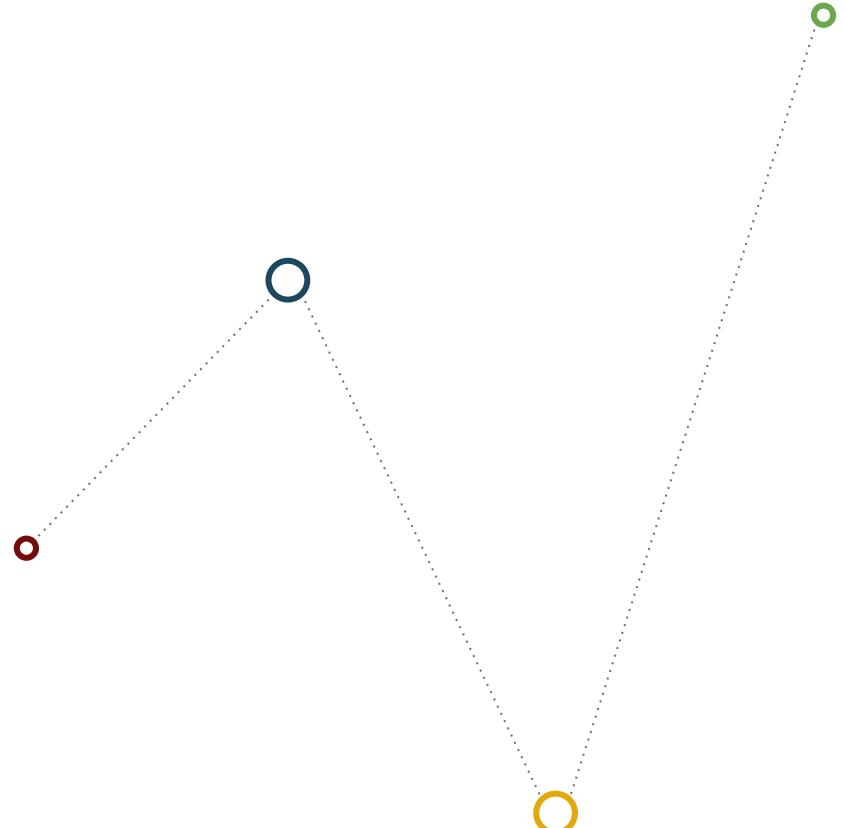
# Phase III: Activate

*Turning strategy into action*

Once we've done the consensus-building work of discovering your unique DNA, we'll help you bridge the gap between brand definition and internal operationalization. From training communicators to equipping leadership with on-brand messaging to developing brand governance, we will empower your stakeholders to live your brand effectively. This consistency is the key to building a strong reputation.

**Deliverables include:**

- + **Internal brand launch**
- + **Training**



# Project Management & Potential Timelines

With a dedicated account manager, a team of subject matter experts, and technology to keep us all on task, our processes maximize collaboration while streamlining efficiencies for staff.

