



Search + Inquiry Campaign Management

Fort Lewis College

CARNEGIE



Jenna Gilbert
Director of Admission
Fort Lewis College

Dear Jenna:

Thank you for the opportunity to submit a proposal for Student Search!

The project-at-hand has far-reaching potential for Fort Lewis College. It's an opportunity to fundamentally change the way that you think about enrollment strategy and Student Search. And we believe that we're uniquely positioned to partner with you on this transformation. Working with Carnegie, you'll:

Embrace a philosophy and approach that is markedly different and fundamentally better than the prevailing standard. Carnegie Student Search is counter to the traditional high-volume, high-cost, low-conversion Student Search of the past. Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks to who they are as individuals.

Have a partner who knows you well. Having worked closely with you over the years on CollegeXpress lead generation, we're armed with insights about Fort Lewis College. We already see ourselves as an extension of your team. And we're deeply invested in your success.

Tap into an unmatched depth and breadth of relevant experience. We've completed similar projects at Colorado School of Mines, Oglethorpe University, York College of Pennsylvania, Georgia Southern University and more. Complementing the talents of your team, we'll apply our best collective thinking to the goals and opportunities at Fort Lewis College.

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

Now, let's go!

Ryan Ostendorf
Director, Client Success
rfp@carnegiehighered.com

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Executive Summary

Your goals are our goals

Your RFP reflects your desire for new, differentiated, and more effective strategies.

Fort Lewis College is seeking a strategic partner to provide a modern Student Search and engagement solution that combines traditional Search strategies with Digital marketing and social media.

We understand that you need to:

- + **Grow new student enrollments** over the next few years through a stronger inquiry pool.
- + Focus on **increasing enrollment to 850–900** per incoming class.
- + Integrate data within FLC's **Slate** instance.
- + Maintain and enhance **the geographic, socioeconomic, and programmatic diversity** of FLC's inquiry and applicant pools.
- + **Reach prospective students earlier** in the college selection process.

Together we will collaborate

Deploy a Modern, Yield-Focused Student Search

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

We will create a solution designed to:

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

Pillar	Service	Scope of Work Summary
ENROLLMENT STRATEGY CONSULTING		Your Enrollment Strategist will work with our subject matter experts and specialists to ensure a seamless integrated execution of your strategy.
PROSPECT ACQUISITION STRATEGY	Premium Name Buy Consultation	Our team will review historical enrollment trends, market-by-market demographic factors key to your identification of prospects, and existing draw to list and score multiple potential locations for expansion of your efforts.
	Database Access	Deploy an always-on strategy, for year-round inquiry delivery through CollegeXpress. Our student database is free and accessible to all students.
	Market Opportunity Indexing	Identify your best target markets for enrollment. Together we'll use these insights and your strategic goals to inform your Student Search decision making.
TRANSPARENT CRM EXECUTION	Year-round Communications	Inclusive of campaign set-up, list management, attribution and tracking, email marketing, performance reporting, data import/export mapping, and creative. Campaigns include: Senior Search, Underclassman Search, Application Generation, Incomplete Application-Awaiting Submission Campaign, and Incomplete Application-Awaiting Materials Campaign.
PSYCHOGRAPHIC SEGMENTATION	National Student Profiles (Motivators)	Utilizing proprietary methodology, we will tag your prospect and inquiry lists with what psychographic motivator they will most resonate with to guide your communication segmentation strategy.
PERSONALIZED CREATIVE	Psychographic Multi-channel Creative	Designed with Motivators in mind, segmented by those profiles, and delivered as one unified experience. Email, print, digital ads, and landing pages.
TARGETED DIGITAL MARKETING	List-based Tactics	In alignment with your search communications, and your partnership with Advanced360, we will develop a list-based campaign leveraging IP Targeting and Snapchat to a subset of your lists.
YIELD STRATEGY	Engagement Scoring	Data-driven intelligence that maximizes your resources and results. Using geo-demographic data we assign a probability of application to each student.
	Retention Modeling	Assign a retention probability to each student in your admitted or enrolled class.

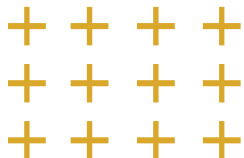
Company Overview

Company and Main Contact Details

Contract + Special Provisions

The Fort Lewis College Contract and Special Provisions would be first in the order of contract precedence should Carnegie be awarded the RFP.

