



# Drake University

'24-'25 Annual Recommendations

**CARNEGIE**



# Drake University Recruitment and Marketing Leaders,

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

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

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

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

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

**Go bulldogs!**

**Kelsey Anderson**

VP, Client Success

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# Our Proposed Approach

# Your goals are our goals

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

**We understand that you need to:**

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

# Landscape changes demand a new approach

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

**1 million**

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

**22%**

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

**55%**

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

**30%**

The percentage of  
college freshmen who  
drop out

**6**

The typical number of  
colleges and universities  
that seniors apply to

**\$58T**

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

**25%**

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

**35%**

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

**92%**

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

# Yield-focused Approach to Student Search

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

**A collaborative partnership focused on yield.**

## + *Tip the scale*

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

## + *Use personality to personalize*

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

## + *Campaigns should be agile*

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

## + *Data should be owned and available*

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

## + *Resources should be used efficiently*

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

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

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

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

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



# Research + Assessments

# Competitive Analysis

Our competitive analysis deeply explores your positioning against your direct competitors—schools with whom you most highly compete for applications. We place ourselves in the position of a student, absorbing all available communications they might find through search engines, websites, advertisements, and relevant print publications. Each profile—yours and your competitors’—examines narrative positioning, messaging, and storytelling tactics.

Discover which value propositions and storylines Drake should lean into most heavily to differentiate from top competitors.

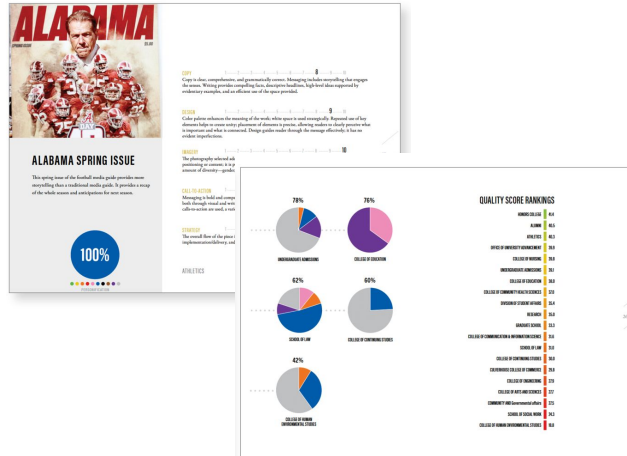


## KEY INSIGHTS:

- Rise above the noise with our proprietary personality analysis. We uncover the quality of your college or university's current brand storytelling and empower you to better express your narrative.
- We analyze multiple platforms to reveal channel-specific trends and traps and equip you to avoid common pitfalls across your own.
- We identify where an unclaimed marketing opportunity exists and how to evolve your position and reshape your campaigns to claim it.



# Collateral Analysis



With our collateral analysis, we bring our higher education expertise combined with our first hand creative agency experience to your marketing and communications table.

We assess an allotted amount of your high-impact and high-volume print pieces against a rubric of industry-wide best practices and personality-rooted storytelling techniques to provide actionable feedback on visuals and editorial.

Our summary observations, product rankings, charts, and recommendations will provide a big-picture view and help you prioritize areas and collateral that could lean into [Drake's recently completed messaging platform](#) more boldly.

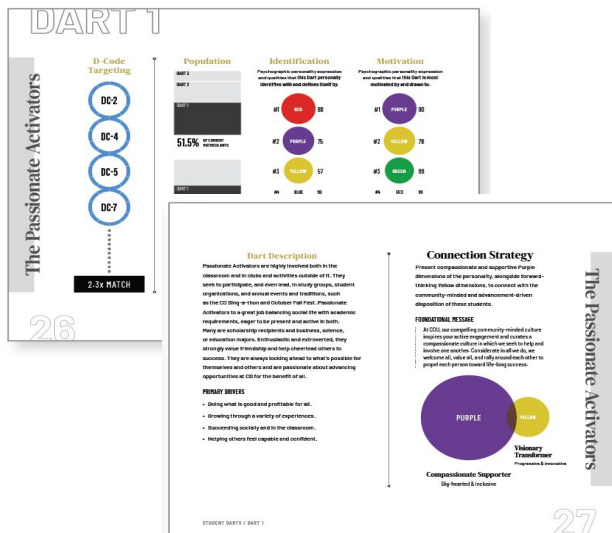
## KEY INSIGHTS:

- A comprehensive approach to marketing and communications strategy, leveraging both industry knowledge and creative storytelling techniques.
- Review of either 6, 8, or 10 pieces of collateral.