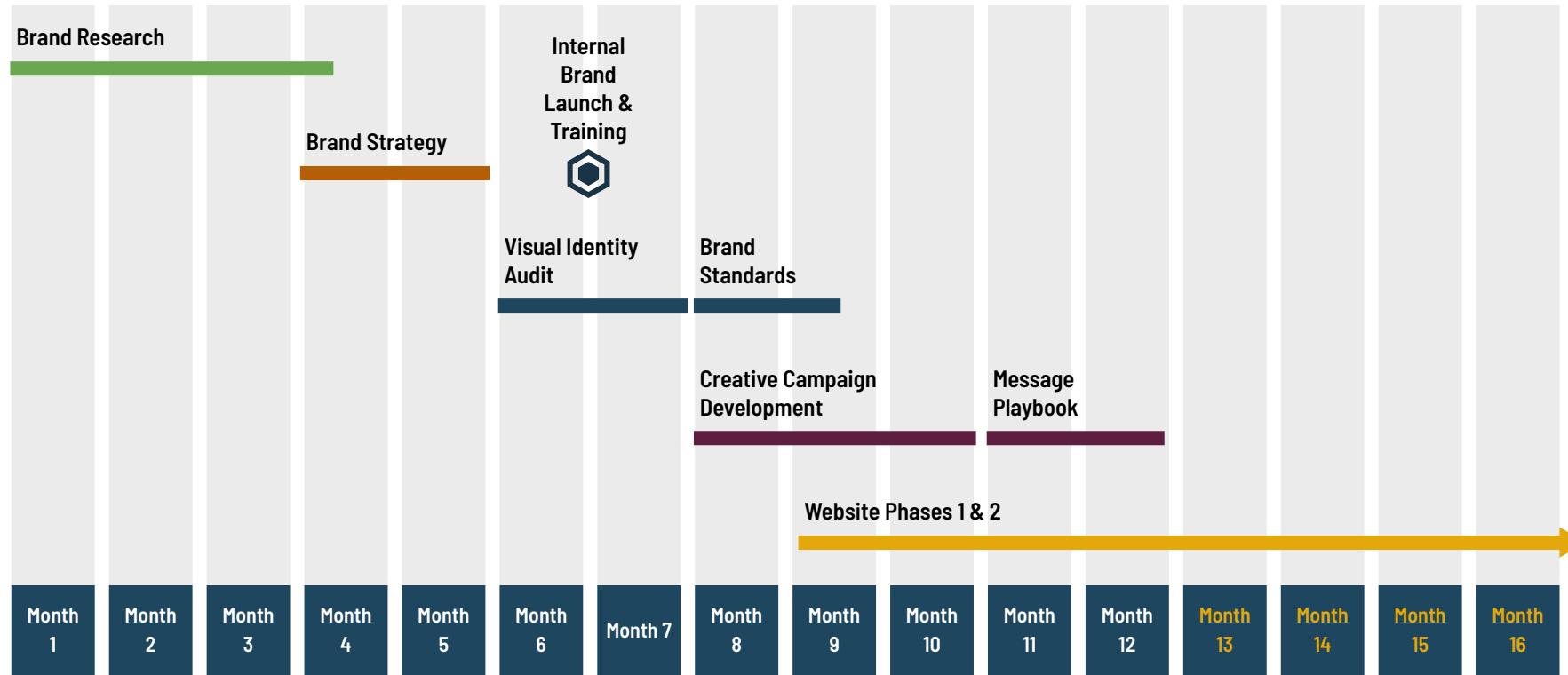
# Project Collaboration and Partnership

- + Core team of Strategists, Client Success Leader, and Account Manager
- + Our full team of experts directly accessible to you throughout
- + Regular status meetings and sharing of work product
- + Excellent project management and collaboration via Asana