Additional Carnegie terms and conditions to be provided in project-specific contract.



Carnegie

(Carnegie Dartlet, LLC)

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Carnegie at a Glance

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

Higher Education Marketing and Enrollment Strategy

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

The Power of Human Connection

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

Custom Solutions

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

Integrated Services for Marketing and Enrollment

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

1985

The year our company was founded

41

The number of states that we call home

341

The number of Carnegie team members across the country

12

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

11

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

700

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

3

The number of major conferences that we host every year

3

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

25

The number of major conferences we present at annually

Comprehensive Services

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



BRAND STRATEGY

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



DIGITAL MARKETING

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



ENROLLMENT STRATEGY

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



FINANCIAL AID OPTIMIZATION

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



INTEGRATED RESEARCH

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



LEAD GENERATION

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



MARKETING STRATEGY

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



PERSONALITY ASSESSMENTS

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



SIGNATURE CREATIVE

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



SLATE OPTIMIZATION

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



STUDENT SEARCH

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



WEBSITE DESIGN AND DEVELOPMENT

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

Project Team Staffing



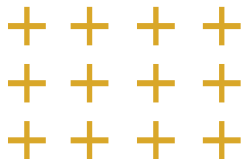
One team, your team.

Human Connection is what gets us up in the morning.

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

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

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



Your key contacts.



CLIENT SUCCESS LEADER

The intentional concierge to your Carnegie experience will be with you every step of the way working to ensure that our ongoing efforts align with your top priorities and Student Search goals.



ENROLLMENT STRATEGIST

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



ACCOUNT MANAGER

Comprehensive partnerships require meticulous attention to detail. Your Account Management Lead will ensure regular calls and communication and adherence to established timelines.

Focused Expertise

Beyond your core contacts: you'll have a team of experts working on your campaigns and directly accessible to you throughout our partnership. Digital and CRM/communication strategists with deep industry experience, world class graphic designers and writers, Web experts, and Financial Aid analysts all will be working as your team to ensure success.



Ryan Ostendorf
Director, Client Success

Supporting clients across all of Carnegie's solutions and services, Ryan Ostendorf brings collaboration, energy, and empathy as he works with clients to streamline and transform their enrollment and marketing strategies. Ryan carries a wealth of knowledge around Slate optimization and brings a unique skillset to help clients leverage and integrate their overall enrollment and marketing strategies. Prior to Carnegie, Ryan worked within admissions, communications, and marketing at the College of Wooster, helping to enroll some of the largest and most diverse classes in the College's history.



Elizabeth Bross
**Executive Director of Enrollment Data,
Strategy, and Analytics**

As the Executive Director of Enrollment Data, Strategy, and Analytics for Student Search at Carnegie, Elizabeth develops comprehensive Student Search programs. With 10 years of experience in higher education and a background in data science, Elizabeth translates complex enrollment information into actionable insights and crafts customized data-driven strategies that support client goals and optimize enrollment outcomes. She also collaborates with the data team to identify and implement best practices for effective and efficient campaigns that meet the unique aspirations of each client.

Meet Your Leadership Team

CARNEGIE



Mike Matthews
EVP, Enrollment & Data Services

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



Alexa Poulin
Chief Digital Officer

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



Ian Strawn
VP, Creative

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



Katie Sentissi
VP, Digital Strategy

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



Jess Severt
AVP, Slate Communications

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



Mike Keane
SVP, Modeling + Client Strategy

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

Scope, Approach, and Methodology

A Modern Approach to Student Search

Always-on, data-driven, yield-first.

Our Student Search is counter to the traditional high-volume, low-conversion Student Search of the past. Your Student Search will be built on the student's terms: when they are ready, where they want to connect, and with messaging that speaks directly to who they are as individuals.

This Student Search is focused on yield.

Our philosophy is to recruit yield always in mind.

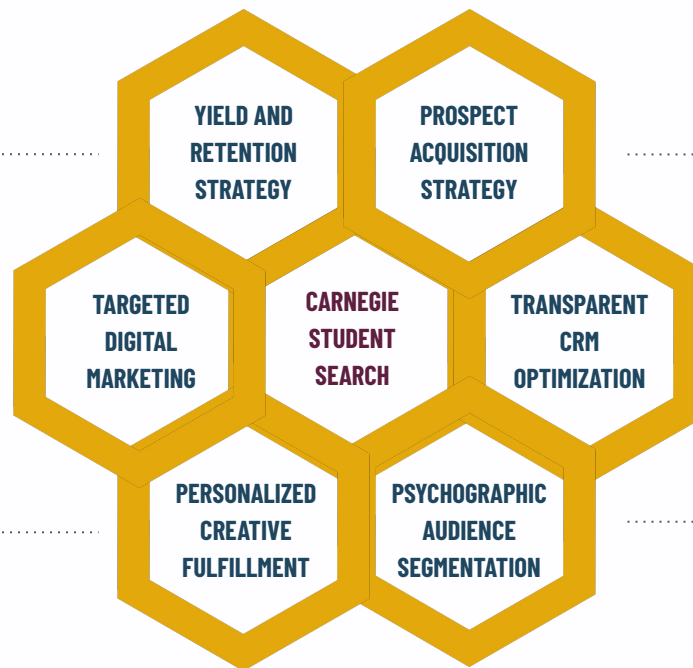
- + **Focus on fit** You'll focus time and energy on where it matters most: recruiting the best-fit students starting with strategic name buys.
- + **Differentiate** You'll capture attention and build human connection with psychometric segmentation and personalized creative.
- + **Always on/Digital-First** You'll meet students where they are and when they are ready with digital marketing and dynamic communications.
- + **Diversify** You'll diversify your lead generation with digital ads, robust form strategy, and student database access.
- + **Leverage the Power of rich CRM data** You'll gain data transparency and we'll ensure that your data is transferred with the rich data collected along the way.

Carnegie Student Search

This is data-driven decision making at its best. We identify who is most likely to apply, what amount of aid a student needs to enroll, and who needs intervention in order to retain. For Carnegie, Student Search strategy is retention strategy.

We'll deliver the right message to your Student Search list at precisely the right time. You'll be supported by a digital team with unparalleled experience who will ensure your results.

We work across print, web, social, and digital channels to bring your authentic personality to life for your audiences in ways that inspire and move them to action.



We help you source, identify, and cultivate students who are best-fit for your institution, through a student-centric, market-mindful model that emphasizes yield and optimizes your Student Search budget.

Your Student Search will be fully transparent, fully optimized, and fully supported; and what's more, you own it! We will deliver a return on investment you won't find anywhere else.

Our archetype-based personas use psychometric data to deliver advanced segmentation and truly personalized communications.



Enrollment Strategy Consulting

Student Search needs a constant hand on the wheel—we provide that steady hand to ensure your success. We will begin by building a custom Student Search Strategy for Fort Lewis College based on our wealth of experience, best practices and alignment with your goals. Your Enrollment Strategist will work with our subject matter experts and specialists to ensure a seamless integrated execution of your strategy. They will know your campaigns, review performance data and make sure to bring optimizations and insights to your discussions. You will benefit from our channel specialists and also have a main point of contact for strategic pivots, questions from the board, and performance reviews.

BENEFITS OF CARNEGIE STUDENT ENROLLMENT CONSULTING:

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

We help you source, identify, and cultivate students who are engagement inclined for Fort Lewis College, moving away from the traditional high-volume, lower-conversion Student Search of the past and toward a more innovative and student-centric, market-mindful model that emphasizes yield while optimizing your Student Search budget.



Prospect Acquisition Strategy

Market Opportunity Indexing

Bolt on rich and predictive datasets to your enrollment data to identify your best target markets for enrollment.

Premium Name Buy Consultation

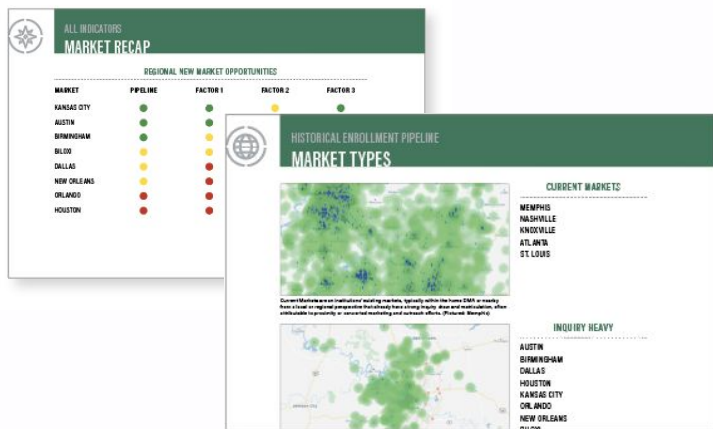
We will deliver a name purchasing model based on your enrollment data and market intelligence analysis to ensure that your selections are precise and have the highest likelihood of conversion.

Student Database Access (CollegeXpress)

You need student names. We offer a reliable student name source to augment your list strategy for Student Search. Deploy an always-on strategy, for year-round inquiry delivery. Our student database is free and accessible to all students.

MOI: Market Opportunity Index

Always-on, data-driven, yield-first.



- + Leverage this data-driven market knowledge in strategic name purchases, territory management and travel planning, and digital spend prioritization—to name a few benefits.
- + Access rich data like household income, racial diversity, and high higher ed index for opportunity identification, audience prioritization, and marketing execution.
- + Lean on our team of consultants to bring identified opportunities and your strategic plans in line for maximum impact.

Strategic name buy consultation

Always-on, data-driven, yield-first.

Combining the results of the MOI, this is the smartest way to expand your reach and to realize your Student Search potential. Bolt on rich datasets to your enrollment data to identify your best target markets for enrollment. Together we'll use these insights and your strategic goals to inform your Student Search decision making. This is data-driven decision making at its best.

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

Prospective student database access

Always-on, data-driven, yield-first.

You need student names. As you are aware from our current partnership, we offer a reliable student name source to augment your list strategy for Student Search. Our solution is CollegeXpress—The most comprehensive, multichannel, recruitment tool available to colleges and universities. As part of this search proposal, we will incorporate your current CollegeXpress contract into our search offering.



- + Deploy a year-round inquiry lead generation and delivery with access to over 6 million users.
- + Build an ongoing and strong multi-cycle pipeline from freshman to seniors.
- + Shape a diversified student pool—CollegeXpress is free and accessible to all students.
- + Attract hand-raisers with targeted email marketing and on-platform digital advertising.
- + Segmentation from gender and geography to academic interest and aptitude.
- + Directly upload qualified inquiries into your CRM, including data mapping, origin source set-up, and future performance reporting.

Your Student Search will be optimized, fully-supported, and will deliver a return on investment you won't find anywhere else.



A Transparent Student Search

Campaign Set Up

Your content and messaging strategies alongside campaign designs will be fully implemented by the best CRM team in the entire industry.

Data Transparency

You will own all of your data, commflows, and frequencies. We will make sure you have all the rich data from your Student Search efforts at your fingertips to make any adjustments.

Fully Supported

Lean on us for the full implementation of your Student Search email campaigns, reports, and ongoing consulting on your integrated strategies to realize goals.

Prospect to Inquiry Campaigns

Underclassmen + Senior

Campus visit focused messaging for pre-applicant students

Application Generation Campaign

Messaging driving submission, and application completion.

Transparent CRM execution

Always-on, data-driven, yield-first.

A transparent Student Search empowers you to take ownership of your Student Search, while also providing the expert support you deserve. Your Student Search will be seamless, optimized, fully-supported, and will deliver a return on investment you won't find anywhere else.



Technolutions' first Slate
Platinum Preferred Partner

- + Built entirely in your instance—by the best Slate team in the industry:
 - + List management and segmentation
 - + Attribution and tracking
 - + Email marketing
 - + Real-time reporting
 - + Print Management
- + Own ALL your data, securely in your system—no data transfers needed.
- + Lean on us for the full implementation of your Slate Student Search and ongoing consulting on your Student Search strategy:
 - + On-going support provided via regular calls addressing campaign performance and optimization recommendations.

Deliver the personalized experience students are asking for and stand apart from your competition.

By combining student demographic and psychographic data—like personalities, motivations, and beliefs—we deliver student profiles and custom audience segmentation which ensures your Student Search campaigns capture attention.



Psychographic Segmentation

Cut Through the Noise

More volume is not the answer. With fewer students receiving more communications from more institutions, it's time to target the student and the message.

Personalize Content

Our proprietary, archetype-based personas use psychometric data to deliver advanced, custom, variable, and truly personalized communications to your audiences.

Engage at the Prospect Level

Demographics help us locate students, but psychometrics give us the intel on what to say. Even at the prospect level, we can create content strategies that get at student interests and motivations.

Psychographic Segmentation

CARNEGIE MOTIVATOR

Your audience expects more from your Student Search communications, and with advanced segmentation, you can deliver the personalized experience they are asking for and stand apart from your competition. By combining prospective student demographic data and psychographic data—like personalities, motivations, and beliefs—we deliver turnkey student profiles and custom audience segmentation.

- + Deliver truly personalized communications with Psychometric segmentation—only found at Carnegie.
- + Tagged with 3 National, turn-key profiles, your names are ready for segmentation and variable content strategies.
- + Lean on our creative team to write and design communications personalized with your student Motivators.
- + Variable email, digital ads, print, and landing pages.
- + Integrated into your CRM, Motivator profiles offer sophisticated yet simple reporting and communication segmentation.



We work across print, web, social, and digital channels to bring your authentic personality to life for your audiences in ways that inspire and move them to action.



Personalized Creative

Creative Fulfillment

Recruit to retain by delivering creative throughout the enrollment cycle with a clear and concise message that is authentically you.

Psychometric and Multi-channeled

Whether through email drips, print pieces, digital tactics, or web pages and portals we deliver unique and personalized creative that is consistent, elevating your brand presence and increasing engagement.

Website Personalization + Attribution

On site text and image customization/Full lifecycle tracking.

Motivator-driven creative production

Sometimes good research gets a bad reputation for not being actionable. The Carnegie Motivator bucks that trend because it was designed to be one of the most unique and versatile variables in your CRM.

The Carnegie Motivator is designed to alleviate the stress of fixing a voice to your message and matching that voice to an audience. Any comm-flow to students can be segmented by the optimal personality lens. While the nuts-and-bolts message of a student touchpoint could be the same (for example, an email about your early admission process), key images, words, and topics can be tailored to each motivational segment.

- + Deploy a unified, multi-channel creative and fulfillment.
- + Get strategic recommendations on print communications, in order to maximize your print budget.
- + Set your institution apart from competition with creative designed for your student Motivators.
- + Lean on our communication strategists for optimized fulfillment.
- + Fully executed underclassman and senior Student Search—in your instance.

We'll deliver the right message to your Student Search audience at precisely the right time. You'll be supported by a team with unparalleled experience who will ensure your digital Student Search efforts get great results.



Targeted Digital Activation

Lis-based Digital Targeting

Focus on yield by meeting students where they are, and continuing to be accessible with a full life cycle, always on strategy.

Integrated with our Market Intelligence, Audience Segmentation, and Slate reporting, your digital execution will be precise and effective.

List-based Digital

We'll deliver the right message to your Student Search list at precisely the right time.

Your campaigns will be supported by the best team in the business, who will ensure your digital Student Search is first-class. Fully integrated with our Market Intelligence, Audience Segmentation, and Slate reporting, your digital execution will be precise and effective.



- + Deploy a strategic approach in alignment with your communications strategy and partnership with Advance 360.
- + Leverage precise targeting, at home and on mobile devices.
- + Access and influence stakeholders online.
- + Present a unified brand experience from digital to print.
- + Integrate Slate landing pages for:
 - + Real-time inquiry tracking in your CRM
 - + Automated communication triggers

This is what we call data-driven decision making at its best. We work to identify students who are most likely to apply, exactly what precise amount of aid an individual student needs to enroll, and who might need intervention in order to retain. This is where your Student Search strategy becomes your enrollment strategy, and you recruit to retain.



Yield and Retention Strategy

EnGauge Apply Scoring

Custom modeling that combines student-level attributes, third-party geodemographic and consumer behavioral data, and rich data on your prospects' own engagement with your institution to produce a score that captures the likelihood that each student will convert to an applicant.

Retention Modeling

Assign a retention probability to each student in your admitted or enrolled class.

Individual Financial Aid

Money matters. It's your number one yield tactic, which is why it ought to be precise. We deliver individual aid strategy—not only customized for your institution, but customized for every student.

EnGauge Apply Score

We are scoring student's propensity to apply by measuring their engagement with your institution.

EnGauge Scores are a feature of Carnegie's Student Search solution. The EnGauge Apply Score is the powerful combination of behavioral data (or affinity data) and our Lead Score (geodemographic information). The EnGauge Apply Score can be used to make strategic decisions about how you deploy your resources—where exactly to spend your time and money in your student recruitment efforts. These strategic optimizations will lead to increases in conversions throughout the recruitment cycle.

- + