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Company Information

Quick Facts

CONTACT AND HISTORY

Carnegie Dartlet LLC. Established under Carnegie Communications in 1985, and as Carnegie Dartlet LLC in 2018.

210 Littleton Road, Suite 100, Westford, MA, 01886

P: 978-692-5092

F: 978-692-4174

E: info@CarnegieHigherEd.com

How many office locations do you have?

Carnegie's headquarters and primary office is located at 210 Littleton Road, Suite 100, Westford, MA 01886.

The majority of our 350+ person team lives around the country.

FIRM PRINCIPALS AND ROLES

Joseph F. Moore - Chairman and Partner

Gary Colen - Chief Executive Officer

Meghan Dalesandro - Partner and Chief Operating Officer

Tyler Borders - Partner and Chief Strategy Officer

Scott Ochander - Partner and Chief Marketing Officer

OVERALL PHILOSOPHY

Innovation and passion. Service and success. We want to be the best at what we do, we want to have fun doing it, and we want to provide our clients with the best customer experience possible.

PUBLIC OR PRIVATE

Carnegie is privately held.

FORM OF BUSINESS

Limited Liability Company

NUMBER OF CLIENTS

More than 600

TAX CLASSIFICATION

S Corporation

ANNUAL REVENUE

>\$40 million

STATE OF INCORPORATION

Delaware

HUB SUBCONTRACTOR

Carnegie is not a HUB Contractor, but we are open to working with any HUB Contractors/subcontractors recommended by the school.

FEDERAL TAX ID (FEIN)

85-3168237

Dun & Bradstreet

08-123-6637

State/Institution Codes

California Secretary of State: CARNEGIE DARTLET LLC (202030110068)

State of MN vendor ID: 0001087737

If your company has history pre-dating its current form, please describe that history along with relevant dates.

Since 1985, we've been committed to helping higher education institutions connect with the right audiences and vice versa. In January 2018, Carnegie, LLC was formed as the result of a merger between Carnegie Communications LLC and Dartlet LLC. Today as Carnegie, we provide clients with seamless research-to-implementation marketing solutions that drive change and deliver potent solutions for the various challenges faced by higher education institutions.

Sole Source Language

[See documentation here.eeo](#)

Business Overview

(MASTER)

Carnegie is a full-service agency offering a complete end-to-end portfolio of communications services that generate results for whatever challenges you may face. We apply a custom approach and proprietary methods to all of our research, strategy, creative, digital, lead generation, and team dynamics services. Our mission is to help our clients understand who they are, who their audiences are, and how to create powerful connections between them all.

Everything we do creates and strengthens human connection. From revealing the human core of your organization to crafting powerful strategies and unleashing innovative creative and digital campaigns, we use the breadth of our full portfolio of services to equip your organization to understand itself, define its place in the market, and achieve tangible results. We are a company that listens, collaborates, and leads. This is how we earn your trust as an invaluable strategic partner.

(DIGITAL FOCUS VERSION)

Carnegie is a full-service agency that offers a complete end-to-end portfolio of communications, digital, and lead generation services. Our mission is to help our clients understand who they are, who their audiences are, and how to create powerful connections between them all. Ten years ago, Carnegie became the pioneer of higher education digital marketing, and we've been leading the way ever since. Our in-house team of over 100 expert account managers, digital strategists, social media experts, and analytics specialists will fully manage and execute your campaigns. Through our full life-cycle solutions, we can deliver relevant and conversion-friendly digital marketing plans that are driven by critical insights about who you are and what's right for your marketing and communications strategy. We're confident that our method, philosophy, and dedicated relationship will deliver strategic and tactical solutions you won't find anywhere else.

(RSC FOCUS VERSION)

Carnegie is a full-service agency that offers a complete end-to-end portfolio of communications services that generate results for whatever challenges you may face. We apply a custom approach and proprietary methods to all of our research, strategy, creative, digital, lead generation, and team dynamics services. Our mission is to help our clients understand who they are, who their audiences are, and how to create powerful connections between them all.

We activate the power of psychometrics to deliver original, industry-leading communications solutions that empower clients to move forward with confidence. Beginning with a potent, peer-reviewed research model that builds consensus and empowers authentic storytelling, we define your institution's true sense of self, equipping you with the strategic tools to bring clarity to your messaging, pinpoint your target audience, and distinguish yourself in the market. With client after client, we apply the power of human connection to speak directly to the right students with the right messages. In other words, we cracked the code—and you reap the benefits.

Differentiators

HIGHER EDUCATION EXPERTISE

Carnegie has been in the higher education industry for 30+ years. Many of our team members came from inside higher ed and have a critical understanding of enrollment cycles, organizational dynamics, internal politics, expectations of prospective students, and more.

SOLE SOURCE SERVICES

We offer services other firms can't—data-backed psychometric marketing; a proprietary, peer-reviewed,

consensus-driven research methodology; a theory-based research platform; products such as Carnegie Clarity™, Audience Select, Darts, and TeamChem™; and other opportunities live-in creative blitzes and persona-based digital audience targeting.

SUBJECT MATTER EXPERTS AND IN-HOUSE EXECUTION

The breadth of our portfolio has enabled us to collect a diverse team of in-house subject matter experts across all marketing disciplines. We're constantly polling a

variety of perspectives to ensure we've thought through our strategic recommendations from every angle. Having all this talent under one roof also allows us to prioritize ever-shifting targets, like digital campaign performance, above all else and in real time.

UNIFIED MARKETING & ENROLLMENT STRATEGY

Our full-service model unifies marketing and enrollment, ensuring cohesive and targeted messaging in your brand personality voice to all of your audiences. With higher education clients worldwide, we've not only continually refined our methods over 34 years, but we can see where the market is heading.

PARTNERSHIPS AND CERTIFICATIONS

We've served as a partner for some of the most reputable organizations and associations in higher

education, including NAGAP, NACAC, and LinkedIn. We were also handpicked to join Google's Premier Partnership program, which means we have a dedicated Google-appointed team and access to the latest Google technology, products, and training.

PERSONALITY-FOCUSED, DATA-DRIVEN CREATIVE

Reflecting on the power of human connection, our approach to creative conceiving and execution is a fusion of logic and feeling. We base all content, design, and imagery decisions on research outcomes—mixed-method research that delivers an authentic brand personality. Our Creative team drills down into the distinct nuances of each brand personality and delivers inspired work that compels audiences to take action.

Differentiators: version two

RESEARCH-INFORMED DECISION MAKING

Your market is going to dictate your potential outcomes, and you can't afford to guess when it comes to prioritizing programs or competing for your position within a given market. Our research doesn't just deliver data on program viability. We'll do that, of course, and then we'll go deeper, examining audience needs and preferences, online behavior, and digital advertising trends. We'll create student personas based on demographics and psychographics and develop a specific messaging strategy for each academic program rooted in a brand platform that's designed to boldly and distinctively differentiate you from your competition.

EXCELLENCE IN MARKETING EXECUTION

All of our research translates to smart and strategic marketing execution, and you won't find a more seasoned digital advertising team anywhere in higher education. We rely on our premier partnerships with Google, LinkedIn, Facebook, and other leading platforms to keep our in-house team on the very cutting edge of digital marketing. We will develop a research-based omnichannel approach to reach and influence your many audiences, and ultimately, drive them to conversion.

TOTAL TRANSPARENCY AND FLEXIBILITY

Now more than ever, it's impossible to predict the future. That's why we shape our partnerships with total transparency and flexibility—so you'll be in control like never before. We don't sign long-term contracts, and we don't share in tuition revenue. We deliver detailed reports and make specific recommendations for how we'll improve performance. Ultimately, our success is your success, and by investing in a partnership with Carnegie, our team becomes yours.

Differentiators: digital-specific

TECHNICAL EXPERTISE

Not limited to any single platform or approach, our in-house capabilities include Display Outreach, Retargeting, IP Targeting, Audience Select, Mobile Footprints, Mobile Location Targeting, Geofencing, Look-Alike Display Advertising, Search Engine Optimization (SEO), Pay Per Click (PPC), Carnegie

Clarity™, Over-The-Top and Connected TV, Outbrain, and social and streaming media.

HIGHER EDUCATION EXPERIENCE

With experience serving over 600 higher education clients, we understand the nuances of executing and optimizing digital campaigns—including for complex institutions with multiple degree and program

offerings—like no other firm. As a result, we have a deep understanding of the nuances of reaching and engaging prospective students: which platforms and tactics work best for the time of year and audience, how to align calls to action and messaging with each audience's position in the decision-making funnel, and which strategies drive conversions the best.

YOUR WINS ARE OUR WINS

We believe in building exceptionally committed, long-lasting relationships and earning your trust as we help you tackle any challenge at hand. We're invested in your success every step of the way.

END-TO-END CAPABILITIES

With expertise in digital strategy and execution, market research, reputation strategy, signature creative, lead generation, team dynamics, and traditional media, there isn't another firm that offers the comprehensive solutions you'll have access to through our full portfolio of capabilities.

CUSTOM SOLUTIONS

Our partnerships drive our passion for developing custom solutions based on your specific needs. Our approach will always begin with your goals in mind. We'll build strategies to best align with who you need to reach, how you need to get them to engage, and what

will perform best. We don't template our solutions but leverage our expertise and our ongoing partnership with you to customize our strategies for your institution and each stakeholder challenge you face.

PLATFORM PARTNERSHIPS

We're committed to staying on the cutting edge of an ever-changing landscape. We're held to the highest standards of expertise through our Google Premier Partner status and direct partnerships with leading platforms like LinkedIn, Spotify, and more. LinkedIn has recognized our graduate marketing work as "best in class" and has co-sponsored research projects and co-presented with our team at conferences and workshops. We work hand-in-hand with LinkedIn to ensure we're leveraging and innovating the best strategies for enrollment marketing.

INDUSTRY INSIGHTS

We've served as a partner and marketing provider for some of the most reputable organizations and associations in higher education, including ACHE, NAGAP, NACAC, CTCL, and ACE. Carnegie's reputation for innovative solutions and higher education expertise has resulted in successful and ongoing partnerships that support their missions.

Industry Recognition

From our earliest days, we've been setting the standard for excellence in higher education marketing. It's vital to us to hold ourselves to the highest standards and stay on the cutting edge of a quickly changing industry to ensure we're providing the best possible partnerships and solutions for the schools we serve. Here are a few examples of Carnegie's industry leadership and recognition:

Reports and thought leadership: The higher education world looks to us as experts and thought leaders for a variety of industry topics, as evidenced by our frequent research and reports informed by data from thousands of students in our CollegeXpress database as well as our higher education-focused webinars, whitepapers, conferences around the country throughout the year (including the annual Carnegie Conference), and highly trafficked blog.

Academically peer-reviewed research: Our first-of-its-kind psychometric marketing model and research processes have yielded two peer-reviewed conference publications at the annual conference and international open competition of the Association for Education in Journalism and Mass Communication.

Google Premier Partner: We were handpicked to join Google's Premier Partnership program, which means we have a dedicated Google-appointed team and access to the latest Google technology, products, and training. This designation, awarded to only 3% of its partners, means we're held to Google's highest standards of expertise, certifications, and performance.

NAGAP: The Association for Graduate Enrollment Management has looked to Carnegie as one of its original strategic partners for the past several years. In addition to awarding one of our team members the Innovation Award at its last annual conference, NAGAP works with us for research efforts, thought leadership content, webinars, white papers, and marketing insights in the world of graduate enrollment management.

LinkedIn: This professionally focused social platform has recognized our higher education marketing work as "best in class" and has co-sponsored research projects and co-presented with us at several conferences and workshops on enrollment marketing. We regularly work hand-in-hand with a dedicated team of LinkedIn leaders and experts, including co-writing a white paper about the platform's impact on the prospective student journey.

Spotify: This music streaming platform works closely with our Digital team for industry-specific input and best practices, recently partnering with us for a case study on use of the platform in higher education.

List any awards your agency has received in the past two years.

From our earliest days, Carnegie has set the pace for excellence in higher education marketing. From Premier Partnerships and presentations with industry leaders at Google, LinkedIn, NAGAP, NACAC, and more, Carnegie is recognized continually as a leader and innovator in higher education digital strategies. In addition, our clients have been recognized with Educational Advertising Awards for (logo, billboards, magazine advertising, and digital advertising). Recently, one client partner received a CASE Circle of Excellence Grand Gold award for admission collateral directly informed by brand strategy and positioning developed by Carnegie. In addition, mStoner has been recognized with awards for website design and digital arts, including AVA Digital Awards, UCDA Design Awards, Webby's, W3 Awards, and Davey Awards.

Corporate Culture

Carnegie's culture is one of the most vital components of our business, and in so many ways, it's the heartbeat of the organization. We annually invest in assessing, listening, and shaping our culture in meaningful ways. In fact, we apply our own personality diagnostic product, Team Chem, to our company. This knowledge allows us to understand who our employees are on an individual basis and how best to support each team member. The data speaks for itself: We're a family founded upon strong work ethic and commitment to client experience; we're optimistic and fun, and we focus on interpersonal relationship-building internally and externally—you're going to have a good time with us. We truly care about one another and the communities in which we live and work. We value people over results—this has always been our ownership philosophy. Take good care of great people, and results are a natural by-product. We are proud to be a privately-owned company going on 34 years in the business, and not another large corporate rollup made by acquisitions and PE firms.

Commitment to Environmental Sustainability

Improving our communities and those of our clients is deeply ingrained in the Carnegie spirit of service, passion, and human connection. Through TeamCare, our corporate social responsibility initiative, we support the communities in which we live and work through in-kind and financial donations as well as employee volunteer days. We've also taken steps to make our offices more eco-friendly, including recycling initiatives, telecommuting options, and reduction of paper and electricity waste. We value your school's commitment to sustainable operations and will fully support your strategies in every aspect applicable to our partnership.

Description of Rates and Fees

Client List

Higher education isn't just one area in which we work—it's been our focus for the past three decades. We're proud to serve more than 600 public and private institutions ranging from traditional four-year institutions and graduate schools to community colleges and technical schools.

EO/DEI Statement

Carnegie embraces and affirms diversity of every kind. We are an equal opportunity employer who believes passionately in the power of human connection, knowing that we're strongest when we bring a breadth of perspectives and experiences to our work. We celebrate differences within our team and actively promote inclusion in our workplace. As part of this effort, we identified and continue to partner with a diversity, equity, and inclusion consultant to ensure we continually learn, grow, and improve in these areas as individuals and as an organization. Our commitment to inclusion across race, gender, age, religion, sexuality, and other dimensions of identity drives us forward every day.

Our appreciation for partners who share a passion for furthering Diversity, Equity and Inclusion (DEI) practices and principles is mutual. In working with Carnegie Mellon, we anticipate that a productive collaboration would serve to amplify our anthem for this work:

We believe in the power of differences. We embrace every piece of our humanity and desire to celebrate the backgrounds, perspectives, worldviews, and individual demographic and psychographic identifiers that have shaped and continue to shape who we are. We seek to nurture a culture of inclusion across race, gender, age, religion, sexuality, personality, cognition, physical ability, and other dimensions of identity. Finally, we are committed to actively working towards creating a more just, equitable environment for everyone—no exceptions.

Over the past few years, we have developed a comprehensive approach to supporting a culture that fosters belonging so that all employees can thrive, be supported, and do their best work. This approach includes:

Support Professional Growth and Development and Anti-Racist Training

- Intercultural Development Inventory
- Beyond the First and Only Training
- Cultural competency language training
- Implicit Bias Training
- Women in Leadership Panel
- TeamCare: ERGs, Philanthropy and Sustainability

Support a Culture of Belonging with Personnel Efforts

- Intentional DEI recruitment and support
- Examine traditional recruitment efforts
- Reallocate resources with an intentional commitment to DEI and HBCU employee recruitment
- Recruit DEI Advisor
- Hire Of Counsel
- Community: Create Ethic Review Committee

Reduce Systemic Barriers and Improve internal Processes

- Comprehensive Improvement in Human Resources Recruitment and Support (onboarding through offboarding)
- Create Bias Protocol and Incident Form
- Parent Leave Policy
- Paid Time Off Policy
- Remote Work Expansion

This work includes creating a sense of inclusion and belonging for every Carnegie employee, their families, and those they interact with begins with leaders who are aware of their own implicit biases and intentionally seek input from varying perspectives and experiences. In 2020, we invited all employees to take the Intercultural Development Inventory and participate in a one-on-one debrief with a facilitator. This powerful tool showed alignment or misalignment between where each person perceived themselves on an intercultural competency spectrum compared to where they actually exist on the spectrum. Participants were invited to take a deeper dive into their results through participation in a confidential debrief session with a DEI Advisor. Those who opted to schedule the debrief were also encouraged to make an action plan to help move participants to where they desired to be on the same spectrum.

Gaining greater self-awareness spurred momentum to invest in structural and procedural changes in the years following. We began by expanding our all-remote positions from approximately half of our openings to almost all of our roles; this allows qualified candidates from across the country to join the team without limiting our selection pool to those living near or willing to relocate to our physical office locations in Westford, Massachusetts and Matthews, North Carolina. After eliminating in-person requirements, we prioritized recruitment in larger metropolitan cities such as Atlanta,

Charlotte, and Detroit and from Historically Black Colleges and Universities. While the recruitment of more historically underrepresented employees is a start, we know it is equally critical to look at our processes and systems such that we nurture a truly inclusive and equitable culture. It's this type of culture—one of equity, opportunity, and a sense of belonging—that will allow us to retain the people we hire.

In the last year, we hosted a Women-in-leadership panel, developed a Workplace Language Guide (to highlight commonly used words and phrases that have lesser-known offensive or derogatory meanings), and conducted company-wide trainings on preferred pronouns, microaggressions, Historically Black Colleges and Universities, as well as on the intersectionality of recent demographic shifts, social (in)justice, political tensions, and the impact on higher education. We've also created eight Employee Resource Groups (ERGs), each led by employee leaders and an executive sponsor. Those groups include (in alpha order): BIPOC, Disabilities + Chronic Health Conditions, Early Career Professionals, Faith + Work (all faiths), LGBTQIA, Neurodiversity + Mental Health, Women in the Workplace, and Working Parents. Membership lists are not publically available; these groups are working to cultivate belonging, spread awareness and understanding, and initiate impact on our company.

Because we are a work in progress and don't want to fall into patterns that limit our recognition of needed change, we invite accountability from within and outside the organization.