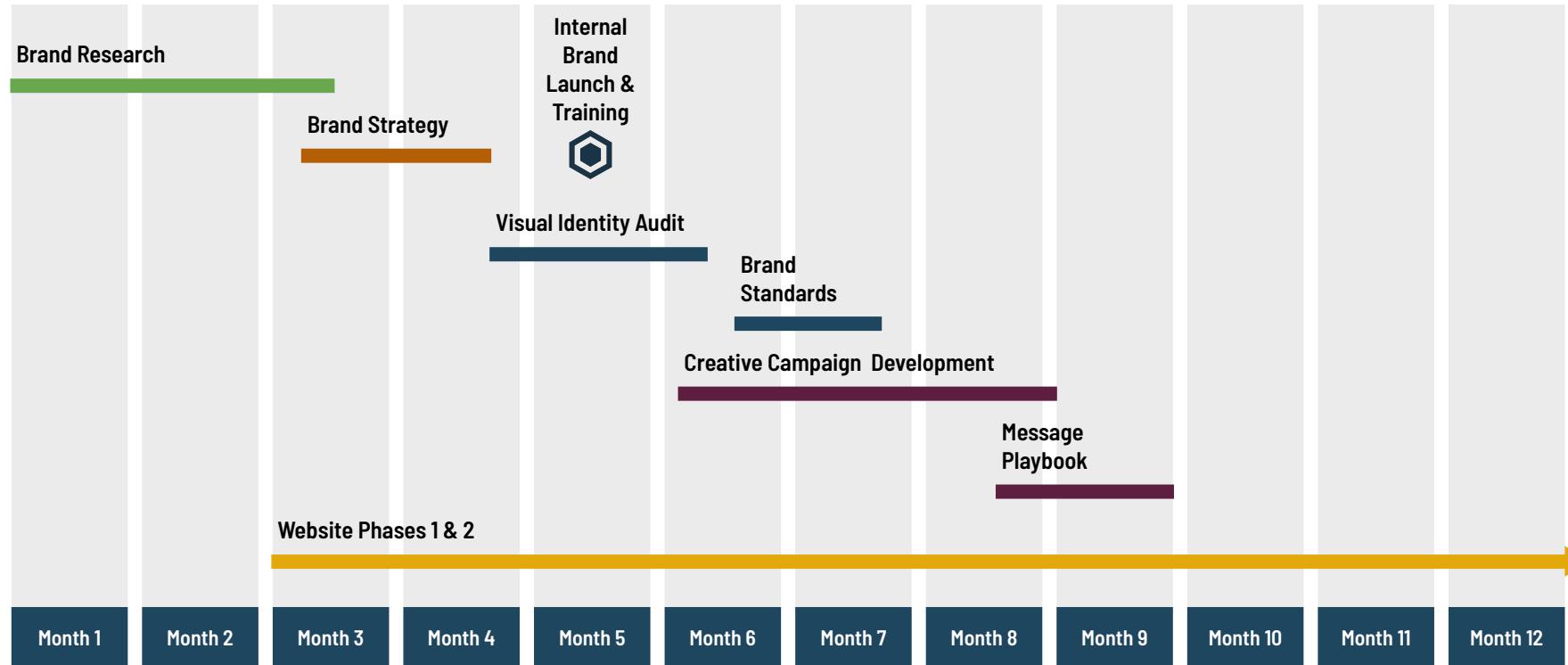
# Custom Option A: Ideal Timeline

Custom Option A is shown below in a sequential timeline. Pros: This timeline involves a thoughtful sequence of projects so as not to overwhelm the UP team. It also involves the least amount of revisions, creating some cost savings. Cons: It does take additional time as web design will be contingent on the chosen campaign concept.



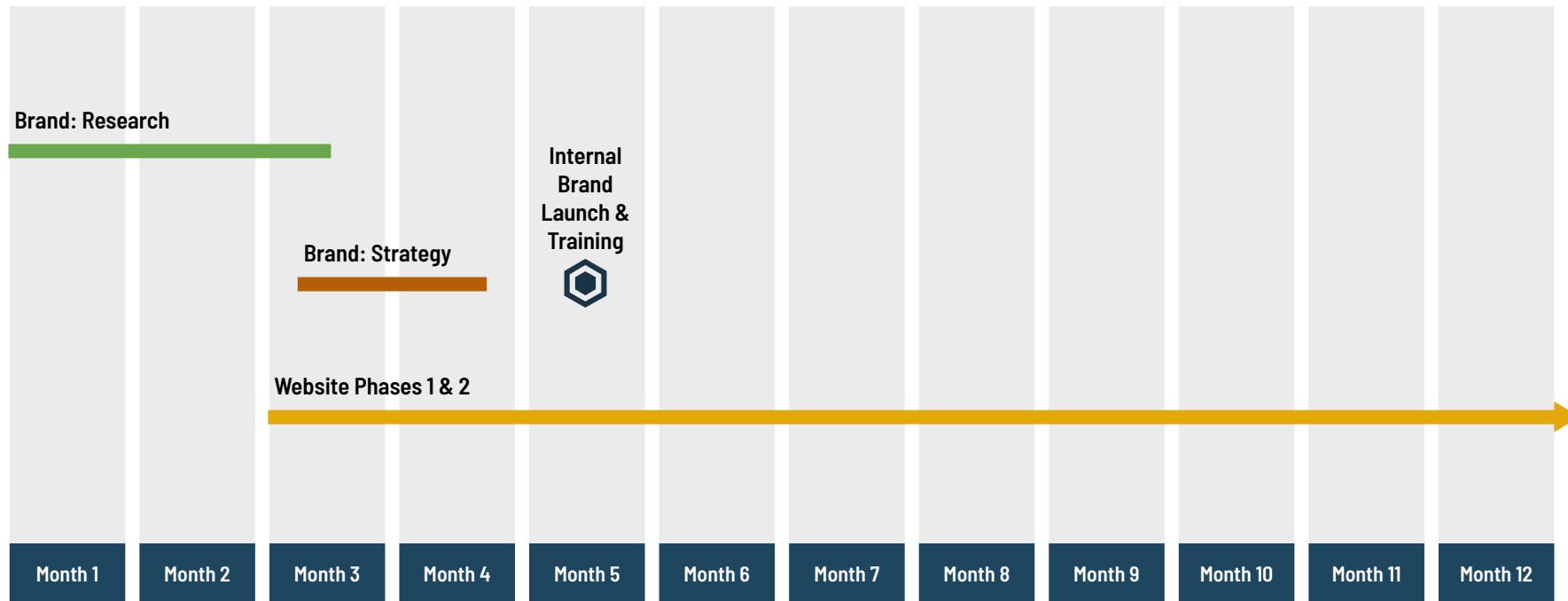
# Custom Option A: Compressed Timeline

Custom Option A could also occur via a compressed timeline as seen below. Pros: All of the robust deliverables from Custom Option A but it would be completed months earlier. Cons: Additional costs would be incurred to revise the web after the brand strategy and campaign concept have been finalized.