# Psychographic Darts

You are well aware of the high expectations of the students you recruit—**Motivators** is Carnegie's national student research bringing you closer to more emotive communication meant to increase engagement at each phase of the search process.

With our deep knowledge of who Drake University is, with recently completed research and build of new messaging platform, it is more important to prioritize understanding *your* students and why they are attracted to who you are; leaning into each storyline differently during increased segmented communication.



## KEY FEATURES:

- **Demographic cluster analysis:** custom analysis of your specific enrollment data and Carnegie's proprietary database of 250 million people across a wide variety of demographic variables.
- **Student psychometric workshops:** interactive workshops to capture your student's psychometric characteristics with who knows them best, your currently enrolled undergraduate students.
- **Quantitative survey:** sent to your undergraduate student population to verify the psychometric and demographic alignment to create your custom Dart profiles.
- **Dart Strategy Deliverable:** cluster analysis, Dart workshop, and survey findings, along with guidance on how to strategically communicate and market to your custom Dart profiles. Monthly unlimited prospective student records tagging of Dart profiles.
- **Dart Application Guide:** We'll create a guide demonstrating how to market effectively to identified Darts through message samples and stock and client image selections. This internal tool will empower your professional communicators to create psychographically segmented materials with confidence.
- **Training** following the presentation of Darts Strategy Deliverable.

# Slate Executive Audit

The Executive Audit is a comprehensive evaluation designed to assess the utilization, efficiency, and effectiveness of your Slate instance. Over the course of a 2-month project duration, our team of experienced consultants will conduct a thorough analysis of key Slate modules and functionalities to identify opportunities for optimization and improvement.

## KEY SLATE MODULES:

- **Deliver**
- **Rules & Automations**
- One 75-minute project call reviewing outline and summary of audit findings and recommended priorities.

Filters [Query Profiler](#) Matching Rows: 846

Exclude Carnegie Messages ☐ Not Exists

Completed, Running, or Scheduled ☐ Exists

Start Date >= 8/1/2023

Filters [Query Profiler](#) Matching Rows: 74

Carnegie Messages ☐ Exists

# Enrollment Communications Assessment

## OBSERVATIONS & RECOMMENDATIONS

The University of Tennessee (UT) Admissions Office is a consistent, hard-working team that has done well to implement the practices required to maintain stable enrollment numbers. However, numerous initiatives, most notably the university's blossoming partnership with the Clinical Health System, have placed UA at the precipice of a new season in its storied history. By adopting a comprehensive set of enrollment-focused best practices—utilizing a targeted search strategy, relationship-based early nurturing, and cross-divisional strategic planning—UA has the opportunity to strengthen its enrollment, expand its reach, and grow its reputation.

This opportunity is remarkable, but the challenge it presents is significant. The partnership with the Clinical Health System—and the university's strategic investment in the health sciences—immediately elevates UA to a new tier of competition and requires the need to implement a best practice model in all areas of the university's enrollment strategy. Solving these challenges in this new space lies the advantage of well-established brand awareness, and many already leverage significant search strategies, powerful early nurturing programs, detailed market segmentation, and highly targeted enrollment goals in order to build strong classes of high-achieving students.

Additionally, demand for higher education has compressed in recent years—especially in the Northeast—which is also expected to further weaken over the next decade. The off-ramp from previous decades of industry-wide growth into a highly competitive market place environment will cause substantial disruption and require new strategies for success. In order to overcome these market-based challenges, support the emerging vision of the institution, and reach a market leader, UA will need to substantially rethink the scope and scale of its enrollment management operations and implement a more robust enrollment communications free strategy.

In order to realize these new and emerging challenges, the UA Chancellor hired a new Vice-Chancellor of Enrollment Management with comprehensive control of all enrollment management, including financial aid, registrar, athletics, and student life beyond the typical enrollment functions. Now is the perfect time to capitalize on the university's forward momentum and take the necessary steps to reach new levels of total enrollment success.