Internally, we've established a Bias Incident Reporting form and protocol and provided training on its use. We were challenged by our employees to instill firm anti-discrimination boundaries with our clients and have added a non-negotiable "Non-Discrimination by Client" clause to our contracts that includes both our people and the work they are asked to execute. We also issue a Workplace Climate and DEI survey every 12-18 months and use the top themes as impetus for change—particularly in our processes and policies.

As a result of the 2022 survey, we've updated our Paid Time Off plan to make it more flexible. While all employees benefitted, this was a result of hearing from working parents in particular who were consistently experiencing tension between scheduling time off and needing to hold on to days in case childcare fell through or their children got sick. We also enhanced our Parental Leave policy, increasing it from one to five weeks of paid leave to six to twelve weeks of paid leave (six weeks of bonding leave for all parents in addition to six weeks of birth and recovery leave for the birth parent). Finally, spurred by survey results, we're also in the midst of a role and compensation analysis project, ensuring aligned role expectations, fair pay, and equity across the company. This will coincide with a renewed look at our employee performance evaluations and hiring/interview processes yet in 2023, both of which aim to help us recognize and eliminate bias in our behaviors and processes.

External accountability is also a priority. We've established a Research Ethics Review Committee with outside representation to ensure our company-wide surveys on DEI topics do not create more harm than insight. We also have on retainer a Senior Advisor on Diversity, Equity, and Inclusion and Of Counsel—someone who is currently serving as a Chief Legal Counsel and Compliance Officer, Chief People and Culture Officer at a higher education institution. This individual advises our ERG leaders and sponsors, leads quarterly all-company trainings, and works closely with human resources, operations, and executive leadership to promote behavioral and structural inclusion (many of which have been detailed above). Another 2023 goal is to stand up a new advisory board for the company, filled with diverse representation from our client and organizational partners.

Data Security

Carnegie has multiple backup and security procedures in place to protect company data and business continuity. Company data from our corporate office is backed up using a combination of methods. On-site backups are performed daily and rotated on schedule with the inactive data stored in a fire-proof safe. In addition, data is further backed up off-site using a cloud-hosted backup service provider. Servers are protected behind firewalls and physically located in a climate-controlled server room under separate lock and key. Company data from our hosted servers located outside of the corporate office are likewise backed up at least daily and protected with multiple levels of physical and logical security. Staff have secure remote access to both corporate office data and hosted data via VPN to ensure continuity of business after hours or in the event of inclement weather or other disasters.

1st Party Data Handling/Usage

Your data will be transferred through a secure FTP or through a shared Google Sheet to ensure security and privacy.

Timelines + Task Management

Each account is assigned a dedicated account team—your primary contact will be an account manager; all day-to-day communications funnel through this contact to provide you with a clear and consistent communication channel to your Carnegie team. Additionally, a senior strategist, account coordinator, research analyst, design strategist, content strategist, and digital director will all be dedicated to your project. Additional subject matter experts are assigned to specific projects so you'll always receive support from the industry's best minds. Each strategist and specialist on the account team are held accountable by our entire leadership team.

We utilize a project management software called Asana that was selected specifically for its ability to facilitate multi-phase projects, both the high-level phased planning and the minute management of tasks and subtasks. Your account manager captains the creation and management of all timelines, and each member of your account team is assigned to specific tasks and subtasks. Progress of both tasks and phases are reported weekly and monitored by company leadership. At every step of the way, your account manager will supply you with specific next steps so you're well aware of what needs to happen to keep the projects moving smoothly. Due to the depth and breadth of Carnegie's portfolio of services, we've invested the time needed to develop efficient processes, process documentation, and project communication best practices so that each of our clients benefit from partnering with a single-source provider as well as an agile, potent team.

What happens when there is turnover with your team assigned to our project?

We pride ourselves on minimal turnover and creating lasting relationships internally and with our client partners. However, turnover is a reality within any company. In all disciplines, multiple people from our team are connected to your project. Specifically, that means you'll be supported by two to three people within each of the following teams: Account Management, Design, Content, SEO, Analytics, Development. In designing project teams with layers of staff we create critical redundancy, accountability, and quality assurance for each of our client partners. Documentation is also an integral part of our internal processes. For website projects, that means we're maintaining an evergreen client brief, project plan, and creative brief in addition to our task-driven communications contained within our Asana project management software and shared Google Drive folders.

When staff turnover occurs, we identify another staff member to become the project lead within that discipline—ideally it's another staff member already connected with the project. There's an internal collaborative effort to bring the new project lead up-to-speed, both by that team's manager and by the other project leads so that the client does not waste any time re-explaining or providing information. Our goal is to ensure that staff transitions are as seamless as possible from your perspective.

Digital Marketing

Recent RFI responses

[Rowan University](#)

[CU ODE](#)

- How have you used traditional media (and when) in campaigns that you have deployed?
 - As strategists first—and specifically, strategists who have first-hand experience leading admission and marketing teams in higher education—we make sure we understand your goals and unique challenges before we dive into marketing execution. The integration between digital and traditional media looks different for each of our clients. If desired by BSU, Carnegie can partner with the institution to effectively purchase and manage direct media buys such as billboards, print, local broadcast, etc. We can negotiate optimal placement and contract, oversee creative management to ensure continuity with digital efforts, and effectively track and measure the impact per channel, complete with recommendations for future placement. For all marketing initiatives, we look closely at your target markets and geographies to outline the best blend of digital and traditional media based on your goals and budget.
- What is your best practice when determining the mix of awareness vs lead generation tactics?
 - We evaluate the strategy mix based on your identified goals and your budget. If the goal is more brand awareness focused, we include top-of-funnel tactics like Display Outreach, video advertising on platforms like YouTube, pre-roll, and OTT/CTV, and social media outreach. When the goal is more geared toward lead generation, we opt for paid search and lead-driving social channels with proven success. Ideally, any plan contains a mix of both awareness and lead driving strategies but the percent of budget going toward each initiative will be dependent on your ultimate goal. And in nearly all cases, we strongly advise staying in front of prospects with retargeting tactics on both display and social media to ensure that you're kept top-of-mind for already interested individuals, helping them move through the funnel.
- Market research shows that BSU has some work to do to increase its awareness in the region, how would your advertising efforts aim to raise awareness of the university? How would you measure the effectiveness of those efforts?
 - When brand recognition is a main priority, we recommend running a wide variety of branding tactics on several platforms. We recommend running Display Outreach, Facebook/Instagram Behavioral, Mobile Footprinting, PPC, YouTube, Spotify, and Snapchat. We've found with other clients these tactics work the best in furthering branding and awareness and reaching new users in target audiences who would be interested in a school and/or a specific program. For areas where recognition is low, the main goal is to get the school's name out there to users in the target audience. This would require messaging to be high level to establish branding and awareness of a school in general within these markets.
- If a new campaign must launch midstream—say to promote a new program or summer session offerings—how long would it take to develop the strategy, create the assets and launch the campaign?
 - For event-based or campaigns that require a hard end date (application deadlines, for example), we request at least 2 months lead time as we recommend the campaign itself be in market for a minimum of 6-8 weeks. For campaigns that do not require a hard end date and do not need to run for a strict period of time leading up to that date, we are generally able to launch within 2 weeks provided that we receive swift approval on all assets and copy from your end. We require 3-5 business days for all ad copy development and more time if display banner ads or social ads or landing pages need to be developed, which can add to the launch timeline. We do our best to speed up launch time by

repurposing approved assets, copy and landing pages we already have on file and then swapping them out as new assets are available if needed.

- How would the advertising campaign you develop with and for BSU relate or tie into the University's website (bridgew.edu) and or SEO efforts?
 - Our first step in an advertising campaign is ensuring we understand your goals, audiences, and current marketing and SEO efforts. We will customize digital advertisements and strategies to seamlessly integrate with your existing website and any SEO efforts. If we are driving digital ad traffic directly to pages on your website for any campaign, we will always advise on ways to improve the content or layout of that given page for optimal user experience and to increase the likelihood of conversion.
- What role would retargeting play in the campaign that you develop? How have you used retargeting in the past with greatest impact?
 - We view Retargeting campaigns as a crucial tool for staying top-of-mind for prospective students who've already visited a site. These campaigns also tend to be great conversion drivers, because we can push an engaged prospect further down the funnel by prompting them to take the next step, such as scheduling a visit, requesting more information, or starting their application process. We use custom rules in the platforms to ensure the remarketing ads are only served to the most relevant audience. We also think it's pertinent to display campaign success to apply category and site exclusions from the launch of the campaign to ensure we're only delivering ads on brand-safe sites.
- Digital banner advertising tends to have a small measurable return on investment. What role does banner advertising play in a campaign you would create and how do you use them most effectively?
 - While banner ads don't necessarily provide the same direct results as other tactics, we equate them similarly to traditional or out-of-home advertising methods that work well to increase brand awareness and boost overall engagement when used in conjunction with other more measurable, action-driving tactics such as Paid Search. We apply conversion tracking to all campaigns we set up, including display advertising, so that when actions do happen we have the ability to tie them back to your campaigns. In addition to focusing on conversions tied to the campaign, we also look at the bigger picture by evaluating the total traffic driven to your site from paid advertising through Google Analytics and how those individuals engaged with your site after clicking on an ad.
- Can you describe your video production capabilities and how you would envision utilizing video in BSU campaigns?
 - We have in-house multimedia and video production experts who can either repurpose existing b-roll or produce custom video assets for use in campaigns. Please [click here](#) (password: carnegie) for a sample of videos we have produced for past clients. Once a concept is chosen, our team will work with BSU for subject selection, location scouting, and scheduling. For BSU, we have recommended Snapchat videos to reach and engage prospective undergraduate students as well as in-stream video YouTube ads to build awareness.
- If you were to identify one strength you bring to this work, what would it be?
 - We know BSU. We know your students, your faculty and your staff. We know what motivates your students through our "Darts" research. Through our Personality Research we learned what your faculty feel are the distinctive points of their work with students and the programs and services your staff provide to support and engage students throughout their BSU journey. We know where BSU has come from and where you want to go. We take all of this learned knowledge and combine it with cutting edge higher education digital marketing expertise you will not find elsewhere. While many agencies make higher education one of many verticals, connecting institutions with prospective students has been our almost exclusive focus since our earliest days.

- Specialize in and have majority of clients in higher education within the last three years, demonstrating that the Agency has a clear understanding of the complex culture and unique target markets within that specialty.
 - Twelve years ago, Carnegie became the pioneer of higher education digital marketing, and we've been leading the way ever since. Intelligent digital marketing that moves the needle for your awareness and enrollment goals requires constant adaptation and awareness of market changes. We have partnered with more than 600 institutions and as a result, we understand the nuances of executing and optimizing digital campaigns—including for complex institutions with multiple degree and program offerings (including online)—like no other firm. We have a deep understanding of the nuances of reaching and engaging prospective students: which platforms and tactics work best for the time of year and audience, how to align calls to action and messaging with each audience's position in the decision-making funnel, and which strategies drive conversions best. The journey from research to enrollment is quite a unique one when compared to other industries like ecommerce and B2B. We have become experts in understanding the student journey and knowing not only the right budget to allocate to certain devices, but also which keywords. Additionally, since we work exclusively in higher education means we have access to campaign data for hundreds of colleges and universities across the country, allowing us to create our own benchmarks to compare performance against.

- Describe your company's experience delivering these services: marketing strategy and development; consumer insights; media strategy, planning and buying; interactive/digital strategy; web strategy; creative; copywriting; production; and account management.
 - Carnegie has been a pioneer and pace setter for digital marketing in higher education for more than a decade. We can expertly deliver all requested services in house to seamlessly deliver the best results for CU. 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 can include a channel mix of: Display, Paid Search, Social Media Marketing, Streaming, OTT, and/or 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 our specialized media teams, we have creative and copy teams to ensure best practices and compelling ads are produced for each media type. 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 more than 600 institutions, including extensive work with online programs and entities, we have the unique ability to strategize and implement media across channels with an understanding of the nuances of reaching prospective students. We design data-driven strategies that increase engagement, develop affinity, and drive conversions.

Engage as a long-term strategic partner that is an extension of our internal team.

Time and time again, our clients tell us the value of choosing Carnegie is not only in the results we deliver, but the impact we make as a long-term strategic partner. We're committed to going above and beyond a transactional agency relationship and serving as an extension of CU's team. We see your wins as our wins and will commit ourselves to your success at every step. As such we believe in frequent and transparent communication, collaborative sharing and access to data, and providing ongoing insights to optimizations and performance. In return we always want to hear from your team of both the qualitative and quantitative challenges, successes, and goals being met or missed on campus. Together with open and honest communication it is our goal for our teams to join forces as one.

- Dedicated client management and strategy team including senior strategists and senior account team that will be assigned to CU's account. Dedicated media planning and buying team, including media supervisor, buyer and seasoned data analyst.
 - Our digital marketing division is composed of 80+ digital leaders, strategists, specialists, analysts, and subject matter experts. We are broken into specialty teams to deliver supreme subject matter expertise to include a dedicated: social media team, programmatic team, paid search team, digital strategy team, digital integrations teams, search engine optimization team, analytics team, and account management team. You will be assigned dedicated team members across each specialization with an assigned digital strategist who will provide strategy oversight and harmonize our teams to ensure a sound and holistic approach to your campaigns and solutions that are measurable and aligned with your key goals and objectives. While our structure ensures a deep level of expertise, with a dedicated account manager as your single point of contact, you can be reassured you will have the personalization and immediate response that you deserve.
- Confident, skilled and highly experienced leadership to manage day-to-day relationship and initiate timely and efficient communication, response and reporting.
 - CU's primary 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. The account manager not only plays an essential role as the main communication liaison between CU and Carnegie's digital team, but is also charged with coordinating campaign timelines, copy, and creative; trafficking ads; and gathering approvals. The account manager is also responsible for driving projects forward, updating media plans, running client calls, and answering any questions or concerns. In addition to your Account Manager, you have the backing of a highly specialized team of subject matter experts and strategists who are also assigned to specific projects so you'll always receive support from the industry's best minds.
- Proven history of strong focus and capabilities in data-driven digital media strategic research, planning, development, execution and reporting, including: paid and social campaigns and budgets, Paid Search/PPC, SEO, Digital Display/Retargeting, Media placement
 - Data is at the center of everything we do and every campaign we run. We draw on our experience successfully running thousands of digital media campaigns across higher education which we lean on when building new campaigns and reaching your audiences. We have access to benchmark data from similar institutions as well as audience targeting, segmentation, etc. specific to higher education. For our clients who implement custom audience segments (Darts) we can further segment digital campaigns based on specific psychographic attractants and areas that will appeal to your prospective students. Having dedicated teams to each of these specialized areas ensures a focus and level of expertise that translates into the best campaign performance. All our team members are required to have certifications in their speciality areas and with our Premier Partnerships with companies like Google, Facebook, LinkedIn, Snapchat and more, we are held to a higher standard and rigor by these companies to maintain our Premier status. In addition, NAGAP, the Association for Graduate Enrollment Management, has looked to Carnegie as one of its original strategic partners for the past several years. In addition to awarding one of our team members the Innovation Award at its last annual conference, NAGAP works with us for research efforts, thought leadership content, webinars, white papers, and marketing insights in the world of graduate enrollment management.

Proven experience in Creative Development (display, social ads, landing pages, etc.) including visual and copywriting, and specifically SEO long and short-form copywriting.

As a full-service agency for higher education, our team is fully equipped to develop all creative development support needed for your campaigns. We offer a full suite of creative and marketing services, from campaign concept development and multimedia to digital ad design and placement. All our creative development is crafted with best

practices for each platform we serve. Our in-house SEO team provides a full suite of services, including but not limited to technical site audits, content optimization, long and short-form copywriting, organic social media consulting, and more.

Experience in development, set-up and back-end management of 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 team will leverage industry best practices and work with CU 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.

Proven thought leadership in industry best practices, trends and innovation.

As self-proclaimed digital geeks, we're committed to staying on the cutting edge of an ever-changing landscape. We have direct partnerships with multiple leading digital media platforms including but not limited to Google, Facebook, Instagram, LinkedIn, and Spotify. These relationships ensure we are continually tuned into innovations, data, insights, and beta opportunities in advance of other agencies—all of which translates directly to stronger opportunities for our client partners. We host monthly webinars, publish blogs, whitepapers, and host digital marketing workshops, seminars, and conferences, including our Annual Carnegie Conference that has been running for 10 years.

Proficiency in CRM systems, preferably Slate.

In 2021, Carnegie merged with Underscore, the country's largest dedicated Slate development and optimization company and Technolutions' first Platinum Preferred Partner. Underscore's team of Slate experts have worked with more than 100 schools across the country to help optimize their Slate instances through implementation, student search marketing and enrollment communications, enrollment strategy, applications and portals, personalized training, and creative work. Slate is one of our clients' most frequently used CRMs, and we provide direct Slate integration into digital media planning, targeting, and tracking. Our team works hand in hand with client partners to integrate digital lead generation efforts and landing pages directly to the CRM whenever possible, and we can assist with providing directions and integration guides for the most frequently used CRMs. Utilizing an automation tool, Zapier, we can integrate campaigns running lead generation advertising on social media platforms like Facebook, Instagram, and LinkedIn. Our staff members are completely trained experts on setting up these integrations at the beginning of your campaign. Additionally, for clients utilizing Carnegie Clarity™—our proprietary website personalization and attribution tool—we can provide direct integration into Salesforce for web attribution and custom website interactions on a 1:1 identified user basis. Regardless of your CRM, we will work with you to ensure we're generating and connecting you with quality leads in a timely manner.

Proven history of providing strategic planning, tactical planning and buying with superior knowledge and ability to research audiences and vehicles/contacts, strategize on the best use of media in the defined market, negotiate rates, handle media invoicing, auditing and bill paying.

We run all campaigns in-house and buy/place media directly on the platforms and exchanges. In addition to working directly on each platform we operate on a DS, DV360, to give us access to increased inventory for display, streaming, and video. We handle all the billing and auditing of invoices internally.

Ability to provide a media calendar for the fiscal year that includes all scheduled/planned advertising/marketing projects. Access to appropriate research tools for basis of media placement recommendations.