# Custom Option B: Timeline

Custom Option B is shown in the timeline below. Due to the limited scope, multiple timelines are not needed. Pros: Because Carnegie will not be performing a visual audit or creating any messaging or campaign concepts, web design would be based on brand strategy alone and both projects would be completed in the shortest period of time. Cons: This means the creative work shown on the other timelines would need to be performed internally by the UP staff outside of the scope of this project.



# Proposed Budget

We have an integrated set of solutions for you that will specifically address each of your outlined goals and objectives.

# Custom Solution A: Proposed Budget

| Service  | Scope of Work Summary   |
|--|---|
| <b>Discovery &amp; Executive Interviews</b>      | At the onset of the project the Carnegie team, led by its strategists, will review recent research provided by the client as well as lead a series of virtual executive interviews revealing valuable insights, history, and context. This positions the project team with a foundational understanding of recent research outcomes as well as any related dynamics as the team engages in our work together. 5 executive interviews (30-45 mins in length)   |
| <b>Internal Brand Consensus Research</b>         | Anchoring your reputation research are live, interactive workshops involving students, faculty, staff, administration, alumni, and the community. The workshops uncover the brand personality of the institution—its traits, faults, archetypes, and cause—and the language that most deeply resonates with its core sense of Self, as described by internal stakeholders.<br><i>6 workshops *Add additional workshops at \$7,400 per two workshops</i>   |
| <b>External Perception Research</b>              | Quantitative survey of external audiences: prospective students, parents, academic influencers such as guidance counselors and teachers, as well as the general public. Survey to include evaluation and ranking of familiarity, reputation, and personality expression. <i>14 questions; 3 Designated Market Area (DMA) or region; up to 900 completed surveys</i>   |
| <b>Competitive Brand Analysis</b>                | Investigation of your competitive set, examining positioning and storytelling tactics, language themes, tone, style, visual identity, technical considerations, realities, and quality rankings. Insights will reveal opportunities to differentiate from the competition. <i>6 competitor profiles</i>   |
| <b>Brand Positioning &amp; Story Development</b> | A data- and strategy-driven Brand Personality will be developed based upon insights from discovery, reputation research, and stakeholder intel. This Brand Personality provides an actionable reputation strategy that enables an organization to communicate its story in ways that position the institution above the competition and elevate its reputation over time. Rooted in the established Brand Personality, a high-level emotive storytelling narrative will be developed to provide direction for the institution to communicate with its audiences. This provides a foundational road map for consistent brand expression. |
| <b>Internal Brand Training</b>                   | To inspire, instruct, and empower institutional stakeholders, on-campus presentations of the Brand Research and Positioning Strategy and Story Development, followed by Message Trainings to train all faculty, staff, and administrators on how to execute the Brand Personality and Storylines in their specific area.  |

*Brand Subtotal: \$ 162,980 + approved travel expenses  
Custom Option A investment continued on next page*

# Custom Solution A: Proposed Budget (continued)

| Service                                  | Scope of Work Summary  | Cost                                   |
|--|--|--|
| <b>Visual Identity Audit</b>             | We'll conduct an audit of your existing visual identity system and make recommendations for any potential evolutions and enhancements to support the new brand positioning.  | \$12,750                               |
| <b>Brand Creative Concept</b>            | We'll provide an enterprise-level brand creative concept that speaks to the university's multiple audiences in a bold and timeless way. It will include a core theme, storytelling arc, design and photography style, and a suite of seven sample canvases to illustrate brand expression.   | \$70,000                               |
| <b>Messaging Playbook</b>                | A companion to our campaign concept work, this highly tactical messaging framework demonstrates successful application of your brand personality to communications with your priority audiences. For each of your specific audiences, we'll provide a key positioning statement and content samples. Our scope of work includes up to three audiences, three discovery sessions in total, and a 12-page final document. We've also built in up to two rounds of revision before final approval of the messaging guide.   | \$14,500                               |
| <b>Brand Standards</b>                   | One brand standards document laying out and defining essential brand rules and guidelines for the existing logo. We work with you to organize and clarify visual/verbal standards as well as explore and redefine specific applications and lock ups. Our guide will include up to 28 pages, inclusive of re-exploration of up to two of the following categories: typography, primary/secondary/tertiary color palette, unit lock-ups, iconography, tone and style guidelines, photography guidelines. Our scope of work includes two rounds of revision. We can expand the guide to include additional categories in four-page increments for each category. | \$35,000                               |
| <b>Custom Option A Total Investment:</b> |  | \$295,230<br>+approved travel expenses |