In order to take full advantage of this opportunity, UA must first set specific and strategic enrollment priorities and goals, collecting holistic data from all divisions—especially the academic departments at the center of the university's emerging vision. In order to do this, UA should leverage the strategic enrollment planning processes across divisions, including academic deans in annual planning meetings and expecting them to play a vital role in working collaboratively towards greater enrollment success. Additionally, by referring to enrollment-focused structures and working relationships, UA will provide a safeguard against process disruption through any future staffing changes. The UA Admissions Office is already doing many things exceptionally well, albeit with minimal risk or strategic investment in reaching students at the top of the funnel. UA can achieve substantially more by expanding its best practice efforts to multiple areas and also investing in new markets throughout the communications strategy. Moving forward, the university will find the greatest success by creating resources today based on this findings in this report and other strategic resources for enrollment development.

Leverage results and recommendations of completed Slate Audit and review organization and efforts of outreach to all undergraduate audiences. Review and assessment of operations, systems, resources, and communication flow, including frequency, timing, channel strategy, and segmentation.

The analysis will cover all relevant subject areas within enrollment operations and communications. A detailed report inclusive of summary insights and recommendations as well as specific insights and recommendations for each subject area will be provided. Adjustments to any communication Carnegie-run will be completed following review and approval of recommendations post-assessment.

## KEY INSIGHTS:

- 4-7 hours of analysis meetings conducted on-site or virtually. Documents for analysis collected prior to analysis meetings.
- One-hour virtual presentation of the resultant deliverable
- Report provided in PDF, to include executive summary, trends, and insights/recommendations for all subject areas analyzed

# One-Time Investment

- **Competitive Analysis**

Explore your positioning against your direct competitors.

Includes 6 competitors. **\$23,500**

- **Collateral Analysis**

Lean into Drake's recently completed messaging platform more boldly with reviewed collateral with your messaging platform in mind.

6 pieces: **\$5,880** 8 pieces: **\$7,840** 10 pieces: **\$9,800**

- **Psychographic Dart Research, Training, Tagging, and Guide**

Capture your student's psychometric characteristics and leverage in segmented communication and ads.

Development of student dart research inclusive of on-campus workshops and deliverable. **\$63,800**

Unlimited Annual Tagging **\$18,000**

Dart Application Guide **\$11,500**

- **Slate Executive Audit**

Complete a comprehensive evaluation designed to assess the utilization, efficiency, and effectiveness of your Slate instance.

Audit inclusive of Deliver and Rules & Automation Module review. **\$25,000**

- **Enrollment Communications Assessment**

Review and assessment of operations, systems, resources, and communication flow,

including frequency, timing, channel strategy, and segmentation. **\$31,700**



# Search and Slate Efforts

# Lead Generation CollegeXpress

Access to 6 million+ active prospective students and parent. Year-round and unlimited lead generation, including early pipeline development. Connecting with prospective students at every stage of their journey is more challenging than ever before. CollegeXpress is the go-to resource for college and scholarship searches for millions of students, parents, and counselors, which is why it's a trusted tool for hundreds of institutions. Averaging ~ **14% first source contribution** to enrolled classes, making it **two to three times more effective** than any other source.

## '23-'24 STRATEGIES

- 5-State Select (IA, IL, MN, WI, CO)
- Rising Senior Campaign
- So/Jr Campaign

## RECOMMENDED '24-'25 STRATEGIES:

- 10-State Select (IA, IL, MN, WI, CO, TX, KS, MO, NE, ND, SD)
- Custom Outreach via Connect
  - 10 custom emails written and executed in CX database by Carnegie team.
- Premier Placement Ad on CollegeXpress.com website

## KEY INSIGHTS:

- Custom outreach via **CollegeXpress Connect**
  - Search for and conduct custom outreach to prospects and their parents whenever you want.
  - Up to 250,000 outreach credits available
  - Suppression lists can be utilized
- Premier Placement
  - full-page ad on CollegeXpress.com for your school complete with copy, logo, images, and a customized RFI form.