Carnegie provides an in-depth media plan that details monthly spend by platform. The media plan showcases both actual dollars spent in months prior and forecasts out projected spend for the months ahead. The media plan is a live document in our campaign dashboard so you will always have access to the most up to date information 24:7. We utilize several planning tools that platforms offer like Search Console, Google Keyword Planner, Facebook and LinkedIn's audience builders, and Google Analytics.

Understand and comply with CU Boulder's branding standards which includes but is not limited to logos, brand guidelines, and color schemes.

Understood and will comply. As a full-service higher education digital agency, our team is familiar with the requirements of brand adherence for institutions.

Indicate what methodology your company uses to formulate plans to complete the services described in the qualifications?

Following discovery meetings with CU ODE to ensure we understand your goals and key objectives for digital strategy, we will develop a custom media plan with specific recommendations for channels, keywords, audience targeting, and more.

Indicate the unique innovations their company has developed for clients in similar types of projects

Carnegie offers a number of proprietary digital advertising tools and capabilities not found anywhere else. These include unprecedented audience targeting from our proprietary CollegeXpress database, industry-leading IP Targeting match rates, psychographic persona-based digital targeting, and more. Through Carnegie Clarity™, our proprietary website personalization and attribution tool, we can provide direct integration into Slate for web attribution and custom website interactions on a 1:1 identified user basis.

Indicate the company's approach to a project so that the outcome is visible at the beginning?

Carnegie media planning starts with discovery meetings to explore your goals and audiences. We will then put together a detailed and fully customized media plan with specific recommendations for audience targeting, channel selection, keyword strategy, and more. Each goal has a Key Performance Indicator (KPI) tied to it that we measure against, such as number of form completions, percentage lift in traffic, open house registrations, video completions, etc. KPIs are tracked daily and can be seen in your live dashboard alongside of campaign insights that are annotated within the dashboard throughout the month. In this way you will have full transparency at any time into campaign performance and insights all along the way to consistently measure the results of each platform and tactic.

Work Plan: Indicate how the company develops a work plan so that milestones and activities are clear and objective.

Starting from our first meeting, we'll work to establish clear milestones and activities throughout ODE's campaigns.

Month 1: Finalize strategy and media plan, In-depth audience research, creative and copy production, analytics and conversion tracking setup

Month 2: Campaigns launch, initial campaign optimizing begins

Month 3: Analysis of first month of performance completed, Recommendations for improvements provided, larger optimizations like budget shifts begin

Month 4: Analysis of second month of performance completed; recommendations for improvements provided; larger optimizations like budget shifts continue; more concrete A/B test results can be seen

Provide examples of finalized work plans for a similar project.

Please see sample media plan in ODE's financial proposal. Our proposed plan includes multiple media strategies designed to optimize awareness and generate inquiries.

Indicate how progress is tracked during a project in order to ensure the client's objectives are being achieved?

Before tracking or optimizing a campaign, we ensure our team and yours are on the same page about high-level goals and individual campaign-level goals. On a campaign-level basis, goals are set so we can identify what we want to optimize towards: impressions, clicks, video plays, conversions, etc. Assuming those goals are in place, we utilize a proprietary system connected to each ad account through API integration to track which campaigns are pacing to spend in full, overspend, or fall short of the budget spend. Campaign pacing reports are pulled at least twice per week, and platform budgets are adjusted accordingly to help campaigns get back to intended spend levels. We also use this system to ensure quality assurance checks are taking place weekly and to note any optimizations that were made to campaigns, although

the optimizations are made in the ad platforms themselves. Typically, this process involves a senior level digital strategist analyzing performance and making more tactical optimizations directly. 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. .

Include a projected timeline to necessary to meet the requirements of this project, including appropriate milestones, start-up tasks, and identifying client and supplier responsibilities.

Day 1 (based on ODE team 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 2 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. Recommendation, 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.

Conclusion of campaign: Highlights of campaign are discussed, and opportunities for improvement and new recommendations are provided

Portfolio: Overview of client's challenges or goals and a recap of what you accomplished on the client's behalf. Detail how you developed a strategy/approach, analyzed the client's target audiences and determined optimum communications/media outlets. Detail how you worked with media outlets and the results achieved to increase a client's exposure, track results and calculate ROI.

As part of our extensive portfolio of higher education clients, we have executed hundreds of campaigns which promote online/distance learning—either as part of an institution's larger campaign strategy or as a specific area of emphasis:

The Online division of the University of North Texas needed a digital marketing partner to achieve its enrollment goals for several key programs. Through Carnegie's proprietary consensus-driven approach, Carnegie embarked on extensive brand discovery work to uncover UNT's authentic personality. As a next step, UNT needed us to apply its University brand and drive awareness and enrollment growth for several priority graduate programs including Education, Analytics, Business, Hospitality, and Merchandising. We implemented tactics including Paid Search, Display Outreach and Retargeting, Spotify, LinkedIn InMail, and lead generation campaigns on Facebook and Instagram. We customized digital messaging with the University's personality traits identified in the University-wide reputation strategy engagement as authentic to UNT and unique in the University's market. UNT Online's strategies drove impressive results both in terms of digital KPIs and enrollment outcomes. Campaigns generated consistent month-over-month growth, totaling more than 14

million impressions, 56,000 clicks, and 3,000 conversions. UNT also saw growth in awareness in just one year, with Carnegie's campaigns generating more than 36,000 page views to UNT's site and an overall increase of more than 110% in social media followers. In 2020, UNT generated more than 950 applications across the programs we promote—a 74% year-over-year increase. Further, there were more than 660 total accepted applications—an 87% increase year over year. Bolstered by Carnegie's suite of marketing strategies, UNT saw a 20% increase in overall graduate enrollment for fall 2020.

Dartmouth College sought to enhance enrollment growth for its newly established residential Master of Science in Quantitative Biomedical Sciences (QBS) program. Primary goals included increasing enrollment through lead generation and improvement in lead-to-enrollment conversion rate. Dartmouth chose Carnegie through a competitive RFP process to grow the program's digital footprint. Building from preliminary recommendations we developed for the program's proposal, we strategized and implemented a full-funnel digital plan that ran from March 2020 through May 2021. Primary strategies included Display Outreach for awareness building, LinkedIn and Facebook for inquiry driving, and PPC and RLSA to reach prospective students actively researching this niche program and programs like it. We also implemented list-based IP Targeting and social campaigns to reach a purchased list of GRE registrants. From inquiries to applicants to enrolled students, Carnegie's digital campaigns drove positive growth for QBS. All Carnegie paid media channels delivered applications, with Google paid search delivering the highest performance. Digital campaign efforts generated more than 235 inquiries, many of whom started and submitted applications and ultimately enrolled. In addition, multiple applicants interacted with Carnegie RLSA ads during their search process, which helped guide them further through the funnel. With increases in view-through activity and analytics KPIs, Dartmouth's marketing leadership recognized the positive impact of our digital partnership in driving enrollment growth for the QBS program.

A large online university needed to increase its organic search presence and drive more prospective students to its microsite. Carnegie rewrote and optimized on-page content to improve search engine visibility as well as on-site user experience. Optimization began with program pages, identifying the most searched-for and qualified keywords for each unique program while curating content that included these keywords and answered common prospective student questions. Once all program pages had been optimized, we optimized secondary pages such as specific program career pages and admission and tuition pages. Carnegie tracked the performance of target keywords for each optimized page for national search result performance as well as local performance in the state where the University is located. After six months, the online University now holds the #1 position on Google for 17 keywords. These keywords target seven distinct programs; 45 keywords rank in the top three positions, and 36 additional keywords rank in the top 10 positions. In total, 81 keywords selected and optimized by Carnegie are now ranking on the first page of Google. The University has also earned a featured snippet for two target keywords optimized by Carnegie. Carnegie also tracked site performance through Google Analytics. Overall, organic traffic improved dramatically in a year-over-year comparison. Comparing June 2017 to June 2018, organic site traffic increased by 196% from 2,396 to 7,099 organic visitors. New users increased 261% from 1,340 to 4,842. The bounce rate of the site overall dropped 10%, indicating that new users are arriving and exploring the website at length.

Carnegie conducted University personality research, external perception research, and competitive audit research to determine the best strategy for establishing a cohesive University of Missouri System Online brand while still acknowledging and preserving any established brand identities and assets of each of the System Universities. Then, a visual identity for the unified System-wide eLearning entity was established, including name creation, name testing, logo development, and campaign concept. We now work with the University in an extensive digital marketing partnership focused on building awareness and engaging prospective students through strategies including Display Outreach and Retargeting, paid search, social and streaming media, and Google Analytics.

Provide a list of research tools (for example, Google Keywords, Nielsen Media Research, Brightedge, etc.) that the agency has access and uses on behalf of client services.

We leverage in-platform tools, such as Google Keyword Planner and Facebook's audience builder to identify and target the most relevant audiences for each campaign. If CU has run prior campaigns and is willing to share access or reporting,

we can review performance within the platforms as well as within your Google Analytics and/or Google Search Console accounts. We also utilize vendor direct strategies (i.e. Pandora or Hulu), which are conceptualized based on vendor data, campaign goals, and KPIs. For Search Engine Optimization services, we also utilize SEMRush, Screaming Frog, and Answer the Public.

Experience and knowledge of online/distance education

Carnegie provides marketing solutions for multiple online/distance education clients, including but not limited to Lipscomb University Online, Miami University Online, Missouri Online, Ohio University Online, and Oklahoma State University Online. We also have extensive experience executing hundreds of campaigns promoting specific online programs being offered at traditional institutions. We will leverage our aggregate insights engaging these unique audiences in a potential partnership with CU.

Describe in detail your ability and approach to providing the services listed in Section II, Statement of Work.

Search Engine Marketing: Appearing in prime search engine real estate is key for CU's success in the modern digital landscape—but competition is fierce. We are experts in constructing, running, and optimizing PPC campaigns to maximize top results on search engines like Google, Yahoo, and Bing to drive leads and conversions. When developing a paid search strategy, our paid search team utilizes several different platforms and tools for keyword research. We use this research to develop not only a strategic, holistic approach to the keywords we bid on but also a robust list of negative keywords to proactively exclude. Additional search targeting from Google allows us to target PPC campaigns beyond just keywords. We can layer in targeting to reach prospects by gender or age or bid by device type to optimize to the devices that are converting best. We will also make full use of Google's structured Snippets with Callouts to improve your ad relevance and give you more room to display information that will attract prospects who are ready to take action. At launch, we will execute up to three different ad variations per ad group according to Google's best practices, and then monitor performance throughout the duration of the campaign to optimize as needed. Our Paid Search team is comprised of Search experts that also work hand in hand with our Search Engine Optimization team to ensure best results both paid and organic.

Research: Our team utilizes tools to look at projected campaign performance across different ad platforms to help determine the best tactics and budget levels. Being a higher ed focused agency, we have a database filled with past performance data to be able to better understand trends and benchmarks within different types of institutions, segments, audiences and markets allowing us to put forward an initial strategic plan. Any prior CU marketing results that can be shared to our team will be reviewed and incorporated into our initial plan to make sure we're working off prior findings.

Planning: Our team will set up an initial kickoff call to talk through key information including goals, key deadlines, target audiences, priority months, etc. to ensure we're aligned with what success looks like prior to launch. A media plan will be shared out showing projected spend levels for each audience and platform for full transparency on our planned campaign execution.

Account set up and management: Our account set up process is flexible depending on what works best for the institution. We have experience creating new ad accounts for the different channels and sharing out client access or working out of pre-existing client owned accounts. 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 making sure 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 optimizations to ensure best results. In addition to our monitoring and ongoing analysis you will be provided with a live performance dashboard. The Data Studio dashboard will showcase KPIs like: Cost Per Lead, Cost per Click, top performing keywords, lowest performing keywords, conversion trends, and ad copy performance details so you always have transparency into campaign performance metrics.

Creative: As a full-service agency for higher education, we are fully equipped to develop all digital content and related communications and social media strategies needed for your campaigns. We offer a full suite of creative and marketing services, from campaign concept development and multimedia to digital ad design and placement. In addition, we create campaign constructs that incorporate cross channel outreach, identify key segments, and offer best practice timing. We are able to implement this strategic foundation, or work with you to bring the integrated strategy in-house.

Describe how you work collaboratively with a client's internal team. If you have a brand/creative strategy process or approach, describe it and its benefits to the client. Include the process's flexibility and how you adapt it based on a client's existing brand, creative assets, needs, timeline and budget.

Our team will provide ongoing evaluation and monitoring to ensure we are seeing the results you expect. Our communication with you is as consistent as needed to ensure proper execution of the campaign and all expectations are met. We will execute an efficient technical campaign, provide ongoing evaluation and monitoring, and facilitate a two-way communication channel. We want to collaborate with you along the way and hear your insights as CU's experts. We will gather any qualitative and quantitative data available, which will all contribute to our ongoing education and future improvements. Our team is dedicated to an intelligent and high-touch campaign management style. Our commitment to in-house execution means we can prioritize performance above all else. Your budget will be fluid across tactics to truly optimize performance. We will capitalize on insights gained from your campaign and allocate your spend for the best possible outcome. In addition to the digital services quoted in this proposal, Carnegie offers a complete suite of research, strategy, and creative services that can be implemented alongside digital strategy to differentiate your campaigns and engage prospective students with even more strategic and creative campaigns.

Provide a list of research tools (for example, Google Keywords, Nielsen Media Research, Brightedge, etc.) that the agency has access and uses on behalf of client services.

We leverage in-platform tools, such as Google Keyword Planner and Facebook's audience builder to identify and target the most relevant audiences for each campaign. If CU has run prior campaigns and is willing to share access or reporting, we can review performance within the platforms as well as within your Google Analytics and/or Google Search Console accounts. We also utilize vendor direct strategies (i.e. Pandora or Hulu), which are conceptualized based on vendor data, campaign goals, and KPIs. For Search Engine Optimization services, we also utilize SEMRush, Screaming Frog, and Answer the Public.

Content Marketing

Carnegie's approach to content marketing is rooted in SEO best practices and always driven by your site's data. Our SEO and Content team utilize keyword research tools and platforms such as Google Search Console and Google Analytics to identify content opportunities that will drive organic search engine visibility and traffic. We optimize existing site content and create new thought leadership content on a consistent basis to attract prospects and provide a positive on-site user experience and impression of your institution.

How will you integrate with with the university's analytics or attribution platform?

Carnegie will utilize your web analytics platform, typically Google Analytics, so your institution owns and can access the data. To ensure the best data collection, we will work with you to ensure analytics event tracking is in place for the KPIs that matter to you and that UTM parameters being used in campaigns are consistent and clear. In cases where an institution is using a third party attribution platform, or their own in-house dashboarding tool, we will make raw campaign data available for ingestion into your platform either from our data warehouse or from the ad platforms directly.

Digital Fees / Billing

Overview

Carnegie charges a campaign setup fee, which covers our team's time to build out all campaign targeting and messaging as well as to set up each campaign with the appropriate targeting within each platform. We then charge a management fee and a reporting fee based on the media spend each month. The management fee covers day-to-day campaign management and optimization. We have a full team that will be dedicated to your account and the daily monitoring of your campaigns, making targeting, bid, and messaging adjustments as needed to ensure we meet your goals for these efforts. The reporting fee covers unlimited access to a live dashboard and in-depth monthly analysis reporting.

Please break down the agency fee so we can understand the makeup of the total percentage.

Carnegie charges a monthly fee as a percentage of media spend that covers strategic management, ongoing optimization, bidding, content and creative changes, and calls or visits needed to ensure the success of your campaign. It also covers all ongoing recommendations for strategy adjustments and platform updates as well as providing you access to a live reporting dashboard. Additionally, we provide access to a live dashboard which gives you full transparency into campaign performance and live adjustments, optimizations, and campaign insights. Recommendations will also be provided monthly based on campaign performance and provided to the client through email or via a strategy review call. We also charge a setup fee per campaign that includes all initial strategy discussions, planning, message development, and campaign setups in the platforms. This fee encompasses all of the services required to initiate campaigns and ensure the services outlined are launched and delivering.

Hourly Rates

Carnegie doesn't charge an hourly rate or restrict our work to predetermined hours as we like to offer unlimited support for our clients and their campaign needs.

For digital marketing services, we charge a monthly fee as a percentage of media spend that covers strategic management, ongoing optimization, bidding, content and creative changes, and calls or visits needed to ensure the success of your campaign. It also covers all ongoing recommendations for strategy adjustments and platform updates as well as providing you access to a live reporting dashboard. We also charge a setup fee per campaign that includes all initial strategy discussions, planning, message development, and campaign setups in the platforms. This fee encompasses all of the services required to initiate campaigns and ensure the services outlined are launched and delivering. Other services, including Slate, research, strategy, creative, Analytics, and SEO services are billed separately on a per-project basis.

When hourly rates are required (check with Alexa/Jorie before using)

Digital: \$150

RSC Account Manager: \$150

Content Strategist: \$126

Design Strategist: \$126

Research Analyst: \$160

Provide an overview of billing and expense practices, explaining what percentage of the budget we should expect to go toward agency fee, strategic planning, creative/production, media buying/planning, research and analytics, and/or other expenses. We understand that this will be impacted by the final project scope.

All fees for media buying, planning, research, analytics, SEO, and campus visits are included in the accompanying digital media proposal. Billing is done on a per month basis, based on actual media spend and corresponding fees for the month. For example, the invoice you would receive in August would be for actual media spend from July and corresponding

agency fees associated with that spend. Some items are billed up front, such as set up fees, landing page production, and Carnegie Clarity licensing fee.

Standard Billing Terms

Net 30

Approach to Digital Ad Creative

We believe a thoughtful and collaborative approach to creative work is crucial. As a full-service agency for higher education, we boast an in-house Creative team that has developed compelling and impactful campaigns for institutions across the country. Our team knows the digital nuances that will be most effective from a creative standpoint for ads served on websites or social media versus a billboard or print. In terms of our company's creative outlook, any creative work we do starts with ensuring we've done all we can to understand your brand, the authentic personality of your institution, and what will resonate most with the specific audiences you need to make a connection with. We are equipped to develop the creative and ads for any of the platforms and strategies we're partnered with you for, and our team of inbound and web experts can provide you with unmatched content development. From a process standpoint, if we're handling the Display or social creative for marketing campaigns, we first work with you to gather all necessary assets. Our Creative team then works on developing creative mock-ups that will resonate with your unique identity, which we then send for review, feedback, and approval. We'll make suggestions regarding recommended calls to action, formatting, and more. If we receive any creative developed by you, we'll provide feedback and additional recommendations if needed. We also highly recommend that our clients consider refreshing their creative every two to three months to avoid ad fatigue among the target audience. This allows us to ensure the most relevant and timely message is being portrayed in your ads.