Continued on next page

# Custom Solution B: Proposed Budget

| Service  | Scope of Work Summary   |
|--|---|
| <b>Discovery &amp; Executive Interviews</b>      | At the onset of the project the Carnegie team, led by its strategists, will review recent research provided by the client as well as lead a series of virtual executive interviews revealing valuable insights, history, and context. This positions the project team with a foundational understanding of recent research outcomes as well as any related dynamics as the team engages in our work together. 5 executive interviews (30-45 mins in length)   |
| <b>Internal Brand Consensus Research</b>         | Anchoring your reputation research are live, interactive workshops involving students, faculty, staff, administration, alumni, and the community. The workshops uncover the brand personality of the institution—its traits, faults, archetypes, and cause—and the language that most deeply resonates with its core sense of Self, as described by internal stakeholders.<br><i>6 workshops *Add additional workshops at \$7,400 per two workshops</i>   |
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| <b>Internal Brand Training</b>                   | To inspire, instruct, and empower institutional stakeholders, on-campus presentations of the Brand Research and Positioning Strategy and Story Development, followed by Message Trainings to train all faculty, staff, and administrators on how to execute the Brand Personality and Storylines in their specific area.  |
|  | <b>Custom Option B Investment: \$ 162,980 + approved travel expenses</b>  |

# Your Brand Leadership Team

We've assembled a team from multiple disciplines to work with you to ensure a seamless experience throughout each phase of work. From the Client Success Director providing strategic direction to the Account Manager keeping day-to-day tasks on track, and all the subject matter experts in between – one team, your team.

## Meet Your Leadership Team



**Melissa Vangsness**  
SVP, Strategy

**Persona**  
The Independent and Resilient Contender



With over a decade in the industry, Melissa Vangsness has an exceptional passion for elevating brands and has gained recognition for her ability to move organizations forward. Known for her relentless work ethic, she is a fearless champion of everything she does. After relinquishing her post as Director of Communications and Marketing at the University of Minnesota, Morris, Melissa is now using her expertise at Carnegie to guide clients through research, strategy, creative, and strategic marketing. She holds a bachelor's degree from North Dakota State University and a master's in Strategic Communication from Concordia University, St. Paul.



**Voltaire Santos Miran**  
EVP, Creative

**Persona**  
The Passionate and Charming Aficionado



Voltaire joined the Carnegie team in 2021 when the company acquired mStoner, a web development and technology agency for higher education that he led as CEO and Head of Client Experience for more than 20 years. He spent the first decade of his career in development and alumni relations, working on print publications, alumni magazines, capital campaigns, and website launches. His expertise in information architecture, content strategy, and governance moves institutions from a project mindset to a process mindset, with powerful results.



**Ian Strawn**  
Senior VP, Creative

**Persona**  
The Wise and Compassionate Impresario



A former worldwide exhibiting fine artist, Ian Strawn now plies his creative talents in the oversight of Carnegie's multimedia designers, producers, directors, artists, and technicians. A graduate of Brigham Young University, Ian is now a 15-year veteran of the creative marketplace. He has served in the capacity of designer, strategist, marketing director, art director, creative director, and start-up entrepreneur. Ian applies a unique mix of both creative thinking and analytical strategy, pushing each project to the most on-brand outcome.



**Jared Brickman**  
SVP, Research

**Persona**  
The Creative and Analytical Theorist



Jared Brickman considers himself a true data nerd. With a decade of research experience in communication technologies and campaign studies, Jared is practical, focused, and driven by the compelling stories found underneath the numbers. He has won local, national, and international awards for his overall research on mobile health, viral web content, and online social support. He is also an active member of the research review community and is an upcoming member of the editorial board for the peer-reviewed journal *New Media and Society*.