Targeting parameters inclusive of, but not limited to both with Premier Placement Ad and CollegeXpress Connect:

- Top College Choices
- Graduation year
- Academic interest
- Athletic interest
- Geography (zip code, high school)
- Self-reported GPA

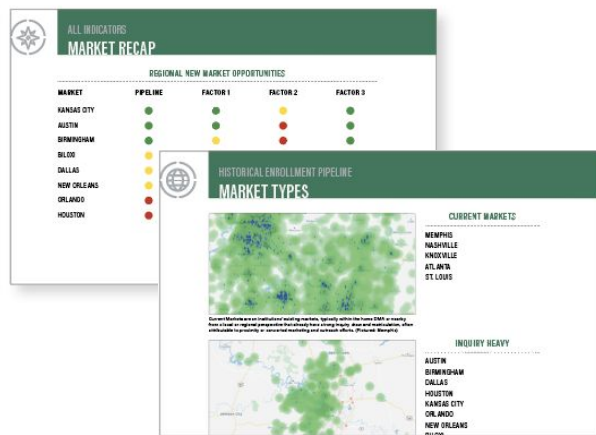
# Name Buy and Enrollment Consultation

Continue to receive recommendations and support around Drake's **name-buy strategy, diversifying sources** based on your **enrollment data, market research, and channel analysis** to ensure that your selections are precise and have the highest likelihood of conversion.

## KEY INSIGHTS:

- Built on historic enrollment data, market research, and a channel analysis your model will reflect an ecosystem approach to recruitment
  - Student Search criteria and recommendation will consider demographic, academic, socioeconomic, and source variables
  - Our recommendation will be data-driven and consider national trends, recruitment opportunities, and comprehensive sourcing options
- Inclusion of proprietary market research through our powerful Market Opportunity Index (MOI) study that provides you with access to rich data like household income, racial diversity, and a powerful higher ed index for opportunity identification, audience prioritization, and marketing execution.
- Agile and modern, our purchasing strategy includes multiple executions and ongoing monitoring for optimization

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





# Slate Full Lifecycle Communication

Build upon and increase Drake's audience segmentation through the inclusion of additional academic breakouts and either the continuation of leveraging Carnegie Motivators or Drake's custom student Darts.

## CAMPAIGNS RECOMMENDED

- Refreshed Darted Senior Search
  - Additional academic segmentation
- Refreshed Darted Senior Application Generation
- Refreshed Darted Senior Yield
- Refreshed Darted Senior Anti-Melt
- Refreshed Darted Sophomore/Junior Search
  - Additional academic segmentation
- Refreshed Search Landing Page
- **Parent/Guardian Campaign** (new)
- **Transfer Population-Specific** (new)
- **Bright College Population Specific** (new)

\*No print planned for any drip campaign

\*No cost difference between segmentation by Motivator or Dart

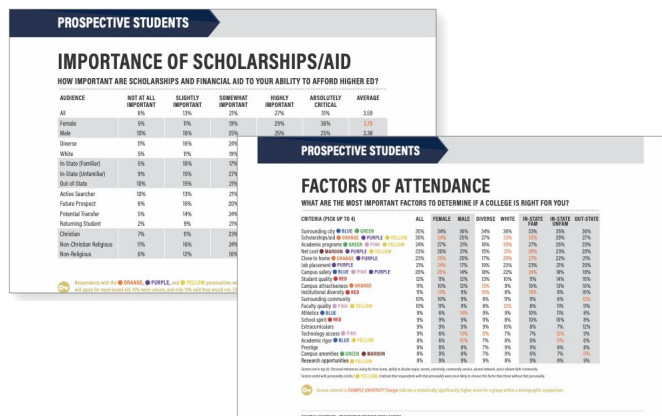
**Note:** Additional academic segmentation planned for within search campaigns. Undefined additional 50 segmentations available throughout campaign execution.

The screenshot shows the 'Campaign Metrics Report' in the Slate system. It includes a table for 'Fall 2022 Campaign' and 'Dart Breakdowns'. The table columns include Metric, Prospects, Inquiries, Created, Submitted, Completed, Accepted, Deposited, Net Deposits, Inquiry, App Created, App Submitted, App Completed, Accepted Rate, Yield Rate, and Hold.