Client Onboarding: Digital

We will start with kickoff and planning meetings between all members of the teams. We'll confirm goals, audiences, and priorities 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.

International Experience

We've strategized and implemented multiple successful international awareness and lead generation campaigns, largely leveraging Display and social media advertising to engage prospective students. With some specific limitations, we can apply any digital targeting capabilities toward international recruitment. Here are a few examples of successful international audience digital campaigns:

We've promoted the University of Cincinnati's Master of Engineering program in Asian and Indian markets to support the University's international recruitment efforts. Strategies included LinkedIn, Facebook, and Display Advertising to generate awareness and leads. In just four months, we served millions of impressions and generated more than 400 inquiries.

The College of Wooster needed to generate interest and build brand visibility in new international markets. We strategized digital tactics including Mobile Location Targeting, Display Outreach near feeder high schools, Facebook and Instagram behavioral targeting, and Retargeting. This cost-effective digital campaign helped drive three consecutive years of record international applicant and enrollment numbers.

Rutgers University-New Brunswick was looking to reach prospective students in India with a goal of generating awareness and inquiries. We strategized a digital campaign that included branding/awareness and lead generation campaigns through Facebook and Instagram, as well as Retargeting students who had previously expressed interest. In two months, campaigns drove more than 8,200,000 impressions and 101 inquiries.

Conversion Attribution

We append UTM parameters to all of our digital campaigns for tracking purposes within your Google Analytics and CRM. We also set up conversion tracking for each of our campaigns so that we can accurately report on conversions for each particular channel. When providing you with conversion numbers, we provide both direct and view-through conversions so that you can clearly see which occurred directly as a result of seeing a paid ad and which conversion actions were taken at a later time, assisted by a paid advertisement. If you are looking for more in-depth attribution, including campaigns you may be running with other agencies and organic traffic, we do offer a proprietary service that has more robust cross-channel attribution capabilities.

Scalability

RESOURCING

Explain your ability to scale up resources and how that process would work as we might add schools or units within our institution to the agency contract.

Carnegie has multiple digital teams within our overall Digital Division. The division comprises five Paid Media teams, an Account Management team, a Social Media team, and an Inbound team. We also have another division dedicated solely to market research, enrollment strategy, reputation strategy, and creative—So we're well equipped to scale our resources to meet your needs with our sizable staff and diverse subject matter expertise, but we can add additional resources as necessary to ensure we are fully supporting the size and scope of your contract. Specifically for your University we will assign and assemble a team of digital strategists, campaign managers, creatives, researchers, and a dedicated account manager to support all your projects. Having a set core team will ensure our team has University-wide knowledge of all the campaigns and projects running to maximize our knowledge of your University brand and a smooth flow of communication between your team and ours.

PROJECT SCALE

We work with clients large and small, and all of the proposals we build are unique to each situation and can be adjusted based on your needs. We've worked with some institutions that simply need to run a three-month seasonal campaign for \$15,000 and others that use us for all of marketing execution and spend over \$500,000 for an annual campaign. Regardless of the budget available, we will be fully transparent on the scope of the project and the reach you can expect.

Provide detailed examples of experience placing and managing multi-million-dollar digital campaigns.

As the most experienced higher education specific digital agency, we have the opportunity to work with institutions in a variety of ways, everything from working with a school on a singular program all the way to being named the agency of record and supporting an entire campus. In cases when we are asked to support a large-scale client we have a dedicated team that is devoted exclusively to these types of client engagements. This team is skilled and trained explicitly for larger and more complex projects and is made up of multiple senior level digital strategists, experienced account managers, dedicated PPC and Social Media Specialists, and a campaign manager all fully devoted exclusively to the account. There are multiple layers for each position to ensure necessary redundancy on the campaign so there will not be knowledge gaps and to provide the highest level of expertise, care, and service a complex client requires. Through our premier partnerships, our high value clients will also gain additional support directly from our dedicated platform teams at Google, Facebook, LinkedIn, and others, that will work in tandem with our digital strategists to carefully monitor campaign performance, optimizations, and ensure all best practices are being made on these accounts.

Adaptability / Maintaining Leading-Edge Status in Industry

How do you evaluate new media opportunities and how do you adapt to market changes?

Intelligent digital marketing requires constant adaptation and awareness of market changes. At Carnegie, we're committed to staying on the cutting edge and keeping you in the know through our partnerships and direct access to best-in-class research, data, and beta products with industry leaders, including LinkedIn, Google, Facebook, and more. As a Google Premier Partner—a designation achieved by only a small fraction of agencies—we are held to Google's highest standards of expertise, certifications, and performance.

Higher Ed Digital Expertise

At Carnegie, higher education isn't just one area we work in—it's been our focus for the past three decades. Additionally, many of our staff have worked at universities and colleges, so we understand the enrollment cycle, challenges you face, and expectations of your prospective students better than anyone else. In short, we get it, and you won't spend your valuable time educating us on your industry. You get more for your money when your digital campaign is well run. Because Carnegie works almost exclusively in higher education, we have concentrated insights—which lead to the best decisions for your campaign. We've developed benchmarks, budget strategies, reach, and frequency volume that lead to conversions and tactical adaptations unique to higher ed. Digital is not a one-size-fits-all channel, and our insights will help tailor the most effective strategy for you.

Please provide your documented procedures for managing higher education accounts.

Carnegie became one of the original pioneers of digital marketing for higher education 10 years ago. In that time, we've partnered with more than 600 institutions. As a result, we understand the nuances of executing and optimizing digital campaigns—including for complex institutions with multiple degree and program offerings—like no other firm. We have a deep understanding of the nuances of reaching and engaging prospective students: which platforms and tactics work best for the time of year and audience, how to align calls to action and messaging with each audience's position in the decision-making funnel, and which strategies drive conversions best.

Define how the supporting teams will manage strategic and tactical duties, including who will provide strategic leadership.

Specifically for your institution, we'll assemble a team of digital 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.

Outline your experience in working with clients through multiple rounds of edits and design changes through the review and approval process, while adhering to deadlines.

We use Google templated sheets to channel all copy to ensure we remain within restricted character limits per platform and collaborate with clients on these sheets. You will have access to these sheets to make any copy edits and adjustments. Nothing goes live without final and explicit approval from the client. We utilize Asana for creative revision project management. Having worked with multiple higher education clients, our team is familiar with the review and approval process required for digital campaigns. Guided by your account manager, we'll ensure creation and management of relevant timelines and thorough communication to ensure deadlines are met. If needed and/or preferred, we can provide access to Asana and/or Google Drive files used for campaigns.

The journey from research to enrollment is quite a unique one when compared to other industries like ecommerce and B2B. Working solely in higher education, Carnegie has become experts in understanding this journey and knowing not only the right budget to allocate to certain devices, but also which keywords. To constantly improve impression share, reduce our CPC and CPA, we constantly work on improving our Ad Rank by focusing on improving quality scores to generate efficient leads. We subscribe to SEMrush and routinely use it for keyword research and competitive insights. Additionally, working exclusively in higher ed means we have access to campaign data for hundreds of colleges and universities across the country, allowing us to create our own benchmarks to compare performance against.

General campaigns are a great way to build the top of funnel and grow awareness, so they are a strategy we always recommend. Program specific campaigns always convert at a higher rate so we always suggest a mix of brand, general, and program specific campaigns utilizing a variety of campaign match types to achieve our goals. You'll have a dedicated campaign manager who on a daily basis will pace your campaigns, monitor search terms, make bid adjustments, and implement other small strategic optimizations.

Digital Industry Trends

What major industry trend(s) is/are your company responding to?

Intelligent digital marketing requires constant adaptation and awareness of market changes. At Carnegie, we are committed to staying on the cutting edge and keeping you in the know through our partnerships and direct access to best-in-class research, data, and beta products with industry leaders, including LinkedIn, Google, Facebook, and more. This year, we've been working closely with our client partners to respond to the impact COVID-19 has had on higher education. We immediately adjusted all campaigns in the market by adding negative keywords, adjusting creative, pivoting to strategies that maximized increased screen time, and altered Calls to Action. Additionally, we felt that our industry could benefit from shared knowledge and discussion. Utilizing the strength of our in-house research team, we conducted student surveys to assess their mindset and plans in March and repeated the study after May 1. We've also conducted weekly webinars and videocasts to bring our experts together with institution VPs and marketers to discuss industry challenges and solutions.

Agency Collaboration

Provide examples of how you have collaborated with other agencies when you share the same client.

While Carnegie is a full-service agency that can support everything from research to creative and brand strategy to digital marketing execution, we have partnered with many other agencies and companies in the past to best serve our joint clients. These include:

- Sharing our paid search keyword strategies and target audience details to ensure we're not competing against each other in the search engines and other digital marketing channels
- Collaboration on creative and messaging to ensure brand consistency across all efforts
- Participating in joint in-person meetings and/or conference calls to discuss client strategy and/or performance
- Working together to develop launch timelines, if another agency is handling creative/video production, based on when assets will be made available
- Synchronizing campaign launches across all channels and platforms to ensure effectiveness and efficiency of overarching marketing strategy

Digital Research

We have a number of layers of research that go into a campaign. This includes research on the institution, research on current marketing efforts, research on industry benchmarks, and research on trends in the law market. All of this will come into play as we build and analyze your campaigns.

Digital Audience Segmentation

With experience serving over 600 higher education clients, we understand the nuances of reaching prospective students—which platforms and tactics work best for the time of year and audience, how to align calls to action and messaging with each audience's position in the decision-making funnel, which strategies drive conversions best—like no other firm. While many proposed platforms are similar between undergraduate, transfer, and graduate audiences, the nuances of our approach for each are vastly different and informed by our knowledge of demographics, qualifications, audience development, messaging and calls to action, and annual timelines. We are recommending a variety of outreach tactics to generate top-of-funnel leads. Retargeting and list targeting will then play on brand familiarity and serve content like application or event ads specific to the next step in the prospective student journey. Search complements each position in the funnel—we capture brand, location, and program-related terms on the Google Search Network as users are beginning their college search, forming their consideration set, and forming their ultimate decision.

UNDERGRADUATE

We know Gen Z is highly engaged on social media, streaming, search, and Display networks whether they're browsing aimlessly or with a purpose. We've proposed undergraduate campaigns to build brand awareness and drive conversions by reaching prospective undergraduates where they're already engaged. Proposed undergraduate strategies for your University include best-in-class IP Targeting, Audience Select (the most precise Display advertising available in higher education), custom college search-related affinity audiences, behavioral targeting to 15–18 year olds in your regions of choice, and geofencing feeder high schools.

TRANSFER

Reaching transfer audiences and driving them to action demands working with a firm that knows not only which tactics are possible but which will be most effective for reaching a very specific audience. For your University, we've proposed Display, Facebook, and Instagram advertising specific to transfer audiences as well as mobile location targeting and PPC campaigns near feeder community colleges.

GRADUATE

We built your graduate strategy around your two priority departments: College of Natural Resources—Online and College of Letters, Arts, and Social Sciences—Online. According to HighEdWeb in 2019, graduate students are more likely to enroll at a local institution regardless of whether the courses are online or on campus. Our proposal for your University aims to improve and nurture brand awareness and loyalty in local markets. We've proposed branding, awareness, and lead generation tactics specific to the interests, habits, and locations of graduate-specific audiences. For graduate campaigns, we also recommend a strong presence on LinkedIn, running Sponsored Content and InMail hand-in-hand to elevate results. It's important to show up on the world's largest professional network when seeking these highly qualified prospects.

Multi-touch attribution

We use Google Campaign Manager (formerly Doubleclick Campaign Manager) to inform cross-channel marketing attribution for our clients' digital campaigns. GCM has numerous attribution models including customizable models that will yield greater insights than just a last touch model.

Digital Strategies

DISPLAY ADS

We view outreach campaigns as a great way to build and maintain brand awareness for a school and/or specific program. We utilize a variety of targeting mediums depending on that school and program. We most frequently utilize behavioral

targeting, where we can build a persona of the audience that we're trying to target based on interests and topics of sites browsed, age, gender, etc. We view remarketing campaigns as a crucial tool for staying top-of-mind for prospective students who've already visited a site. Remarketing campaigns also tend to be great conversion drivers, because we can push an engaged prospect further down the funnel by prompting them to take the next step, such as scheduling a visit, requesting more information, or starting their application process. We use custom rules in the platforms to ensure the remarketing ads are only served to the most relevant audience. We run our outreach and remarketing display campaigns on a cost-per-click (CPC) model rather than a cost-per-impression (CPM) model because we believe our clients should only have to pay when a prospective student is interested enough to click through on the display ad and visit the site. We also think it's pertinent to display campaign success to apply category and site exclusions from the launch of the campaign to ensure we're only delivering ads on brand-safe sites.

SEARCH ADS

We believe paid search is a vital component of any holistic digital marketing strategy that focuses on inquiries/leads/conversions. When developing a paid search strategy, our team utilizes several different platforms and tools for keyword research. We use this research to develop not only a strategic, holistic approach to the keywords we bid on but also a robust list of negative keywords to proactively exclude from the launch of the campaign to avoid irrelevant searches. We build out a paid search strategy to ensure our keywords are highly aligned with the content of the ads and landing page. We initially develop three different ad variations per ad group according to Google's best practices, and then monitor performance of the ad copy throughout the duration of the campaign to optimize copy as needed. Our team also takes a very hands-on approach to the day-to-day management of paid search campaigns.

Specific to paid search, please share how you monitor and optimize search campaigns.

In initially developing a strategy, our team will utilize insights from you—as well as our own keyword and copy insights—to build out a strategy that fully aligns with paid search best practices, ensuring keywords are closely aligned with both the ad and landing page content to build out a minimum of three ad variations to test with the newest paid search ad formats. Once a campaign is live, our team actively monitors the performance of our paid search campaigns on a daily basis. We monitor the search terms report to weed out any irrelevant traffic and searches that are driving high-click volume/cost without generating conversion actions as well as to mine for new keywords that we could include as part of our strategy. We typically utilize smart bidding algorithms within our paid search campaigns to align with best practices, as these use the platforms' machine learning to better optimize keyword bids based on the search intent of each individual prospect. Our team keeps a close eye on all key metrics—including average cost per click, conversion volume, and cost per conversion—to ensure we're meeting the goals of your campaign, and so we can adjust the strategy as needed if we're not seeing strong performance with KPIs. We also analyze paid search campaigns in terms of engagement by geography, device, gender, age, income, previous engagement with the site, and more, then use the information gathered to further optimize campaigns. In addition to monitoring and optimizing based on keywords and audience, we also closely monitor the performance of our creative testing, pausing ads and campaign extensions that are underperforming. We then build out refreshed versions based on what's resonating best with our target audience.

Scenarios

BRAND RECOGNITION

Describe how you might handle a situation where brand recognition is high in some areas and low in others. What types of lead generation marketing would you implement?

When brand recognition is a main priority, we recommend running a wide variety of branding tactics on several platforms in both types of markets—the difference will be in the messaging we serve to the areas where recognition is high versus the areas where it's low. In terms of tactics, we recommend running Display Outreach, Facebook/Instagram Behavioral, Mobile Footprinting, PPC, YouTube, Spotify, and Snapchat. We've found with other clients these tactics work the best in

furthering branding and awareness and reaching new users in target audiences who would be interested in a school and/or a specific program. In terms of messaging for markets where recognition is high, the goal is to reinforce a school's brand. Thus, the messaging we serve in those markets would highlight the main value propositions and key well-known attractions of a school that are already known in these areas. For areas where recognition is low, the main goal is to get the school's name out there to users in the target audience. This would require messaging to be high level to establish branding and awareness of a school in general within these markets.

ONLINE PROGRAMS VS. IN-PERSON PROGRAMS

As our educational programs branch into more online opportunities, how do you envision advertising becoming distinct among audiences who prefer online and in-person education?

We work with many client partners who offer both in-person education as well as online options (often for the same program). We find there are distinct differences in those who are looking for an online degree option versus a full-time, on-campus option, such as age, stage of career, and stage of personal lives, just to name a few. We work with our partners to identify these differences within their own unique audiences and programs to target each population accordingly. Additionally, we can actively target for on-campus vs. online programs on platforms such as paid search, where prospective students may be seeking information on a specific type of educational format.

COMPETITORS/CONFIDENTIALITY

Do you currently work with peer schools and how do you address confidentiality?

The confidentiality and security of our clients are pivotal to Carnegie. Due to the nature of digital marketing and the abundance of inventory, conflicts of interest are *not* an issue. We have experience working with peer institutions, and we take steps to ensure our clients' satisfaction and security, in terms of both the in-house teams they work with and their marketing campaign execution. With multiple individual in-house Digital teams, we have the flexibility needed to align the appropriate team to each institution we serve to avoid any direct conflicts of interest.

Alternatively formatted answer

We have experience working with peer institutions and direct competitors, and we take extreme measures to protect our clients both in terms of the internal Digital staff members they work with as well as their marketing campaign execution and data security. We have never—and will never—share any data between institutions. All the work we do is kept in strict confidence, and any data sharing is strictly between our team and the university client directly. As an added measure of care and confidentiality, we never assign the same team or team members to work on competing clients. When you work with Carnegie, you can rest assured you'll gain overall industry expertise from our staff while data always remains confidential. Your confidentiality, security, and trust are of the utmost importance to us.

Campaign Management

OPTIMIZATION/AI/MACHINE LEARNING

Before tracking or optimizing any campaign, we ensure our team and yours are on the same page about high-level goals and individual campaign-level goals. On a campaign-level basis, goals are set so we can identify what we want to optimize towards: impressions, clicks, video plays, conversions, etc.

Assuming those goals are in place, we utilize a proprietary built system connected to each ad account through API integration to track which campaigns are pacing to spend in full, overspend, or fall short of the budget spend. Campaign pacing reports are pulled at least twice per week, and platform budgets are adjusted accordingly to help campaigns get back to their intended spend levels.