# Partner Success Stories: Brand

We've selected case studies that highlight work similar in scope to the solution we are proposing.



CARNEGIE



# The Grainger College of Engineering

UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN



## + Brand Personality

Our partnership began with multiple workshops among Grainger stakeholders, including a competitive analysis, and market perceptions. The research culminated with an authentic and engaging creative concept that was fulfilled in multimedia, digital, and print to distinctly position their brand personality across channels.

# WE SOLVE PROBLEMS *first*



BECUSE MARS WON'T EXPLORE ITSELF

From the oceans of Earth to the skies of Mars, Grainger engineers find solutions that improve lives, protect our planet, and fuel the human need to explore.

We tackle every problem by asking, "what's the human impact?" Sometimes we become astronauts or engineer vehicles that drive and fly on Mars. Sometimes we build solar cars, craft solutions to save our coral reefs, and make breakthrough discoveries in cancer research.

We solve problems because the right solutions save lives, build societies, and preserve our planet's health.

The Grainger College  
of Engineering  
UNIVERSITY OF ILLINOIS SPRINGFIELD

I

**limitless**  
THE GRAINGER COLLEGE OF ENGINEERING  
SPRING 2023

**PREPARE TO FLY THE (ENVIRONMENTALLY) FRIENDLY SKIES**  
Solving for Sustainability with Phillip Ansel

UNIVERSITY OF ILLINOIS SPRINGFIELD

**DRIVEN TO MAKE IT *work***

WE SOLVE PROBLEMS FIRST

At the Grainger College of Engineering, we solve different kinds of problems to make the world a better place. We're not just interested in what's next; we're interested in what's now. And we're not afraid to take risks. We're driven to make it work.

A Grainger Engineering, we ask the question: can it? And if it can't, we figure out how to make it do so. We're not afraid to take risks. We're driven to make it work.

These are just some of the top-ranked engineering programs in the country. And more companies like Ford, Toyota, and Boeing are turning to us for help. It's a great place to work, and we're here to stay. It's a great place to learn, and we're here to stay. It's a great place to live, and we're here to stay.

**SOLVE**  
*problems.*

CARNEGIE

## + The Results: We Have Lift-off

Driven by Carnegie's Archetypal model and brand strategy, Grainger now has the tools needed for authentic brand expression and reputation building across channels-social, digital, among audiences, stakeholders, and more. The college continues to build rankings and enhance its reputation among peers and is armed with a brand strategy that is authentic and advantageous for telling its story.



The brand anthem video we produced for Grainger won a 2023 Platinum Viddy and two 2023 Gold Telly Awards. Watch it now at:  
<https://vimeo.com/742779934/c2609aa2eb>.

## WE SOLVE PROBLEMS *together*



RISHI MOHAN, INDUSTRIAL ENGINEER

Current team director of operations, Rishi Mohan has seen first-hand how collaborative environments like the Siebel Center for Design (SCD) at UI can make solving problems much more efficient. "We bring engineering-focused multidisciplinary design to a space that's perfect for just that, and SCD provides unparalleled access to collaborative spaces and resources that help an engineering team like

- + Carnegie also created engaging landing pages that incorporate Grainger's brand personality by showcasing narratives that place their most valuable assets; its students and their accomplishments, at the forefront.

*"Having a strong partnership yields great creative outcomes, which is something we have found with Carnegie. Being a large college, we needed a robust team who could move on multiple different fronts simultaneously."*

**Libby Kachich**  
Assistant Dean for Marketing & Communications

A large, stylized bulldog logo in shades of blue and grey, standing on its hind legs and looking towards the right. It has a muscular build and a determined expression.

CARNEGIE

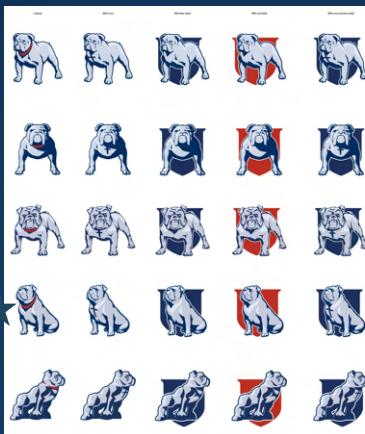




## The Challenge

**Samford University, a Christian liberal arts higher education institution in Alabama, sought to conduct research and collect data on which to build a brand strategy.**

Additionally, there was an expressed need to create alignment between the University's athletic and academic visual identities. Samford long felt its athletics logo didn't feel "right," but they weren't sure why. At a broader level, Samford sought fresh data to support a new reputation strategy that would align departments and project a consistent message to the market.