Metric	Prospects	Inquiries	Created	Submitted	Completed	Accepted	Deposited	Net Deposits	Inquiry	App Created	App Submitted	App Completed	Accepted Rate	Yield Rate	Hold
<b>Fall 2022 Campaign</b>															
Senior Search	70,350	206	208	217	42				.42%	.38%	85.87%	19.25%	.00%		
<b>Dart Breakdowns - Person Dart</b>															
Dart 1	15,838	68	38	30	6				.43%	.24%	78.95%	20.00%	.00%		
Dart 2	7,916	29	23	17	4				.37%	.20%	73.91%	23.52%	.00%		
Dart 3	18,635	89	42	37	7				.46%	.22%	88.24%	18.52%	.00%		
Dart 4	27,875	85	57	47	7				.30%	.20%	82.94%	14.09%	.00%		
<b>Market Breakdowns - Person Name Day Market</b>															
Cost	5,746	32	18	11	2				.56%	.28%	68.75%	18.18%	.00%		
Priority	9,151	43	28	17	3				.49%	.21%	85.58%	17.62%	.00%		
Second	10,837	2	1	1					.02%	.01%	100.00%	.00%			
Tertiary	5,362								.00%	.00%					

# Admitted Student Research

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



## KEY INSIGHTS:

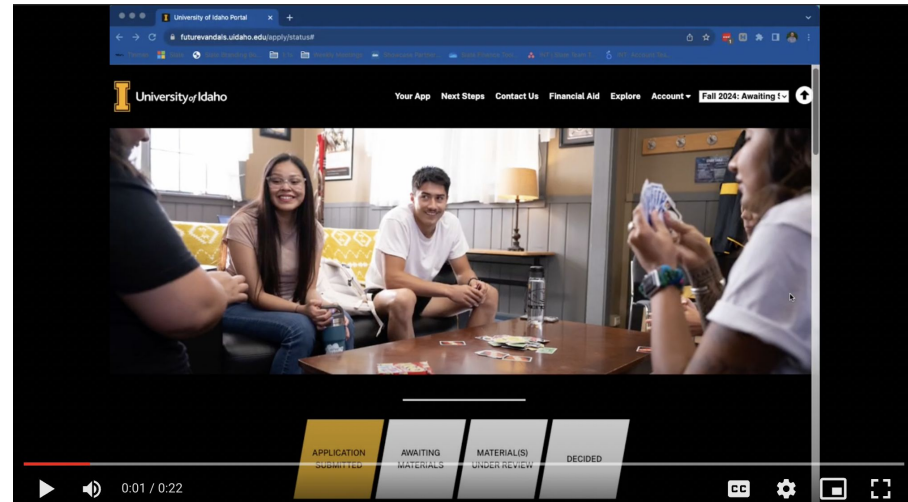
- Gather information about your current senior student's motivation and drive to uncover what personality types Drake is serving well or turning away.
- Additionally it covers a measure of institutional choice, financial aid needs, communication feedback, and an assessment of how well your institution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

# Dart-Based Admitted Student Portal

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

## KEY INSIGHTS:

- Impress all your critical audiences—from anonymous visitors, applicants, current students, and donors to parents, Slate users, external stakeholders, and more—with a **personalized experience in a dedicated portal**.
- Portals are **designed by our award-winning creative team**, but they are then built by our best-in-industry Slate developers.
- Combining flash and function, our **dynamic portals drive engagement in each interaction**, no matter the end user.



Sample Admitted Student Portal

# Enrollment Recommendations

## ● CollegeXpress

Connect with prospective students at every stage of their journey.

10-State Select: **\$20,000** CollegeXpress Connect: **\$5,000** Featured Site Ad: **\$5,000**

## ● Full Lifecycle Communication + Name Buy Consultation

Continue to build upon a solid communication foundation; leverage Carnegie's name-buy and enrollment strategy to assist in the execution of intentional and segmented drip campaigns. Incorporation of additional academic and undefined segmentation. Development and execution of intentional communication with parents of current seniors, prospective transfer students, and prospective Bright College students.

Full Lifecycle Communication **\$182,700**

Name Buy and Enrollment Consultation **\$24,500**

## ● Admitted Student Research

Gather information about your current senior student's motivation and drive to uncover what personality types Drake is serving well or turning away. **\$4,000**

## ● Dart-Based Admitted Student Portal

Custom Application Status portal segmented with Darts designed to serve one student population. **\$27,000**

\*Total spend: \$268,200 (\$24k+ less than previous cycle)



# Paid Media Recommendations

# Digital Strategy Overview

Goal: Increase inquiries and overall enrollment targeting prospective undergraduate students, prospective transfer, and prospective Bright College students.