We also use this system to ensure quality assurance checks are taking place weekly and to note any optimizations that were made to campaigns, although the optimizations are made in the ad platforms themselves. Typically, this process

involves a senior level digital strategist analyzing performance and making more tactical optimizations directly. Examples include increasing keyword bids, changing bid strategies, adjusting audiences, testing new audiences, shifting budget, etc. More strategic optimizations, such as recommending new geos to target or geos or channels to pull out of, are recorded and sent to your team for approval. For some campaign types/ad platforms, we do utilize machine learning bidding strategies such as Maximize Conversions in Google Ads or a Conversion Campaign Objective in Facebook; again, the bid strategy chosen depends on the campaign goal.

ACCOUNT ARCHITECTURE

When developing campaigns, we group similar keywords together, those that target similar audience goals, demographics, and intentions. We then further segment keywords into ad groups where we further refine our audience targeting by creating custom bidding/budget strategies, segmenting keywords by match type, and testing multiple variations of ad text messaging and landing pages. Ongoing analysis, testing, and optimizations will ensure that each campaign is only reaching the most targeted, qualified audience while generating leads at the lowest cost possible.

How do you know if/when a campaign should be discontinued based on performance?

Our digital specialists are in the platforms daily monitoring performance data and proactively making optimizations and adjustments based on this data. We prefer to have 8–12 weeks of campaign data before making any major changes. This time frame allows the platforms to learn the audience and allows us to see trends. We also will always try to make campaign optimizations to improve performance before discontinuing a campaign. If we do ultimately learn a particular platform isn't proving effective for a given campaign, we will identify other opportunities to promote the campaign on a different platform.

Some of the key data points we monitor to determine if a campaign should be paused includes cost per click metrics, conversions/leads, and cost per conversion/lead. Advertising rates are driven by competition. If competitors are driving CPCs to unsustainable averages, we reevaluate the keywords we're bidding on; and if replacement keywords aren't relevant to your campaign, we may be forced to discontinue the campaign. This thought process is also applied to conversion numbers. If the number of conversions driven by the campaign isn't driving a return on your investment, we will look to make strategic changes. If we're finding one platform is far outperforming another, we may recommend discontinuing the poor performing campaign and shifting budget to the top performing platform.

Digital Tactic Descriptions

DISPLAY RETARGETING

Display Retargeting focuses on those who have engaged with you or visited your website. These are more qualified leads, and the goal is to drive prospective students to register for an open house or to apply to one of the primary programs.

GMAIL

Through Gmail, we can deliver interactive ads to prospective students.

SEO TECHNICAL SITE AUDIT + ONGOING CONTENT OPTIMIZATION

This will drive prospective students to your website and ensure a positive user experience when they get there. An organic appearance on search engines will complement your paid efforts, helping prospective students connect with you and your programs.

IP TARGETING

Not all IP Targeting is created equal. Carnegie was the first to provide this targeting technology for higher education and continues to lead the industry in performance and match rate—almost 90%. We run hundreds of IP Targeting campaigns annually and regularly A/B test.

GEOFENCING/MOBILE LOCATION TARGETING

Through our Geofencing/Mobile Location Targeting capabilities, we can capture mobile devices at specific locations such as feeder high schools or community colleges and serve ads while those devices are within the location or after they've left. We can expand that advertising reach with our Mobile Footprints service once the device travels home and accesses Wi-Fi. Mobile Footprints combines the power of Geofencing, Mobile Location Targeting, and IP Targeting and enables delivery to any device in the household, putting your message not only in front of students but any decision-making stakeholders living under the same roof.

AUDIENCE SELECT

Audience Select is the most precise Display advertising for higher education—and it's a Sole Source Service only available through Carnegie. We deliver unprecedented targeting by leveraging academic achievement—oriented data from our proprietary CollegeXpress database, layered with 700 different data points including geography, ethnicity, and household income. This technology allows you to pinpoint your target audiences then tailor Display messaging to the students' households that are the best fit for your institution. No other digital strategy in undergraduate recruitment marketing combines our academic achievement intelligence and household demographic data to hone in on audiences with this level of precision. Great for brand awareness, new market expansion, and top-of-funnel messaging, Audience Select offers a turnkey Online Display approach that delivers immediate impact.

GOOGLE ANALYTICS

While our robust monthly advertising reports deliver exceptional data regarding the delivery of your campaigns, Google Analytics provides a deeper understanding of the impact those campaigns have on your visitor traffic and behavior. Carnegie's Advanced Analytics Consultation will help maximize your Google Analytics tracking implementation for extended dashboard capabilities and insights. Our team will take a deep dive into Google Analytics to align tracking with primary goals for marketing campaigns and resolve data issues through training or technical implementations.

Key Performance Indicators / Return on Investment

How do you use metrics and analytics to measure effectiveness; establish and adhere to specific goals; track and report results and measure ROI? What analytic tools do you rely on to provide meaningful and actionable data?

Data is at the center of every Carnegie 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.

Provide an example of how your agency's approach to media planning and buying has benefited a client's ability to engage a large proportion of their target audience with minimal advertising dollars.

For a client looking to grow awareness among its target audience, we make sure we're engaging the largest proportion of their audience by buying media using a dynamic CPM model (when available), which typically results in greater reach and more impressions than if we used a set CPM. Additionally, we've often shifted budget away from traditional mediums like radio and TV to digital alternatives like Connected TV and Spotify/Pandora, which offer greater audience targeting capabilities, ensuring we're utilizing advertising dollars on specific target audiences. However, not every campaign is about ensuring we reach the largest proportion of the target audience possible. For campaigns where conversions are the goal, for example, we would recommend a different set of strategies than we would for an awareness campaign.

Software Integrations

SALESFORCE

- Several Carnegie clients use Salesforce as a CRM. Salesforce offers an integration with Unbounce, so if we build landing pages for a client, leads can be automatically integrated with the Salesforce CRM rather than being emailed or flowed into a Google Sheet. Facebook offers a direct integration with Salesforce, but we can also set up integrations with both Facebook and LinkedIn using Zapier, so any lead generation strategies could flow directly into Salesforce to help automate lead flow. Regardless of your CRM, we will work with your University to ensure we're generating and connecting you with quality leads in a timely manner.
- For universities utilizing Salesforce, Carnegie provides direct integration of leads from landing page RFI forms if we've built the landing pages for the client. Utilizing an automation tool, Zapier, we also do the same for hundreds of campaigns running lead generation advertising on social media platforms like Facebook, Instagram, and LinkedIn. Our staff members are completely trained experts on setting up these integrations at the beginning of your campaign. Additionally, for clients utilizing Carnegie Clarity™—our proprietary website personalization and attribution tool—we can provide direct integration into Salesforce for web attribution and custom website interactions on a 1:1 identified user basis. Regardless of your CRM, we will work with your University to ensure we're generating and connecting you with quality leads in a timely manner.

SLATE

We work with many clients that utilize a wide range of CRM solutions, with the most common being Slate, Salesforce/TargetX, Ellucian Recruit, and Hubspot. Our team works hand in hand with our client partners to integrate our digital lead generation efforts and landing pages directly to the CRM whenever possible, and we can assist with providing directions and integration guides for the most frequently used CRMs.

Media Brief

- *Provide a sample media brief.*
Please see [hyperlink](#).

Advertising/Media Buying

Digital Advertising Networks

Has access to large digital advertising networks that includes a variety of inventory types across college-related apps/websites and apps/websites favored by SCC's target markets and has outreach and retargeting capabilities within these networks.

Through our work on Google Ads and DV360, we have access to a large inventory of high-quality websites and applications. Carnegie has both Outreach and Retargeting capabilities within these networks where we are able to behaviorally target new users on websites and apps they're most likely to visit via third-party data, custom audiences, and interests as well as Retarget them as a second touchpoint on websites and apps they're visiting. With Outreach and Retargeting, we're able to push several different ad types to target audiences, including static image ads, Responsive Display Ads, and video ads. Additionally, Carnegie utilizes blacklists and negative keyword lists to ensure brand safety.

Integration Of Digital And Traditional Media

Expertise in higher ed marketing, specifically how digital marketing integrates with traditional forms of marketing and recruitment.

As strategists first—and specifically, strategists who have first-hand experience leading admission and marketing teams in higher education—we make sure we understand your goals and unique challenges before we dive into marketing execution. The integration between digital marketing and traditional marketing looks different for each of our clients because each of them have a different set of goals.

For one of our clients, we helped them own a piece of their personality they were too timid to claim in the past. In order to spread awareness about their distinct positioning in the market (and ultimately grow their undergraduate recruitment), we transformed the visual look and feel as well as the messaging within their entire recruitment communications flow. This included a custom photo shoot, reimagined print pieces, redesigned landing pages, rewritten emails, a new look and feel for visit day presentations, a brand new acceptance package, and more.

We even helped to transform the physical space in the admission office. Simultaneously, we carried the same new visual look and messaging into their digital advertising and inbound marketing strategy. At every step of the way, we've measured KPIs, created benchmark analyses, and continually optimized the digital tactics and ad messaging based on performance.

For another client, we helped launch undergraduate and graduate online programs through an extensive traditional and digital media campaign. Following research and strategy that was focused on the online offerings, we developed campaign concepts rooted in the personality of the institution. We built brand familiarity by being meticulously consistent across traditional and digital advertising. While billboard messaging tends to be more general and digital can be much more specific, we ensured that the messaging and appearance were cohesive across digital and traditional media. Simultaneously, we launched digital advertising in the same target geographies where traditional billboards are located to build brand awareness. We also migrated some traditional TV and radio media buys to their digital counterparts by leveraging hyper-targeted advertising through streaming platforms like Spotify, Pandora, and Connected TV allowing for better and more measurable action.

For all marketing initiatives, we look closely at your target markets and geographies to outline the best blend of digital and traditional media based on your goals and budget.

Local Media Management

If desired by the client, Carnegie can partner with the institution to effectively purchase and manage direct media buys such as billboards, print, local broadcast, etc. We can negotiate optimal placement and contract, oversee creative

management to ensure continuity with digital efforts, and effectively track and measure the impact per channel, complete with recommendations for future placement.

Media Spend

Carnegie's 2020 media spend, including Display advertising, PPC, and social media advertising, exceeded \$20 million.

Advertising/Media buying with an emphasis on strategies and tactics used to reach the target demographic. This should also include evaluation metrics.

Carnegie has vast experience with higher education clients, serving over 600 clients annually that range from traditional four-year institutions and graduate schools to community colleges and technical schools. 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.

If the goal is to reach a traditional undergraduate student, we may use a combination of Facebook, Instagram, Snapchat, and Audience Select; whereas for a career advancement prospect, we would likely include LinkedIn, where we can target professionals based on job function, seniority, and title. All our campaigns are evaluated on an ongoing basis by our campaign managers and optimized to the targeting and platforms that are performing best. We will not only evaluate clicks and engagement but also conversion and lead delivery.

Each goal has a Key Performance Indicator (KPI) tied to it that we measure against, such as number of form completions, percentage lift in traffic, open house registrations, video completions, etc. The KPIs are tracked and reported on monthly and can be seen in the live dashboard so we can consistently measure the results of each platform and tactic.

Give us examples of your experience with performance-based, nimble and evolving mixed media annual plans

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 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.

[Benefits of working with one digital agency partner](#)

Brand Strategy, Research, and Expression

Brand Strategy: Overview

Your brand is your reputation; it's who "they" say you are. Understanding who you are—your brand's psychology—is the foundational thesis of our work. Over the past decade, we've developed and refined a proprietary, peer-reviewed methodology for strategic master positioning and storytelling. We've leveraged this approach at institutions, organizations, destinations, and programs across the country, delivering transformative brand strategy recommendations and execution.

Research Approach

Carnegie is dedicated to establishing research with solid methodological foundations that also serves a purpose for strategic action. As a result, our measures are rigorously tested and constantly evolving to be as useful for our clients as possible. When doing research that looks at changes over time from work of other vendors, using replicated measures is one option, however, if those measures are outdated or inaccurate we prefer comparable replacements or fully new measures to ensure the best data quality possible. We will work with the team at Chapman University to identify the most important insights used from previous studies to better carry over the most critical portions of those surveys while still offering improvements throughout to increase the research salience today.

General Approach

Wholly originated and evolved since our inception, Carnegie has engineered a unique psychometric communications model using our proprietary personality foundation and data-driven systems. We apply a custom approach and proprietary methods to all our research, strategy, creative, digital, lead generation, and team-building services to create clarity and connection inside and outside your organization. And we continuously invent and refine our methods, leading the way for your success. Additionally, Carnegie works primarily within higher education. We understand the nuances, peculiarities, and internal politics of higher education and how to best serve an institution. Please see attached PDF for detailed approach and methodology specific to your institution.

End-to-End Portfolio

One of the things we are most proud of is the breadth and depth of our portfolio of services. Carnegie exists as it does today because of the merging of two firms who led the industry respectively in reputation strategy and marketing execution. Our portfolio allows us to partner with clients as their sole marketing provider. Our in-house staff of more than 200 makes up dedicated teams for strategy, research, creative, digital and media strategy, and account management. United under one roof and leadership team, we work together seamlessly and pull resources from each team to address your specific goals.

1. What types of product examples will be included with brand identity concepts? print, digital, photography?

The client will be given a choice of canvas samples, generally choosing from the following list: Viewbook spreads, magazine ad, poster, postcard, digital ad, billboard, landing page. These samples will showcase how the concept can extend, visually and verbally (through narrative, design graphics, typography and imagery), across various communication types and primary audiences. These sample canvases serve to cast a vision for overall expression.

2. Will there be three distinct and varied looks for each concept provided?

Yes, each concept will present a distinct big idea story and visual construct that is authentic to you and emotive in expression. Our team will converse regularly with you throughout the

ideation and drafting process to arrive at these three strong and varied concepts, ensuring each resonates with your strategic goals.

3. Will there be concept testing for each to determine a favorite among those polled?

Concept testing is not currently included in the scope of work but is available with scope options listed below. We offer both qualitative testing among key UCO stakeholders as well as general market surveys. Both forms of testing gather additional data points as to what concept(s) are most resonate with audiences. The qual testing yields insights as to which concepts may be stakeholder favorites. The quant testing calls out any aspects of the concepts that may be concerning or unappealing to the general market, at times showing one concept to be more preferred over another.

Creative Testing (General Market): Creative assessment for new campaign concepts to determine acceptance of the concepts, personality of designs, and likelihood of behavior change. Data contrasted by demographics and summarized in a report with descriptive-level statistics and qualitative theming and strategy. Two campaign layouts tested; local market: 400 completes (applicable research sample cost of \$2,400 included in total pricing): \$13,500

Creative Testing (Qualitative): Qualitative creative assessment, determining stakeholder perception, reaction to, and acceptance of the campaign options. Data will be summarized in a report with qualitative theming, summaries, and insights. 1, 2-hr virtual digital qualitative session and subsequent qual report; up to 30 attendees: \$5,000

4. After a final concept is picked, what are the deliverables?

The campaign concepts are revealed and delivered in a presentation deck, showcasing for each concept the big idea story, design and messaging rationale, and the canvas samples. The client is invited to choose a concept, with up to two revision rounds on that chosen concept. Once the concept gains final approved, we will send final files for that concept, inclusive of the presentation deck and it's elements. That concludes the deliverables for this product. Carnegie is available to apply the chosen concept to actual print or media products at the additional cost of those products.

For samples of Carnegie Campaign Concept sample canvases as well as additional creative deliverables, please [click here](#).

Please outline in detail your full-funnel capacity and any gaps that you may have or inability to deliver an end-to-end marketing strategy.

Carnegie is a full-service partner in marketing innovation. By leveraging our full suite of higher education marketing solutions, your University marketing strategy will be far more than the sum of its parts—the insights and strategic direction we glean about your external perception, key differentiators, institutional attractants, competitive environment, and more shape our recommendations for marketing and recruitment. Our suite of offerings fall within six umbrellas: integrated research, reputation strategy, signature creative, digital marketing, lead generation, and team dynamics.

The breadth of our service offerings is matched equally by their depth. The in-house capabilities we've developed and expertise we've curated is among our chief areas of pride. This allows us to not only lead the way in establishing industry best practices but create customized solutions to client partner challenges along the way.

The power of a partnership with Carnegie lies in the seamless integration of our full-funnel solutions. While we don't have gaps between our sectors of service offerings, we do have several established limits. For example, we produce

almost any print, digital, and multimedia creative deliverable, but we don't facilitate print production—we hand over packaged print-ready files instead. We also don't mail collateral on behalf of our clients, nor do we send mass emails.

Describe the firm's recent experience with serving as a sole source provider of all related services – strategy, creative, implementation, and ongoing evaluation and able to provide useable data feedback to clients to improve ROI.

We have multiple clients who leverage our services across our portfolio and partner with Carnegie as their sole marketing provider. This partnership equips us to fully understand their brand, message, personality, and goals and enables us to set them up for success through fully certified marketing execution.

From our proprietary brand personality research which provides you with objective data about your institution to our best-in class digital marketing strategy and execution, we're committed to providing useable and strategic feedback. With an in-house staff of more than 140, with a dedicated reputation strategy, creative, digital and media strategy, and account management team, we pull resources from each to address the specific goals and challenges our clients face.

Account Management

We begin every project by meeting with your core team, reviewing the full scope of the project, and discussing immediate next steps. We dive deep into any relevant research previously conducted and analyze strategic plans that might already be in place. We confirm goals, audiences, and priorities and then walk through our processes and systems for information access and sharing. A shared file folder is provided so you have ongoing access to all research, assets, and files for review. Driven by the full scope of our work together, recurring meetings and/or milestone presentations are scheduled, creating a road map for our work together.

Each account is assigned a dedicated account team. Your primary 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. Additionally, a senior strategist, account coordinator, research analyst, art director, and digital director will all be dedicated to your project. Additional subject matter experts are also assigned to specific projects so you'll always receive support from the industry's best minds.

While your account manager facilitates the tactical production of work, the strategists and specialists on your account team are always available for strategic consultation—prompting you to think about our work together through different lenses. Your senior strategist keeps their pulse on the political considerations at play (internal and external), big-picture goals, and strategic integration of all communications channels. Your research analyst ensures data integrity is maintained at the highest levels and results are easy to understand and act upon. Your art director safeguards the nuances of your brand story, guiding our writers and designers in expressing your unique personality. Your digital director maintains an ever-watchful eye on all the layers of your campaign execution and constantly refines and optimizes to match real-time engagement. As any project or campaign concludes, your account team circles back to the basics: What did we learn about your goals along the way? Which KPIs performed better than others? How did we adjust our approach along the way to address new challenges and unexpected events? What do next steps look like for maintaining success? What level of support is desired in those next steps? While our goal is to become a long-term strategic partner, that looks different for every client. For some, it means a campaign is "always on" in one form or another. For others, our support is seasonal or in key moments of high-stakes need. In all scenarios, we remain agile and adaptable.