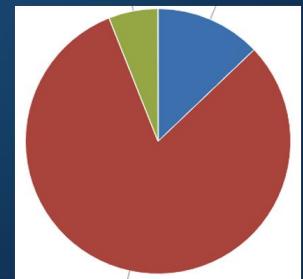
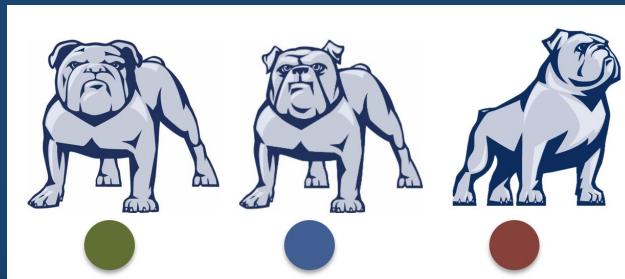


## + Intel at Qual

Campus community participation was a key process goal and provided valuable insights. We tested directional sketches very early in the process. Students astutely observed that a leader should neither wear a collar nor sit. If their brand were to represent a leader, they would stand at the ready and be led by no one else.

## + Clear Path at Quant

After some refinement, we brought mid-process illustrations to market quantitative testing to verify that the design would convey leadership and athleticism. The results were unmistakable.





## Color Formats

Our brandmarks may be expressed in a limited number of color variations for long-term consistency. These options are provided here.

As demonstrated, our brandmarks may exist on three background colors—all of which are official colors in our palette. Note that these color formats apply to both the full signature and the Sam-dot mark when it is used separately. Do not attempt to colorize any elements within our brandmarks in contrast to the standards represented here.

When printing communication products, always request a proof and compare the result against Pantone® color matching system.  
When using digital files, be aware that color modes, profiles, hardware, and file types will influence color accuracy.



# CARNEGIE

## Brand Identity

## + Control with Standards

An identity without governance is chaos. As soon as the mark was finalized, we developed brand standards to give structure to launch the new bulldog mark.

CARNEGIE



## + We Have Lift-off

The entire campus embraced Samford's new bulldog with great enthusiasm and pride. It's become a symbol of the noble leader that lies at the heart of Samford's brand personality.

CONCEPT 1



CONCEPT 2



CONCEPT 3



CONCEPT 4



CARNEGIE

## + Logo Refinement

Samford also asked us to help them evolve their institutional logo. We refined their primary mark by removing extraneous details, simplifying lines, and emphasizing the interplay of light on the tower's facade and steeple. We then created a range of concepts that incorporated new typefaces, their shield, and the U letterform to represent University.

# PUSH YOUR LIMITS

**Athletic Growth.  
Personal Growth.**

"Samford pushes you to your limits. When I return to play with my national team in South Africa, I can see how I've grown as a soccer player. In the past I've skated by on my talent. But at Samford we're taught that it's not talent but mentality. It's working harder today than you did yesterday every single day."

"The best part of playing soccer at Samford has been finding my identity in Christ. I know that sounds strange; you'd think it would be winning. But growing as a person has truly been the most important."

—Jermaine Seoposenwe

**Jermaine Seoposenwe**  
**SOCCER**

*Senior*  
Marketing

Competed in the 2016 Olympic Games  
South African National Soccer Team Member  
2016 SoCon Champion

Our collateral, web, and digital work for Samford the noble leadership values that drove the redevelopment of their mascot.

# SAMFORD

**A Tradition of Bulldog Excellence**

**Samford Athletics**

Samford's 17 NCAA Division I teams are a rich part of our community's tradition of training for excellence and gathering to celebrate achievement. Current students, alumni and community members come together to tailgate before big games, cheer on teams with a legacy of 34 championships since 2008 and deepen Samford family camaraderie.

**Bulldog Club**

The Bulldog Club gives members a chance to support Bulldog athletics and be a part of both premium game day hospitality and reserved parking. Information is available at: 205-726-4307 or [bulldogclub@samford.edu](mailto:bulldogclub@samford.edu).

**Samford Fans Reward Club**

Take advantage of the exclusive SAM Fan Rewards App! Check in at events, earn points and get rewarded! Download today for your Apple or Android device.