Strategy: We've outlined integrated digital recommendations inclusive of display, paid search, and conversion-focused paid social media strategies. This plan is mindful of budget and utilizes foundational strategies that insert Drake University at critical moments during students' online search process to drive awareness, inquiries, and application activity. It incorporates your feedback in terms of durations, and priority program campaigns (edits are displayed in blue in the spreadsheet linked below).

Strategy Highlights: .

- + Utilizing TikTok and Snapchat to generate both awareness and inquiries for prospective undergraduates.
- + Leveraging PPC to generate inquiries from mid-funnel users who are actively searching your keywords for general undergraduate, and priority programs.
- + Incorporating the always-on tactics of Display Retargeting campaigns (Bright College, Transfer, Undergraduate) to drive application behavior for those who have visited key web pages on your site
- + Inclusion of IP Targeting pushing apply and yield messaging to respective lists.
- + Create a personalized experience for users on your website in real time based on their area of interest and position in the enrollment funnel utilizing Carnegie Clarity™

**Note:** These recommendations are fully scalable and adjustable to fit any budget or goals.

**Full digital plan.**



# Dart Metrics

# Asbury University

Private  
1,400 Students  
Wilmore, Kentucky

- + Brand Strategy
- + Darts
- + Campaign Concepts
- + Video and Photo
- + Senior Search
- + So/Jr Search
- + Financial Aid Strategy

## Measure, Optimize, and see Results:

- + **Increase Inquiry Yield**
  - + 33.5% v. 30.4% the previous year
- + **Increase in Deposits by 20%**
  - + Overall 25% increase in net revenue
- + **Profile**
  - + Class of 2027 boasts highest average GPA
  - + Increase of 5% in representation from students in bordering states



# Case Study Client A Dart Impact

Private R1 University  
2,400 Students  
Western United States

## Measure, Optimize, and see Results:

- + **Increased YOY Deposits**  
+18% Net Deposits (22-23 cycle)
- + **Darted Comms Increased Conversion**  
+17% Better Yield (45% vs 28% non-Darted)
- + **Increased Inquiry Conversion on Darted Names**  
+13% Higher Conversion (app gen)

# Aggregated Metrics

Digital Data  
Darted Metrics

## Measure, Optimize, and see Results:

- + **IP Targeting Impact**
  - + 31% lift in engagement with Dart segmentation
  - + Dart segmentation had the biggest impact on Junior and Admit audiences
- + **Snapchat**
  - + 20% lift in engagement with Dart segmentation
  - + If used beyond list-based targeting (leveraging behavioral) there is a greater lift of 43%
  - + Dart segmentation had the biggest impact on the Junior audience

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# High-Level Budget Summary

Service	Scope of Work Summary	Cost
<b>Custom Psychographic Segmentation: Carnegie Darts</b>	All currently enrolled undergraduate students clustered plus the past two to four inquiry cycles; 4 workshops for up to 40 undergraduate students per workshop; up to 800 survey completes; 3-4 Darts identified.	<b>\$63,800</b>
<b>Unlimited Tagging</b>	Unlimited annual Dart tagging for all prospective undergraduate students, tagged once monthly for 12 months.	<b>\$18,000</b>
<b>Dart Application Guide</b>	We'll create a guide demonstrating how to market effectively to identified Darts through message samples and stock and client image selections. This internal tool will empower your professional communicators to create psychographically segmented materials with confidence.	<b>\$11,500</b>
<b>Enrollment Communications Assessment</b>	4-7 hours of analysis meetings conducted on-site or virtually. Documents for analysis collected prior to analysis meetings, one-hour virtual presentation of the resultant deliverable, and Report provided in PDF, to include executive summary, trends, and insights/recommendations for all subject areas analyzed.	<b>\$31,700</b>
<b>Admitted Student Research</b>	Survey remains open until one month past the Client decision deadline date. Questions in the survey to be selected from a list of more than 100 templated options covering topics such as search behaviors, value propositions, institutional and respondent personality, financial aid, communication tactics, and more. Carnegie team to advise on question selection, build survey form in Slate, manage all communications and incentives, and train the Client on data review tools. Results presented in real time in Slate instance. Major insights and recommendations during the final strategic meeting included.	<b>\$4,000</b>