How do you manage workflow and competing deadlines?

We utilize a project management software, called Asana, that was selected specifically for its ability to facilitate multi-phase projects, both the high-level phased planning and the minute management of tasks and subtasks. Your account manager captains the creation and management of all timelines and each member of your account team is assigned to specific tasks and subtasks. Progress of both tasks and phases are reported weekly and monitored by company leadership. As multiple projects with similar timelines are activated, supplementary team members in each discipline are added to the account team. At every step of the way, your account manager will be supplying you with specific next steps and associated dates so you're well aware of what needs to happen to keep the projects moving

smoothly and what you can expect of us. Due to the depth and breadth of our portfolio of services, we've invested the time needed to develop efficient processes, process documentation, and project communication best practices so each of our clients benefit from partnering with a single-source provider as well as an agile, potent team.

How does the handoff from creative to distribution work?

For any distribution we are managing on behalf of a client, our internal teams work in tandem for a seamless handoff from creative to digital implementation or out-of-home vendor. For clients who are facilitating their own distribution (or using another vendor for distribution), we deliver source files for all final, approved creative work.

Describe any experience managing partnerships of significant scale.

Carnegie regularly works with clients of significant scale—in terms of number of stakeholders, prestigious profiles, and highly complex organizational structures. It's not uncommon for our public research university clients to have 30,000+ current students and living alumni networks of 500,000+. Beyond "internal" stakeholders, these universities are also accountable to the statewide community and elected officials. We recognize the intense scrutiny these clients are under and are adept at stewarding projects in such a way that keeps stakeholders of all kinds informed and engaged.

While many of our higher education clients seek to increase the prestige of their reputation profiles, a handful of our clients are consistently in the top tier of nationwide rankings. The high expectations we set for ourselves apply to client accounts of all sizes and all profile-awareness levels. We can be as discreet as our client partners require and are discerning and tactful in all cases. Each of our client partners have their own unique challenges around managing sub-brand entities and co-branded partnerships. Our processes were designed to succeed in decentralized organizations, where there are many voices (and many opinions) and yet a singular solution needed.

Research

Offeror should be able to demonstrate experience producing research via focus groups, surveys, and other qualitative and quantitative instruments with diverse constituents; please provide a detailed description of research methodology and data validity. Samples of data analysis reports and/or transcripts are preferred but not required; redacted materials will be accepted.

Our proprietary research and strategy methodology was built specifically for decentralized institutions like colleges and universities. We recognize the importance of involving many voices and giving a degree of weight to all of them while at the same time having a clear process by which we arrive at one strategy and solution with which to move forward. While we pride ourselves on being data driven, the environment in which we work is not a sterile one—our methodology provides structure while also embracing the nuances that every institution brings to the table. In fact, our first-of-its-kind psychometric marketing model and research processes have yielded two peer-reviewed conference publications at the annual conference and international open competition of the Association for Education in Journalism and Mass Communication.

Each branding remodel project we facilitate is supported by a three-pronged foundational strategy: 1) Understand who internal stakeholders say you are, 2) Learn who the external market perceives you to be, and 3) Discover how you can tell your authentic story in a competitive landscape and stand out for all the right reasons. All of these facets of brand positioning work together to influence human connection and emotional resonance. And the mixed methods approach we utilize is critical for establishing research credibility on which to base future brand strategy decisions.

To capture the voice of internal stakeholders (students, faculty, staff, administration, nearby alum), our team facilitates two-hour live workshops to collect quantitative and qualitative data. Eight separate frameworks are used, allowing us to define institutional personality and develop personality-specific language, backed by evidentiary examples. An entirely virtual survey collects quantitative data for four of those same frameworks from voices that aren't able to be present in the live workshops. The research works as a living data model, with the first set of workshops collecting hard data that will be used to set up the second set of workshops. That means solutions and information gathered are specific to every institution we work with.

Simultaneously, an external perception survey is launched to the unbiased market in the key geographies in which your institution is well known. Nielsen designated market area (DMA) boundaries are used as a standard, and a minimum of 300 survey completes are collected from each DMA. Participants must be familiar with the institution in order to answer the survey, but they must not be affiliated with the institution in any way or affiliated with a major rival institution. We operate at a 99% confidence level in all survey work and include a maximum confidence interval in the reported results.

Finally, a competitive audit demonstrates how both you and your competitors portray yourself in the market. This analysis reveals any differences that may exist between who you say you are through our internal workshops versus how you are perceived in the market. Summary opportunity mapping then shows where you stand in relation to your competitors in tone, style, communications quality, and personality. We use these aggregate maps to clarify how to tell your authentic story (your true personality) but focus your messaging through the pieces of your personality that are distinct compared to your competitors—where you don't overlap.

Apart from these three foundational research components of our master positioning work, our research team offers established methods for measuring current markets, new markets, digital perception, program potential, prospective student needs, audience demographics and psychographics (personas), creative traction, and marketing structure and resourcing, in addition to custom work designed following specific client needs and requests. These various outcomes require multi-method approaches to research. The Carnegie Research team has decades of combined experience in academic-style research, with specialties in qualitative analysis, thematic analysis of focus groups, factorial modeling, regression analysis, and survey structure and design.

Research-driven Brand Strategy

The offeror will describe their process and/or provide samples of their work in developing strategic branding frameworks, which includes development of target audiences, brand positioning, brand promise, personality attributes, overarching creative concept direction and communications strategy. Additional information regarding concept testing and validation is preferred.

Our brand positioning work is centered on three key data points:

1. Who you say you are (as defined by your internal stakeholders)
2. Who the unbiased market (the proverbial “they”) perceives you to be
3. What positions your competitors are claiming in the marketplace

At the center of those data points is your positioning strategy: what personality can you authentically claim that is also competitively advantageous? And how do you communicate that personality in light of how you are currently perceived? Our master positioning recommendations provide clear direction as to how your institution utilizes the opportunities in front of it and how your message platform drives a compelling brand story across all channels.

Our master positioning recommendations and messaging platform is rooted first in who you are. Once you know who you are, then we can tackle specific messages to defined audiences. Audience personas are distinct at every institution and, in our world, are composed of demographics and psychographics. To uncover student personas, we begin by clustering the demographics of your institution's current audience and then our team meets your students. In highly interactive sessions, our strategists and research analysts learn in-depth personality information directly from them. This is followed by an online survey of the student body, connecting known demographic clusters to personality profiles. Using this wealth of qualitative and quantitative data, we create student persona profiles, which we call Darts. Beyond typical persona descriptions that only offer lifestyle and demographic insights, our profiles include motivators, archetypal personality depth, and a core messaging attractant, which acts as a key to unlocking storytelling for each Dart.

Armed with a clear understanding of who you are, who your students are, and your market's perception of your brand, we move into campaign concepting to ensure a compelling expression of your brand to your market right out of the gate. The goal is to raise awareness, drive the right story, and grow reputation through beautiful, compelling, and authentic creative—an effort which leads to real wins in enrollment, brand recognition, and growth for our partner institutions.

Our approach to concept creation ensures:

What is authentic: Your concepts are rooted in your unique personality which tells the true story of who you are today and who you are becoming. Each concept draws upon elements of your story in deep and powerful ways with the goal of increasing market awareness and engagement.

What is strategic: Your concepts are carefully constructed to claim key marketing opportunities, as informed by the research and strategy results from our consensus-driven research. Concepts respond to key marketing opportunities as revealed through your external perception research and competitive analysis.

What connects: Your concepts take into account your primary audiences, ensuring we're sending the right message to the right students for maximal attraction, engagement, and impact.

Creative concepts can be tested from prospective audiences in the market to ensure acceptability, marketability, behavior change likelihood, and perceived personality. By leveraging the power of outside voices, we ensure the creative has avoided major pitfalls with those who will be receiving the message.

Describe how the supplier has leveraged market research and competitive analysis to develop truly distinctive brands that resonate with defined target audiences.

Our master positioning work is supported by a three-pronged strategy: 1) Understand who internal stakeholders say you are, 2) Learn who the external market perceives you to be, and 3) Discover how you can tell your authentic story in a competitive landscape and stand out for all the right reasons. All of these facets of brand positioning work together to influence human connection and emotional resonance.

It's important that you first understand who your institution is authentically (as defined by your stakeholders) so you're telling a story that resonates with the right students—those who will be successful at your institution. If a false narrative is perpetuated, expectations will go unmet, misunderstanding continues, and student retention will drop. It's on that foundation that we begin our work: Sincere human connection drives the right communication.

A market perception study then allows us to understand whether the market perceives you the same way you perceive yourself or differently. This data serves to reinforce or challenge the data resulting from the workshops we conduct with internal stakeholders. Understanding your perceived reputation is critical before planning your externally facing marketing strategy.

Finally, a competitive audit demonstrates how both you and your competitors portray yourself in the market. This analysis reveals any differences that may exist between who you say you are through our internal workshops versus how you are perceived in the market. Summary opportunity mapping then shows where you stand in relation to your competitors in tone, style, communications quality, and personality. We use these aggregate maps to clarify how to tell your authentic story (your true personality) but focus your messaging through the pieces of your personality that are distinct compared to your competitors—where you don't overlap.

You'll note that our recommendations surrounding master positioning and messaging is rooted first in who you are. Once you know who you are, then we can tackle specific messages to defined audiences. We train your stakeholders on how to speak to any audience using language that's considered "on personality." To go further, we offer a student personas product in which we conduct student-only workshops and identify their reasons for attending your institution, demographic profiles, and psychographic motivations. On-brand messaging to each of the identified student profiles is also delivered.

Detail research, including consumer sentiment work, you have completed in order to determine brand equity.

Brand research, especially focused on the perception of audiences, is at the core of our process. Knowing the "who" of a company requires an understanding of what the consumer knows and thinks about an institution or program. Carnegie offers full perceptual awareness campaigns through research that details public familiarity, reputation, and personality, which is broken out by region or Nielsen DMA geography. This perception research has been used successfully for clients in a range of fields and is customized to reach the correct audiences with a consistently tested and refined question set. With more than 100 perception studies completed for higher education clients, including a dozen for specific online programs, Carnegie has both an established method and longstanding experience with brand equity.

Brand Architecture Strategy

Highlight the differences in your approaches between helping organizations build a house of brands versus a branded house approach to brand relationships and architecture.

Data will always guide our brand architecture recommendations. If we're brought in to answer the question of whether you should be a house of brands or a branded house, we conduct brand personality research, external perception research, and competitive audit research to understand whether the personalities of your brands align and if it would be smart for your brands to go to market messaging the same personality (given the competitive landscape of each of your brands).

When we're brought in after the brand architecture decisions have been made, we seek to understand your desired relationships of your brands and how personality-driven communication can help provide clarity to that structure. For example, with a house of brands, we want to know how each brand is distinct and how (if at all) they share overlapping personality traits. We helped a recent client structure themselves in this way. In that instance, we designed a messaging strategy for the system-level brand that complements differentiated messaging and visual platforms for each of the sub-brands. Audiences for each brand are vastly different and, thus, our recommendations for communicating the brand personalities of each brand were suited for each unique audience.

In the branded house scenario, we ensure a singular visual and verbal communications platform is adopted across all brands but emphasize on-the-ground training with each of the institution's communications units to empower stakeholders. In these training engagements, our Senior Strategists help participants understand how to apply the platform in any day-to-day activity and how the flexibility of the messaging platform encourages individuals to personalize their communications while remaining true to the institutional brand.

Brand Launch

Describe the brand roll-out approach you use with similar clients.

Our ideal approach begins with consensus-building discovery involving the entire campus community. We run a series of workshops in which participants speak to the personality and messaging of the institution at an enterprise level. Following the completion of the research synthesis and master positioning recommendations, we travel back to campus and invite all online stakeholders to attend live research reveal events and message trainings to discover what the data tells us, what recommendations are being made, and how to use this information to communicate about the institution authentically and consistently. A "train the trainer" approach is taken for all of our training events so the work doesn't end with us. We want to ensure your teams are empowered to continue this work long after we've left campus.

If new names and/or new logos are needed, we recommend that the research reveal events and message trainings coordinate with the announcement of one or both of these. Understanding the research and big-picture strategy behind major changes such as these helps to build buy-in. Additionally, the launch of a coordinated marketing campaign is powerful at these moments.

Brand Management

Our personality solutions and messaging platforms will last a decade or more. We don't simply provide enough fodder for a one- or two-year campaign run. (We do offer campaign concepts separately but are careful not to confuse the two.) Long-term brand management requires an authentic, agile, and all-encompassing platform that's easily accessible for the broader campus community. The archetype system in which we deliver our personality solutions is color based. At a high level, "Red" represents "cheerful and enthusiastic" and "Maroon" represents "grit and determination." This easy-to-reference color method is used in our training exercises and provides a coded system for both communicating ideas and removing a large amount of subjectivity from the creative development process.

We engage with our client partners in all levels of continued brand management, from producing on-personality photo

and video assets (or training their in-house staff on how to do this) to rewriting website content to tell a brand story to facilitating multi-day creative blitz experiences, which allows client partner teams to travel off-site and spend a significant amount of time fine tuning their personality-driven storytelling skills.

The offeror will describe their process and/or provide samples of their work in developing brand guides, asset libraries, brand activations, and style guides, which includes development of processes and tools to effectively launch the brand platform and manage new visual and written materials indefinitely. Additional information regarding activation planning and media placement is preferred.

Through our original research-based, consensus-driven approach, we arrive at a cohesive brand strategy and message platform designed to align communications and advance market position for your institution. But we don't stop there—not only do we equip the institution's stakeholders with clear positioning direction and language, we empower staff and faculty through interactive training engagements that are designed with everyday communications activities in mind. Using our message laddering techniques, your teams learn how to proactively apply the brand platform to maximize enrollment, perpetuate consistent brand language, elevate institutional reputation, drive fundraising, and support your strategic plan priorities (just to name a few). Getting the masses speaking the same language is the first step to ensuring successful long-term brand management.

Without a tangible document to show the way, it's easy for brand management to get out of hand. Brand standards are the solution. This consolidated master document is your guide for managing the brand moving forward, detailing color palette, typography, logo use, design application, imagery style, and message expression. The guidance provided protects the brand from unintentional shifts over time and allows more participation in the creation of on-brand materials.

Through the archetypal visual strategy established in your brand standards, we deliver on-personality photo and video assets for your library and develop signature print and digital creative from which to base the rest of your communications. This same creative work carries into the execution of your media campaigns. We deliver not only all the assets needed for placement but also the media strategy that ensures your messages are finding your target audiences and moving them to action. We take a holistic and creative approach to campaign management, providing the flexibility and customized approach necessary for the best possible outcomes. With cross-channel expertise and in-house experts, we're not limited to a particular product, channel, or capability—we let your goals 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.

Like our brand strategy work, data is at the center of every Carnegie marketing strategy. Our team of media strategists partner with you to translate campaign objectives into the right KPI metrics and goals. We then select 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—Tableau, Slemma, and Google Data Studio. 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.

Audience Segmentation

Student personas are distinct at every institution and, in our world, are comprised of demographics and psychographics. After clustering the demographics of your institution's current audience, our team meets your students. In highly interactive sessions, our strategists and research analysts learn in-depth personality information directly from students. This is followed by an online survey of the student body, connecting known demographic clusters to personality profiles. Using this wealth of qualitative and quantitative data, we create student persona profiles, which we call Darts. Beyond typical persona descriptions that only offer lifestyle and demographics insights, our profiles include motivators, archetypal personality depth, and a core messaging attractant, which acts as a key to unlocking storytelling for each Dart.

Consensus-building

How do you involve the campus community in brand research, development, and rollout?

From individual interviews to group workshops, our qualitative and quantitative research analysis reaches into every facet of your communications and addresses each stakeholder group and audience segment connected to your institution. With a focus on consensus-building discovery, we reach across a broad range of perspectives to uncover the many attributes that comprise your institution's complex personality and facilitate stakeholder conversations to synthesize and validate the big ideas that resonate.

All members of the campus community are invited to live workshops—the data collection moment that builds the foundation of our master positioning strategy. Anyone who was unable to attend in person can instead be invited to complete an online workshop so the data isn't limited to only the voices of on-campus stakeholders.

Your stakeholders are not the only ones included in the data collection and validation process, however. We invite anyone to attend live research reveal events and message training sessions to discover what the data tells us, what recommendations are being made, and how to use this information to communicate about the institution authentically and consistently. A "train the trainer" approach is taken for all of our training events so that the work doesn't end with us. We want to ensure that your teams are empowered to continue this work long after we've left campus. Furthermore, because of the depth and inclusiveness of our research, which operates at the "DNA" level of the institution, you can expect our solutions to have an immense shelf life that spans at least a decade, if not more.

How will your entity integrate feedback and information gathered from faculty, staff, administrators, and external stakeholders?

Our proprietary research and strategy methodology was built specifically for decentralized institutions like colleges and universities. We recognize the importance of involving many voices and giving a degree of weight to all of them while at the same time having a clear process by which we arrive at one strategy with which to move forward. While we pride ourselves on being data driven, the environment in which we work is not a sterile one—our methodology provides structure and also embraces the nuances every institution brings to the table. Specifically, we begin by conducting discovery interviews with a handful of key stakeholders with varying perspectives. These initial interviews provide our team with valuable historical, political, and social context before conducting research on campus. We alter the way we frame our work to the masses so that what we're saying aligns with the University's mission and reinforces the overall goals of this project.

Once we're on campus, we host staff, faculty, administration, students, alumni, and community members at a series of live interactive workshops—the data from which provides unparalleled clarity, direction, and language about who your institution is. These workshops utilize a mixed-methods research approach where we collect definitive quantitative data from a series of activities but also provide opportunities for qualitative dialogue around themes and ideas that arise. Two types of live workshops are facilitated: Each one includes seven to 10 different frameworks that build on each other and ask participants to validate data that's already been collected. While the frameworks are set, the input and data gathered in each one influences the next one and allows the participants to drive the end results. An online workshop is also issued to collect input from those unable to travel to campus for the live workshops.