# ATHLETICS

**Fight Song**

Fight, fight, fight,  
For Samford Bulldogs;  
Go onward to victory;  
Oh, we'll wear the red and blue,  
Samford, we're all for you . . .  
And we love you, too!  
Fight, fight, fight,  
For Samford Bulldogs;  
Go onward to victory;  
Oh, we'll give a cheer or two,  
Samford, we're all for you . . .

**Teams**

**Men's Sports**  
Basketball  
Baseball  
Cross Country  
Football  
Golf  
Tennis  
Track & Field

**Women's Sports**  
Basketball  
Cross Country  
Golf  
Soccer  
Softball  
Tennis  
Track & Field  
Volleyball

# CARNEGIE

# BE THE BEST

**Tray Oates**  
**POLE VAULT**  
*Senior*  
Foods and Nutrition

2016 U.S. Olympic Trials  
2016 USFETC/CIA All-American Pole Vault Team  
NCAA Outdoor Championships 7th Place

"Everyone is there to support you. Going into NCAA championships, I hadn't done my best, but my coach kept pushing me. I had the entire athletic department out there cheering me on when I finally qualified for the championships. No matter what sport you play the entire campus is behind you."

—Tray Oates

**17 Division I sports**  
**5 current NFL players**  
**NCAA Division I national champion**  
**31 conference championships since 2008**  
**98% graduation rate among athletes**

[samford.edu/1841](http://samford.edu/1841)

# References

We've provided a list of clients who have worked with us on similar brand projects.

# References

## Libby Kacich

Assistant Dean for Marketing &  
Communications

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**Scope of Work:**

Our work with Grainger included brand personality, creative campaign development, collateral, web content development, photography, and videography.

## Jason Black

Vice President for Enrollment  
Management

**Samford University**

800 Lakeshore Drive  
Birmingham, AL 35229

205.936.2441

[jjblack@samford.edu](mailto:jjblack@samford.edu)

**Scope of Work:**

Over several years, our work with Samford has spanned our full creative portfolio of services, including brand personality, athletics logo development, institution logo assessment and refinement, creative blitzes, campaign development, collateral, digital content, photography, microsites, and student search campaign emails.

## Jay Gonzalez

President

**Curry College**

1071 Blue Hill Ave.  
Milton, MA 02186

617.333.2229

[jay.gonzalez@curry.edu](mailto:jay.gonzalez@curry.edu)

**Scope of Work:**

Curry College has partnered with Carnegie on a variety of projects from research to brand personality, logo development, campaign development, and multimedia production. Jay Gonzalez, their newest president, recently unveiled the new college logo during his inauguration dinner.

# About Carnegie

# Comprehensive Services

We can meet you wherever you are in your journey. Consider our team an extension of your own — focused on your needs, dedicated to your success.

## BRAND STRATEGY

Carnegie's original psychometric model and brand reputation strategy allow us to do more than just create a brand for your organization.

## DIGITAL MARKETING

We bring advanced strategies to showcase your brand to the world. Above all, we tailor the plans for you: your audience, your institution, your goals.

## ENROLLMENT STRATEGY

Our approach to enrollment marketing success is to uncover and interpret intelligent, market-driven, student-centric data and then leverage its findings to execute customized strategies for your institution.

## FINANCIAL AID OPTIMIZATION

We deliver individualized financial aid strategy—not only customized for your institution, but customized for each student.

## INTEGRATED RESEARCH

Our cutting-edge, proven methodologies give you the game-changing insights needed to transform your enrollment, marketing and branding, and communications outcomes.

## LEAD GENERATION

CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions.

## MARKETING STRATEGY

Colleges and universities must place more attention on reputation management and marketing strategy as evolving, competitive dynamics further impact higher education.

## PERSONALITY ASSESSMENTS

CarnegieChem, our carefully designed suite of personality assessments and tools, reveals human personality and performance factors in an entirely new way.

## SIGNATURE CREATIVE

By defining what sets you apart and by learning what will speak to your audiences, we create impactful messaging that builds reputation and forges powerful connections.

## SLATE OPTIMIZATION

Our Slate Optimization team saw the industry need and met it. We're transforming the higher education landscape by leveraging the power of Slate—one project at a time.

## STUDENT SEARCH

Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.

## WEBSITE DESIGN AND DEVELOPMENT

We design websites for colleges and universities that are alive and persuasive—congruent with campus voices and integrated within your marketing ecosystem.

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# CARNEGIE

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