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# Research and Strategy Investment

Service	Scope of Work Summary	Cost
<b>Competitive Analysis</b>	Investigation of your competitive set, examining positioning and storytelling tactics, language themes, tone, style, visual identity, technical considerations, realities, and quality rankings. Insights will reveal opportunities to differentiate from the competition.  Includes 6 competitor profiles.	<b>\$23,500</b>
<b>Collateral Analysis</b>	Analysis of 6, 8, or 10 collateral pieces.	6 pieces: <b>\$5,880</b> 8 pieces: <b>\$7,840</b> 10 pieces: <b>\$9,800</b>
<b>Name Buy Consultation</b>	We will deliver a name-buy recommendation and diversified sourcing strategy based on your enrollment data, market research, and channel analysis to ensure that your selections are precise and have the highest likelihood of conversion.	<b>\$24,500</b>
		<b>Total: \$182,880–\$186,800</b>

# High-Level Budget Summary

## Service

## Cost

<b>Research and Strategy</b>	
Custom Psychographic Audience Segmentation (Student Personas). Including:	
- Dart Application Guide	
- Unlimited Tagging	
Enrollment Communications Assessment	
Admitted Student Research	
Competitive Analysis	
Collateral Analysis	
Name Buy Consultation	
<b>CollegeXpress Strategy</b>	
Undergraduate State Select	
Undergraduate Prospect Database Access	
Featured Site Ad	
<b>Slate Services</b>	
Slate Communication Campaign Bundle	
Slate Executive Audit	
Darted Application Status Portal	
<b>Total:</b>	<b>\$447,580-\$451,500</b>

# CollegeXpress Investment

Service	Scope of Work Summary	Cost
<b>Undergraduate State Select</b>	Lead generation campaign to prospective undergraduate students from IA, IL, MN, WI, TX, KS, MO, CO. NE, ND, SD via CollegeXpress platform. Includes database access, CollegeXpress.com profile development, and CRM integration. Campaign duration: 12 months.	<b>\$20,000</b>
<b>Undergraduate Prospect Database Access</b>	Access to the CollegeXpress database to search for and conduct outreach to prospective undergraduate students and parents. Targeting parameters include: top college choices, graduation year, athletics, majors, location, GPA, gender, religion, and more. 250,000 send limit. Includes 5 pre-written emails for your use.	<b>\$5,000</b>
<b>Featured Site Ad</b>	One full-page ad with featured placement on CollegeXpress.com. Includes customizable RFI form for your target audience.	<b>\$5,000</b>
	<b>Total:</b>	<b>\$30,000</b>

## Refreshed Undergraduate Campaigns – Darted

### DISCOVERY, SUPPORT & STRATEGY

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

### CREATIVE DELIVERABLES

- Refreshed copy for dynamic drip emails and text messages
  - **Senior Search:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed)
  - **Underclassmen Search:** 20 emails for up to three subpopulations (e.g., Junior, Sophomore, Freshman, etc.)(up to 5 emails segmented by Dart and up to 10 additional segments as needed)
  - **Application Generation:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed) and five text messages
  - **Yield:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed) and five text messages
  - **Anti Melt:** 15 emails (up to 5 emails segmented by Dart and up to 10 additional segments as needed) and five text messages

### CREATIVE DELIVERABLES

- A bank of up to 12 ad-hoc emails to be used for strategic recommendations or pivots for any population with which we are communicating
- Refreshed design for three email templates and 10 additional email header designs
  - Two standard-style (including header, footer, and one variable CTA button) and one newsletter-style (including multi-section layouts featuring various imagery, and graphic elements)
  - One email header design per Dart/Motivator
  - One additional email header design per campaign

### CAMPAIGN DELIVERY & ANALYSIS

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

### SEARCH LANDING PAGE

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



## New Additional Campaigns – Unsegmented

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### SUPPORT & STRATEGY

- New campaign strategy and communication plans
  - Guidance regarding communication strategy and Slate Deliver best practices
  - Insight into Carnegie partner benchmarking data relative to campaign performance and overall conversions
  - Annual campaign assessment
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### CREATIVE DELIVERABLES

- Copy for dynamic drip emails and text messages
    - **Parent/Guardian:** Copy for 15 emails for up to three subpopulations or statuses
    - **Transfer:** Copy for 15 emails for up to three subpopulations or statuses
    - **Bright College:** Copy for 15 emails for up to three subpopulations or statuses
  - A bank of up to 9 ad-hoc emails to be used for strategic recommendations or pivots for any population with which we are communicating
  - Design for three email templates and 6 additional email header designs
    - Two standard-style (including header, footer, and one variable CTA button) and one newsletter-style (including multi-section layouts featuring various imagery, and graphic elements)
    - Two additional email header designs per full campaign
- 

### CAMPAIGN DELIVERY & ANALYSIS

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

Service	Scope of Work Summary
<b>Refreshed Darted Senior Search</b>	15 emails (up to 20 segments total) with header swaps
<b>Refreshed Darted Sophomore/Junior Search</b>	10 emails (up to ten segments total) with header swaps
<b>Refreshed Search Landing Page</b>	One refreshed Slate-hosted landing page portal
<b>Refreshed Darted Application Generation</b>	15 emails (up to 20 segments total) and five text messages with header swaps
<b>Refreshed Darted Yield</b>	15 emails (up to 20 segments total) and five text messages with header swaps
<b>Refreshed Darted Anti-Melt</b>	15 emails (up to 20 segments total) and five text messages with header swaps
<b>Parent/Guardian Campaign</b>	15 emails (up to 20 segments total) and three subpopulations with header swaps
<b>Transfer Population-Specific</b>	15 emails (up to 20 segments total) and three subpopulations with header swaps
<b>Bright College Population Specific</b>	15 emails (up to 20 segments total) and three subpopulations with header swaps
<b>Additional Segmentation</b>	50 additional segments to be used for any campaign
	<b>Total:</b> <b>\$182,700</b>

## Darted Application Status Portal

- One Slate query library to define applicant statuses and populations
- Custom CSS styling, HTML, and necessary Javascript based on brand standards
- Home Page containing portal elements:
  - Navigation bar
  - Welcome text (customized per status)
    - Darted for admitted and deposited students
  - Visual representation of Application Status
  - Application details section (e.g., start term, intended major, application status, etc.)
  - Up to three test score displays
  - Custom application materials checklist section
  - Custom upload materials section
  - Custom decision release section
  - Custom post-admission checklist section
  - Custom payment section
  - Portfolio Widget (via Slate-hosted functionality)
  - Application proof
  - Contact Us section (with staff assigned or general contact info)
  - Resources section (up to 5 external links)
  - Event registration section with student's current registration and up to 2 event categories per population
  - One priority event call out section template
  - Social links
  - Account Tools
  - Application selector Widget (via Slate-hosted functionality)
  - Application submission confirmation Widget (via Slate-hosted functionality)
  - Footer
- Update Info Page containing portal elements:
  - Update Contact Info form
  - Deferral and/or Withdrawal Request form

### APPLICATION STATUS PORTAL PACKAGES AND SUPPORT

#### BASIC

- *Designed to serve one population (e.g. Undergraduate, Graduate, Non-traditional) with up to three segments.*
- *20-week project duration*
- *Up to six project calls*

**\$27,000**

### Application Status Portal Enhancements

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

- Decision released splash screen
- Financial aid dynamic content
- Up to three calls to action
- Self-service post-admission checklist form
- Up to three material displays (e.g., transfer credit evaluation, scholarship letters, etc.)
- Up to three FAQ displays (not including creation of questions and/or topics)
- Variable academic content
- One custom media display
- One pop-up photo/video/notification
- Custom enhancement

# | Slate Investment

Service	Scope of Work Summary	Cost
<b>Slate Communications</b>	Custom full cycle Slate Communication bundle included refreshed, dart-segmented, and new campaigns. Also includes additional segmentation to be used for campaigns.	<b>\$182,700</b>
<b>Slate Executive Audit</b>	One 75-minute discovery call, one 75-minute project call reviewing outline and summary of audit findings and recommended priorities and one 75-minute post-summary call. Assessment will include two priority Slate Modules (Deliver & Rules & Automations)	<b>\$25,000</b>
<b>Slate Portal</b>	Custom Application Status portal segmented with Darts designed to serve one student population.	<b>\$27,000</b>
	<b>Total:</b>	<b>\$234,700</b>