After the positioning strategy is compiled, the project's primary sponsors will hear the results, insights, and recommendations first. Our timeline creates space for processing feedback and adjustments as needed without compromising the integrity of the collected data.

Creative

Explain how marketing research is integrated into your creative decision-making.

In conducting foundational reputation strategy research, we look for three key data points to inform our storytelling:

1. Who you say you are (as defined by your internal stakeholders)
2. Who the unbiased market (the proverbial "they") perceives you to be
3. What positions your competitors are claiming in the marketplace

At the center of those data points is your positioning strategy: what personality can you authentically claim that's also competitively advantageous? And how do you communicate that personality in light of how you are currently perceived? Our master positioning recommendations will provide clear direction as to how your institution utilizes the opportunities in front of it and how your message platform drives a compelling brand story across all channels.

Compelling creative is the vehicle by which you claim your position in the market. It needs to reflect your authentic brand story and make it clear what sets you apart. Our approach to creative work is a fusion of logic and feeling; it harnesses the power of human connection. We base all copy, design, and imagery decisions on your research-rooted brand story and positioning strategy. As we refine the conceptual work and execute across multiple channels, we use your authentic personality as the filter through which decisions are made. Add to that time-tested industry best practices—such as Search Engine Optimization or clear calls to action—and we've proven that we consistently deliver inspired content that compels audiences to take action.

Offeror will describe their creative process, how it is different from the competition, and why the Offeror thinks they are the best company for this project.

Our approach to creative goes far beyond making pretty things and hoping for the best. Long-term reputation gains and brand management require an authentic, agile, and all-encompassing platform that's easily accessible for the broader campus community. The master positioning strategies we build utilizes a proprietary, tested theory platform that serves as a guide for every step of execution. From stakeholder workshops to external perception research and the competitive audit, the Carnegie research process builds on the foundations of nine archetypes to create dynamic and iterative research capabilities. This archetype system is color based. At a high level, "Red" represents "cheerful and enthusiastic" and "Maroon" represents "grit and determination." This easy-to-reference color method is used in our training exercises and provides a coded system for both communicating ideas and removing a large amount of subjectivity from the creative development process.

It's with an institution's archetypes in mind that our designers, writers, producers, and directors produce world-class creative, from campaign concepts to visual identities and multimedia production. The output is not only beautiful but richly infused with an understanding of human personality that results from our consensus-driven research—all of which leads to real wins in enrollment, brand recognition, and growth for our partner institutions.

The offeror will describe their process and/or provide samples of their work in creative concepts and identity programs, which includes implementation of research findings into a visual identity as well as testing creative concepts like color, design elements, photography themes, etc. Additional information regarding concept testing and validation is preferred. Give special attention to experience with growing institutional enrollment and increasing institutional brand recognition, importance, and relevance when working with a college/university if applicable.

Personality-focused, Data-driven Creative: Compelling creative is the vehicle by which you claim your position in the market. It needs to reflect your authentic brand story and make it clear what sets you apart. Carnegie's approach to creative work is a fusion of logic and feeling; it harnesses the power of human connection. We base all copy, design, and imagery decisions on your research-rooted brand story and positioning strategy.

Our campaign concepts are one of our most powerful vehicles for brand expression, offering a unique and compelling framework within which your institution can tell your story across campaigns, channels, and audiences. Each concept is designed to be:

Versatile: Usable across communication types and channels such as print, email, web, digital, billboards, and signage across campus.

Extendable: Speaks to any fact, event, or news item; any audience; and any aspect of the institution's personality and story.

Long-lasting: Purposed to last up to three years or more, depending on overall success and metrics.

As we refine the conceptual work and execute across multiple channels, we use your authentic personality as the filter through which decisions are made. Add to that time-tested industry best practices—such as Search Engine Optimization or clear calls to action—and we've proven that we consistently deliver inspired content that compels audiences to take action.

Of course, creative concepts and visual identity are one piece of the puzzle in growing institutional enrollment and increasing brand recognition. Our seasoned enrollment and marketing strategists collaborate with our client partners to understand their chief goals, diagnose their unique challenges, assess their operations and communications execution as compared to industry best practices, and put action plans in place to realize all the potential in their target markets.

In the attached document, we've provided examples of successful campaigns and related creative outputs and results. From introductory situational and competitive analysis to persona and messaging development, every image, pixel placement, and design we produce is based on each client's unique personality and their specific goals.

Athletics Branding

Describe experience with athletics branding. Highlight experience with Division I or II NCAA, if applicable.

We work with several higher education institutions whose athletics brands have been a specific focus of our work. Samford University (NCAA Division I) approached us with the need to align its academic and athletic visual identities—University leadership long felt its athletic logo didn't feel "right", but they weren't sure why. We conducted consensus-building workshops that provided the foundation for Samford's authentic institutional personality, and we used that personality to drive the development of a brand-new athletics logo, which entailed tweaking the academic logo to align with personality and creating a crossover logo that tied the two together. Qualitative and quantitative testing was conducted to determine internal and external perception of the new logos prior to launch. During our partnership, Samford has seen a growth pattern that exceeds national norms, recently setting a fall enrollment record for the 12th consecutive year. Over the last five years with Carnegie, Samford has seen record growth in applications, admits, deposits, academic and geographic profile, and massive inquiry growth. We completed similar athletics branding scopes of work for Rhodes College (Division III) and California University of Pennsylvania (Division II), conducting brand and market research prior to redesigning custom suites of athletics logos and branding materials.

2.1.9 If yes to 2.1.8, provide at least one case study of successful Division I Athletics campaigns.

The University of Alabama partnered with Carnegie to leverage a bowl game appearance and build brand awareness for the University. With increased web traffic to the Alabama website as a result of the game, our digital strategies included Display Retargeting capturing and re-engaging with key audiences visiting key web pages. Additionally, we geofenced the stadium on game day and launched a Mobile Footprint campaign. Through geofencing and mobile location targeting, we collected the mobile devices of fans in attendance and were able to deliver relevant and targeted static ads and engaging pre-roll video to their phones. Then, for extended reach, once the audience returned home we were able to match those mobile devices to their home IP addresses allowing for delivery of ads across all devices in the home which provided Alabama continued brand awareness campaigns long after the game was over. The campaign ran for a short duration and generated thousands of impressions, and in particular, the pre-roll campaign had strong engagement generating 1.07% CTR, well above our agency benchmarks.

When Syracuse University moved to the ACC Conference, we worked to develop a marketing strategy that allowed them to gain exposure and recruit within the primary ACC states (NC, SC, GA, VA). The basketball season prior to this move brought Syracuse to the final four, creating an opportunity to pivot into these markets immediately and leverage this athletic success to launch recruitment messaging in the new ACC markets.

Measurement of Success

Define a set of metrics and measurements for the success of the project.

Successful completion of the research results in a personality solution typically involving three archetype colors. This metric allows for full expression of personality in creative and content delivery. Further, sampling from a myriad of stakeholders and including interactive workshops allows for consensus-driven decision-making. As such, one metric we use is the number of stakeholder engagements and the resulting data coming from faculty, staff, students, alumni, and administrators. Finally, optional future benchmarking of findings in the proposed add-on perception study can show movement in the familiarity, reputation, and personality perception of the institution to the general public.

Expand on the definition of the metrics and measurements that are used to define the success of this project. How do you adjust if the research and personality solution does not fall definitively in one of your defined areas? How are you flexible in your plan when that happens, what changes in your strategy and methodology are made to reach the desired success?

Metrics for success in a personality solution include clarity, specificity, and acceptance. Clarity deals with how well the personality solution is revealed and explained through the data. A clear personality solution will include a blended archetype framework that sets out specific storylines for stakeholders to easily understand and champion. Specificity refers to how well the personality solution identifies the unique aspects of an institution and uses evidentiary points to build out storylines about it. Finally, acceptance is the reception from stakeholder groups. This comes not only from the solution itself but also the consensus-driven approach and methods of the workshops. When key stakeholders help to create the messaging and bring personality to the forefront, they're much more accepting of the final result. In each case, personality solutions are weighted and customized to best exemplify these three metrics.

Institutional personality can be complex—but our research anticipates this reality with personality solutions that are customized around our archetype framework rather than fully restricted within it. This includes varying ratios of personality that account for blending of ideas. When evidence and data suggest distinct challenges and unique personality properties, we adjust and promote strategies that combine our archetypes or define them with greater focus on certain aspects that are most important to our client audiences. Every set of workshops is customized with live data results from previous client input, allowing for unparalleled flexibility. One reason for this mixed-method approach to research is the chance to weigh our methods against unique situations found in a client's personality. Thus, we don't have a set of defined outcomes we fit clients into—your data is your outcome. Our archetype platform is simply the framework within which we talk about the data.

How do you establish goals, define KPIs, track/report results, and measure ROI?

As strategists first—and specifically, strategists who have first-hand experience leading admission and marketing teams in higher education—we make sure we understand your unique challenges before we dive into marketing strategy. Both the goals and KPIs for our work together are based entirely around your enrollment, branding, marketing, and/or political hurdles. Are you not currently enrolling the class you want, either in numbers or composition? Are you suffering from a lack of awareness in the market or a misperception? Are you desiring to build consensus and train internal ambassadors that will ensure a consistent brand message is being told across the campus community?

Once your challenges are appropriately defined, we work together to identify appropriate achievable goals. Your KPIs are then confirmed, and it's important to consider both quantitative and qualitative KPIs for an accurate understanding of success. Two examples below demonstrate how we think about goals and KPIs and thus, how results should inform how ROI is being determined.

Example One

Chief goal: Identify the brand story and ensure consistency in its communication to internal and external audiences.

Objective one: Collect market research to inform the positioning strategy and support the final recommendations.

Key Performance Indicators:

- + Representation (internal and external audiences; appropriately diverse demographic breakdowns)
- + Familiarity
- + Reputational perception
- + Perception of personality
- + Perception of specific facets of the institution

Objective two: Build consensus through the brand story development process to ensure the best possible buy-in from a diverse set of stakeholders; confirm adoption of story across campus.

Key Performance Indicators:

- + Clarity (clear, specific, understandable solution)
- + Specificity (identifies uniqueness and uses evidentiary points to build out story structure)
- + Acceptance (reception among stakeholders as measured by attendance numbers and cross-campus representation in internal stakeholder workshops, master strategy sessions, and message training events)
- + Implementation (improvement in results between collateral audit and subsequent collateral review)

Objective three: Execute branding and awareness campaign to clarify brand story with external audiences.

Key Performance Indicators:

- + Clarity (audience can easily identify primary archetype(s) represented in campaign)
- + Perception shift (lessening or removal of identified negative perceptions or misperceptions)
- + Reach (number of households with exposure to paid ads)
- + Awareness (gains in familiarity)
- + Engagement (click-through rates on paid ads; website traffic, bounce rates; time spent on page)

Sample Client Scenarios

SAMFORD (GOAL-FOCUSED)

Carnegie has been a proud agency of record and partner for Samford University since 2016, delivering an expansive suite of services for the University to increase enrollment and reputation strength. Samford University continues a twelve-year growth pattern that exceeds national norms, setting a fall enrollment record for the 12th consecutive year. Over the last five years with Carnegie, Samford has seen record growth in applications, admits, deposits, academic and geographic profile, as well as massive inquiry growth. In fact, after implementing Carnegie's psychometric recruitment marketing approach—which was fully mechanized for the 2017 cycle—Samford University saw an unprecedented “inverted funnel” for the first time in its history; that is, Samford's top of the funnel size and spend decreased significantly, while the bottom of the funnel deposits and matriculation grew over the same horizon. This coveted enrollment result was made possible by implementing our psychometric approach to marketing and enrollment, which is founded upon understanding and focusing the University's personality and story, and delivering that story to a specific, segmented set of audiences. Samford's success has continued into the present cycle, and the strength of our partnership continues as we create the next evolution of psychometric admission materials for the University.

FORT HAYS STATE UNIVERSITY (GOAL-FOCUSED)

Over the past two years, Carnegie has partnered with Fort Hays State University on an array of critical marketing, identity, creative, and enrollment needs, including private executive consulting for President Tisa A. Mason. Specifically, the University's driving goal was to clarify its story in order to combat perception issues around lack of value. As FHSU sought to maintain its on-campus enrollment in the presence of challenging market factors, Carnegie was charged with producing the research, strategy, and creative that would allow the University to compete. We developed the marketing capabilities and internal alignment on messaging and marketing strategy to drive consistency of storytelling across the institution, including a re-imagined .edu, new organizational structure, operational leadership during executive transition, diverse creative outputs in print and video, and marketing and message training for stakeholders. While Carnegie will not claim direct responsibility for FHSU's record spring enrollment in 2019, we certainly had a tangible influence on the University to this end. A suite of deeply personified, campaign-integrated collateral has presented a clear and cohesive brand narrative to the market, building out a more personified comm-flow to prospective students and becoming a feature narrative across key donor/partner communications.

LIPSCOMB (ONLINE-FOCUS)

Lipscomb University sought our counsel on how to position their online programs, create awareness in key markets, and drive lead conversion through traditional and digital media tactics. We completed a perception study specific to their online programs, a competitive audit specific to their online competitors, online program student personas, and a campaign creative emphasizing their online offerings that was executed via a robust media plan. All communications aligned with the University's master positioning strategy while also speaking directly to the online audience.

CORNERSTONE UNIVERSITY

Cornerstone University's online programs fall within their Graduate and Professional Studies School. Between their traditional undergraduate audience, seminary audience, and graduate and professional studies audience, they were initially perplexed as to how they were going to tell an impactful story in the market and reach each audience effectively. An authentic and strategic enterprise-wide personality solution and accompanying messaging platform helped them see how it could be done well. A full day of intensive training with stakeholders from these units highlighted how to customize messaging for each audience while using the same personality.

Anticipated Risks or Challenges

Include from Supplier's perspective and past experiences, what Supplier believes to be the inherent risks in a project of this nature.

Our research and strategy work is designed with consensus building as a primary goal. For our process to be successful, we'll need a large sample of the University community at our workshops to ensure we glean insight from a diverse, broad spectrum of the University. We'll give you the tools and resources you need to be successful, but the University will own workshop recruitment. Our process works to the extent in which you effectively recruit your community to engage in it.

subscription model

TOTAL TRANSPARENCY AND FLEXIBILITY

As a research-first company, we can't overstate the importance of data sharing and empowerment. When we share data, we consider it an open invitation that includes public research presentations to all client stakeholders, real-time visibility of campaign results, and ongoing thought leadership, free workshops, webinars, blog posts, and research studies.

Beyond having the data at your fingertips, we want to ensure your team knows how to read and interpret the data, strategies, and tactics that form the foundation of our recommendations to you. With unhindered access to all the experts on your Carnegie account team, your questions, concerns, and challenges will be met with open-mindedness and clarity.

THE ANNUAL SUBSCRIPTION

We are a company that listens, collaborates, adapts, and leads. This extends not only to what we offer but also how we do business. Our annual credit model gives you flexible access to our entire portfolio. You're in total control, and you can adjust your credit placements as we go.

As we know all too well, needs and challenges shift and change on a regular basis, and we believe our solutions should be nimble enough to shift with it. Carnegie offers a complete end-to-end portfolio of communication services that generate results for whatever challenges you may face.

Some advantages of the subscription plan:

- + Scope for the year is not locked in; your credits allow a free-flow exchange of any products and services in our extensive portfolio.
- + When you renew your subscription, unused credits rollover at full value.
- + Consistent, balanced monthly billing with no hidden fees.
- + No change order hassle or fees.
- + Discounts ranging from 5%–20% off our standard list.
- + No restriction on staff access. Want to talk to a specific EVP? Our CEO? Just ask and we'll have them on the next Zoom call.

Website

Is your approach to kick off a project and then determine which CMS is a fit? We have been demo-ing a few products so we can get a more global sense of investment.

Our team has worked with many different CMS but we work most often with the Big 5: WordPress, Drupal, Hannon Hill's Cascade Server, TerminalFOUR, and ModernCampus' Omni CMS but we most definitely have evaluated and recommended others, such as HubSpot. Our approach is to do a discovery call with you once we have kicked off the project, evaluate the campus needs, evaluate the criteria against each CMS and then make a recommendation based on functionality and needs. If you have a list, we can work with it.

Describe your company's quality assurance program. What software development standards, programming guidelines, test plans, etc. are used?

A complete quality assurance review will be conducted following site development and content migration, including site speed and load time testing, design alignment review, ADA compliance and 508 accessibility standards review, standard web browser and device testing, Search Engine Optimization review, and user permissions confirmation.

Please describe any relevant privacy and security policies and procedures for use with the solution.

Assuming the solution lives on campus-owned servers, we recommend the final solution include SSO using an active directory to ensure those accessing the CMS are restricted to the organization and can't be accessed outside the firewall. If hosted by a third-party, use of SFTP is recommended for the transfer of files. As for privacy, all created forms will utilize error checking and appropriate fields with timeout mechanisms in place to ensure sensitive data is scrubbed. We also recommend not sending sensitive form data via email. Also, any data stored in the CMS should have a regular purge schedule so any sensitive data doesn't remain on the server.

Describe how your company protects user data.

We have a full data-sharing and management agreement that is provided and agreed upon by both parties. Typical provisions include agreement to maintain student data confidentiality to any third party, the utmost degree of care and safeguarding for user data, secure and encrypted communication protocols, and no claims of ownership of user data (which remains property of the University).

What challenges do you anticipate in serving our institution and how do you plan to manage these? What assistance will you require from us?

All website projects come with several inherent challenges due to the decentralized organization of the institution, the visibility of the project, and the lengthy nature of the timeline. To mitigate the decentralized nature of the University, as well as the potential for loss of stamina and significant delays caused by competing priorities, we'll ask that you:

- + Appoint a single project lead on behalf of the University to establish a clear communication channel for the length of the project;
- + Identify subject matter experts for all content-related work; and
- + Identify a primary spokesperson from the IT, marketing, and admission offices.

To mitigate decision ambiguity and fatigue driven by the desire for inclusivity and consensus, we ask that you form a small core committee of folks who will make the final decisions on all things website related and then nominate a handful of other internal stakeholders who will provide needed perspectives/feedback on the work in an ongoing fashion. These two layers of organization are critical to ensuring that the University community is well represented but also that the work is not delayed by indecisiveness.

What insights into higher education website best practices, including content management can you share—what's working and what's not, what pitfalls can we avoid? What are the latest techniques to create user engagement and keep students/alumni/donors immersed in the content? What can we do to create a more robust search function—one that's easy to use, accurate and offers suggestions, not just lists?

Based on our research in our white paper, *The State of Site Search on Higher Ed Websites 2020*, and our own consulting work, we've identified eight best practices for site search. Here are our top three:

Use structured content. Developing content for your site based on best principles of SEO is important for organic search results. But keyword searches have limitations for on-site searching. So consider where and how you can use structured content—content that can be stored in a spreadsheet or database—to facilitate detailed searches. For example, discrete fields for first name, last name, or department provide the opportunity to deliver the exact result a visitor is looking for to augment keyword searches of web pages.

Track and monitor analytics. Use Google Analytics, at a minimum, to track site search. Google Analytics allows you to track the pages where visitors began searching on your site; the terms they searched for; the web pages they visited after clicking on one of the search results; and how effective the search results were in generating further engagement, transactions, or conversions.

Pay attention to search scope. Content quality has a huge impact on search results, so you want to carefully explore how your Google Analytics review can help you determine what content your website visitors are clicking on as a result of their searches. You should review this content regularly and make sure it's updated. When outdated content shows up in results, update it or archive it. If you see multiple searches for content that exists somewhere on your site—perhaps in a subdomain—but doesn't appear in the search results, ensure that domain is linked to your on-site search. Searching the correct subdomains, omitting old/archived content from results, and pruning content all improve search quality.

Will there be a dedicated team working on our site? Who are they, what's their expertise and what experience do they have?

Our website team is small by design and mighty by experience. We choose our projects carefully so that we're never over-extended. Our proposed project team for The University of Central Oklahoma is, in fact, our entire team, led by two EVPS for web strategy and web operations. We always work together—internally and with you—because working together is more fun and leads to better ideas and results.

What haven't we mentioned or thought about?

The traditional enrollment marketing funnel has morphed into an enrollment and marketing ecosystem in which students may interact with institutions across entry points, channels, time, and space in non-linear ways. As we embrace this emerging ecosystem, three topics have come up repeatedly in our conversations with clients and colleagues in recent months:

The need for greater cross-departmental communication and collaboration. As human beings, we are hardwired to seek connections. The core of our branding work is human connection—helping institutions to connect with prospective students on not only an intellectual level but also an emotional level. And we know that most decisions are made at the emotional level. The importance of human connection applies to an institution's brand—and also its administration. Simply put, we need to work together better.

The realization of meaningful personalization in web communications. Personalization in support of the prospective student journey is not about amassing a warehouse of content. Meaningful personalization involves stripping away the noise, providing more relevant information, and supporting the journey from meaningful interaction to meaningful interaction. The biggest barrier to meaningful personalization is that we don't understand our audiences enough. When we know what people want to accomplish on your site, we can focus on the content and conversions that matter.

The discipline of measurement and adaptation. The new admissions communications ecosystem demands that every entry point has a message and a metric. We need to look at analytics much more granularly, tracking as people progress in their relationship with your institution. Your brand. A better understanding throughout the process will

make us better at being able to measure – and it's all in service again to making those connections and to cultivating those relationships.

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Please provide any additional information that demonstrates the long-term viability of your company and superiority of your products and/or services.

Carnegie is privately held, offers an extensive portfolio, and maintains a diverse array of client partnerships. We've been in business for over 30 years and have no plans to quit anytime soon. In light of current events, you should also know that our business model is such that we haven't needed to initiate even one round of pandemic-driven layoffs or furloughs. We ensure that our staff are taken care of so that our clients are, in turn, well cared for.

We know our portfolio of products and services is one-of-a-kind because our philosophy and methodology is one-of-a-kind. Below are the differentiators you won't find anywhere else:

- + An innovative and proven approach that uses your institution's distinct personality, weaknesses, and future aspirations as the foundation for all website story development
- + A proven methodology for personality-infused visual translation and content expression
- + Visual and verbal messaging strategies based simultaneously on psychometrics and best practice SEO techniques
- + In-house enrollment, marketing strategy, and digital expertise
- + Data-driven decision-making approach based on institutional personification, audience demographics, audience psychographics, website analytics, search engine algorithms, user testing, and ADA compliance
- + Website personalization through Carnegie Clarity to dynamically adjust content or trigger pop ups to site visitors based on met criteria
- + Attribution and behavioral dashboard delivering insights on user campaigns
- + Robust technical auditing offerings
- + Long-term support with ongoing optimizations and consulting
- + An experienced in-house Digital Marketing team with expertise in both paid and inbound strategies, as well as the ability to launch, monitor, optimize, and report on best practice digital strategies and tactics across all major digital platforms
- + Verified partnerships with major digital brands, enabling "insider" access to cutting-edge solutions, troubleshooting communications, and new offerings
- + Thought leadership across higher education as demonstrated by regular publication of new research and strategies, as well as conferences, video podcasts, and/or workshops centered around knowledge-sharing

Please share a strategy you implemented for a client but the results were not ideal or as you expected? Did you have a chance to solve that and how?

We partnered with Agnes Scott College to relaunch its site which went live in November 2020. Post-launch analytics showed some dramatic, positive increases in site traffic, onsite engagement, and key conversions like requests for information. At the same time, however, we received feedback from constituents and senior leadership about ways to improve the user experience. Through a combination of additional analytics reviews and usability testing studios, we identified and prioritized site changes and enhancements that included:

- Shortening the scroll length on key landing pages
- Changing the positioning and language of important links
- Augmenting digital spaces for internal audiences
- Reconfiguring the Graduate and Post-Bacc admissions section

That work resulted in increased engagement and a better user experience for site visitors. It also established a new mentality at the college — a shift from a website as a one-time project to a website as an ongoing process of experimentation, measurement, and optimization.

[Slate Optimization \(coming soon!\)](#)

For most scopes of work, we bill using a fixed-fee model. What you see in our proposal is the final cost of the project, inclusive of any research incentives. Given the high level of scrutiny that often comes with higher education budgets, both by internal and external stakeholders, we find this to be the most helpful for our client partners because they know the final cost upfront—there are no hidden costs or surprises at the end for overages. The first invoice will be sent upon project initiation, and the remaining invoices are sent upon the completion of project milestones (the billing schedule is always clearly identified in the Statement of Work).

For digital campaigns, we charge a monthly fee as a percentage of media spend that covers strategic management, ongoing optimization, bidding, content and creative changes, and calls or visits needed to ensure the success of your campaign. It also covers all ongoing 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. We begin every project by meeting with stakeholders, gathering any relevant research, and providing you access to a live reporting dashboard. Additionally, we provide monthly reports and a scheduled monthly reporting call where we review your campaigns' performance in detail and deliver insights and recommendations. We also charge a setup fee per campaign that includes all initial strategy discussions, planning, message development, and campaign setups in the platforms. This fee encompasses all the services required to initiate campaigns and ensure the services outlined are launched and delivering.

CLARUS

1.) State the number of years of experience the media buyer/planner has in digital buying and planning strategy overall. 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.

3. Describe current or previous experience working with institutions of higher education, specifically community colleges if applicable. Include institution name(s), services provided, and years of the relationship.

CLARUS was the first marketing firm to focus exclusively on the community college market, and we have provided research services to more than 350 community colleges across the country with the key goal of increasing enrollment at those colleges – which we have a track record of doing.

Through our market research projects for our clients, we have interviewed hundreds of thousands of potential students, employers, community members, high school students, and parents about their perceptions and attitudes about attending a community college. This research has provided us an understanding of the community college market few firms have, and we have used this knowledge to develop marketing campaigns for our clients that provide results – student enrollment.

Since 2015 we have been providing digital marketing services for Community Colleges. The power of today's digital can fill seats in low enrolled programs, reach audiences for the College we have no other way to reach, and increase a college's enrollment – all of which CLARUS has done in the last 9 years. Intelligent digital marketing that moves the needle for your awareness and enrollment goals requires constant adaptation and awareness of market changes. We have a deep understanding of the nuances of reaching and engaging prospective students: which platforms and tactics work best for the time of year and audience, how to align calls to action and messaging with each audience's position in the decision-making funnel, and which strategies drive conversions best. The journey from research to enrollment is quite a unique one when compared to other industries like ecommerce and B2B.

We have become experts in understanding the student journey and knowing not only the right budget to allocate to certain devices, but also which keywords. Additionally, since we work exclusively in higher education means we have access to campaign data for hundreds of colleges and universities across the country, allowing us to create our own benchmarks to compare performance against.

CLARUS CLIENTS

4. Provide fee and rate structure for media planning and buying services and list of any other charges.

CLARUS is a managed digital service, not an agency or a media buyer, which means we manage all placement and campaign delivery directly. We work directly with trusted exchanges and inventory providers, including Google, Simpli.fi, Amazon DSP, Twitch, YouTube, TikTok, Facebook/ Instagram, Spotify, Pandora, iHeart Radio, Snapchat, LinkedIn, and others. We implement various strategies to reach your college's target audiences in an efficient, effective way.

We charge a flat 22% management fee of actualized paid media spend, invoiced monthly, which is inclusive of our team's ongoing management of the campaigns throughout their flight – keyword research, audience development, campaign set-up, and then ongoing pacing, optimizing, and adjustments based on performance and key KPIs. This fee is also inclusive of any and all reporting insights and ad hoc reports needed, as well as access to a 24/7 dashboard to monitor and track performance.

5. Parkland College requires the Agency to collect and compile vendor invoices and contracts and submit them on a monthly basis to Parkland Marketing for payment. Individual vendor invoices and contracts are not to be sent directly to Parkland College.

Our billing is done on a per month basis, based on actual media spend and corresponding fees for the month. For example, the invoice you would receive in August would be for actual media spend from July and corresponding agency fees associated with that spend.

6. Include your review of the strengths, opportunities, weaknesses, and threats that Parkland College should consider in its marketing initiatives.

Major Issues Impacting Community College Enrollments Today

- Declining Enrollment: Community colleges face declining enrollment due to a strong economy, declining birth rates, and increased competition from other educational institutions.
- Financial Barriers: Cost is a significant barrier for many students, especially those from low-income backgrounds, despite community colleges being generally more affordable.
- Access and Awareness: Some students lack awareness of community college benefits and face barriers like transportation issues or lack of support services.
- Retention and Completion: Ensuring student persistence and completion poses challenges due to factors like inadequate support services and unclear pathways to transfer or career opportunities.
- Changing Demographics: Community colleges serve an increasingly diverse student population, requiring efforts in support services, curriculum development, and campus culture.

- Market Dynamic Shifts exacerbated by the COVID-19 Pandemic: The pandemic has impacted community college enrollment due to challenges such as job loss, health concerns, and difficulty accessing online learning.

Market Impacts On Audiences:

- High School Audiences: High school enrollment decline and shifting priorities among students pose challenges. Efforts to convert dual enrolled students and highlight program value are crucial.
- Adult Learner Audiences: Adult enrollment decline highlights the need to target adults with some college education and integrate workforce programming. Financial, time, and accessibility barriers need addressing.

Applicant Conversion Issues Facing Community Colleges:

- Competing Priorities: Work and financial constraints hinder enrollment commitment.
- Financial Barriers: Concerns about tuition costs or aid accessibility affect enrollment decisions.
- Lack of Information: Incomplete understanding of enrollment processes reduces conversion rates, especially among underrepresented groups.
- Application and Enrollment Processes: Complex procedures and limited communication channels deter potential applicants.

Retention Issues Facing Community Colleges Today:

- Academic Preparedness: Many students enter with below-college-level skills, affecting success and retention.
- Financial Barriers: Cost concerns and work obligations impact student retention.
- Balancing Work and School: Juggling work and academic responsibilities leads to stress and may hinder retention.
- Lack of Early Warning Systems: Timely interventions for at-risk students are lacking due to inadequate systems.
- Awareness Of Support Services: Underutilization of available support services hampers retention efforts.
- Personal and Family Responsibilities: Family obligations compete with academic pursuits, affecting retention.

Changing Socioeconomic Characteristics In Service Areas:

- Economic Conditions: Fluctuating economic conditions influence enrollment rates.
- Income Inequality: Financial constraints affect enrollment among lower-income individuals.
- Demographic Changes: Population shifts require tailored communication and programming.
- Access to Education: Socioeconomic factors impact access to education and enrollment rates.
- Employment Trends: Job market demands influence enrollment fluctuations.

Community College's Marketing And Communication Challenges:

- Budget Constraints: Limited resources hinder effective marketing efforts.
- Targeting Audiences: Precision in reaching target audiences is crucial for engagement.
- Changing Demographics: Diverse student populations require tailored messaging.
- Competition: Competition from other institutions necessitates increased marketing efforts.
- Brand Perception: Establishing a clear brand identity is essential for recruitment efforts.
- Digital Marketing: Identifying the right target audiences and utilizing the most relevant platforms can lead to higher engagement.

Calculating ROI for digital marketing campaigns is crucial for community colleges for several reasons:

- Budget Allocation: It helps in determining the effectiveness of different marketing channels and strategies. By understanding which channels provide the highest ROI, colleges can allocate their budgets more efficiently.
- Resource Optimization: ROI calculations enable colleges to optimize their resources by focusing on the most effective marketing tactics. This can lead to cost savings and better outcomes.
- Performance Measurement: It allows colleges to measure the performance of their marketing efforts accurately. This helps in identifying areas for improvement and refining future campaigns.
- Accountability: ROI calculations hold the marketing team accountable for their efforts and expenditures.
- Strategic Planning: By knowing the ROI of past campaigns, colleges can plan future campaigns more strategically.

7. Discuss the media-buying process and provide examples on how the media buyer/planner presents proposed schedules for media buys. The chosen vendor will need to demonstrate experience in emerging digital marketing strategies.

During a planning session, based on our client's goals, we outline the geographic service area, target audiences to be reached, the tactics and platforms to be employed for the campaigns, the timeline, and the budget. We use these planning documents as a guide for the upcoming semesters to guide our work. While the actual campaigns may change due to changing marketing conditions as we move forward, the client knows ahead of time what we need to do, assets needed, and timelines. In the planning sessions, we evaluate the past

digital campaigns to ensure the campaigns supported the goals identified and make adjustments for upcoming campaigns where needed. CLARUS also provides input into which platforms are performing best given the hundreds of community college campaigns being managed annually – advising on the best practices seen. Campaigns are also examined against national KPI for education to check on performance. But ultimately, changes in applications and enrollments are the most important measures for a campaign. We also rely on our partners (Google, Facebook, Snapchat, TikTok, Claritas, Experian, and the CLARUS Consulting Division) and our associations (CES, ACCT, NCMPR, TACCM, AACC, and CCPRO) to provide us with the latest in trends in technology, digital marketing, platform changes, national trends, community college trends, and student behavior.

8. Include how your agency will track and report ad performance analytics. Parkland requires at least one quarterly review and planning meeting to ensure campaign strategy is on track and meets ad performance objectives.

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. CLARUS 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.

Just because a campaign ended does not mean it is over for us. If desired, we request the list of applicants or enrollees from the College and match against the target audiences to determine ultimately did they enroll and/ or apply – the ultimate ROI for the campaign. At the end of a campaign or series of campaigns, we

do a review presentation – a detailed overview outlining the details of the campaign, lists of outcomes for any households geofenced for upload into the College's CRM, if applicable, and an assessment of tactical changes which may improve the results for the target audience in future campaigns.

We provide visual representation of data in various forms, from infographics which are easily understood and shared internally, maps of student enrollments from campaigns, other visuals as needed, and ad hoc reports. Our job is to support the Marketing Team to tell the marketing story internally to the College community – in any form needed.

9. Provide information about the Agency team structure and team member backgrounds that will directly support Parkland College.

At CLARUS, higher education isn't just one area we work in—it's been our focus for the past three decades. Additionally, many of our staff have worked at community colleges and universities, so we understand the enrollment cycle, challenges you face, and expectations of your prospective students better than anyone else. In short, we get it, and you won't spend your valuable time educating us on your industry. You get more for your money when your digital campaign is well run. Because CLARUS works exclusively in higher education, we have concentrated insights—which lead to the best decisions for your campaign. We've developed benchmarks, budget strategies, reach, and frequency volume that lead to conversions and tactical adaptations unique to higher ed. Digital is not a one-size-fits-all channel, and our insights will help tailor the most effective strategy for you.

We begin every project by meeting with 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.

We will start with kickoff and planning meetings between all members of the teams. We'll confirm goals, audiences, and priorities 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.

10. Parkland Marketing requires a 30-minute weekly call to discuss campaigns. How will your agency staff the team to support these calls?

We are looking forward to scheduling 30-minute weekly calls to review current and upcoming campaigns. We will have the Account Manager assigned to Parkland College on every call.

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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.

11. Include partnerships with specialized agencies (SEO, multi-media, database, etc.) that would influence service to Parkland College. As a full-service agency for higher education, our team is fully equipped to develop all creative development support needed for your campaigns. We offer a full suite of creative and marketing services, from campaign concept development and multimedia to digital ad design and placement. All our creative development is crafted with best practices for each platform we serve. Our in-house SEO team provides a full suite of services, including but not limited to technical site audits, content optimization, long and short-form copywriting, organic social media consulting, and more.

Additionally, we're committed to staying on the cutting edge of an ever-changing landscape. We're held to the highest standards of expertise through our Google Premier Partner status and direct partnerships with leading platforms like LinkedIn, Spotify, and more. LinkedIn has recognized our graduate marketing work as "best in class" and has co-sponsored research projects and co-presented with our team at conferences and workshops. We work hand-in-hand with LinkedIn to ensure we're leveraging and innovating the best strategies for enrollment marketing.

12. Agencies are invited to include additional information not requested above, if believed to be useful and applicable to this Request for Proposal.

We are a full-service marketing and enrollment strategy partner. We provide custom integrated solutions ranging from market research and branding to digital advertising, website development, lead generation, Slate CRM optimization, predictive modeling, and Student Search.

We have strategically built our company service portfolio to meet this moment in higher education. Audience behavior has changed, and colleges can no longer trust conversion through the traditional enrollment funnel. What we're seeing is a complex ecosystem of audience engagement across channels, and the schools that are winning are those delivering personalized, custom, and responsive messaging to students based on who they are and where they are in their decision journey. The difference now is that students and families are in control, and you have to meet them where they are when they're ready to engage. CLARUS provides custom solutions to drive conversation at every point of engagement.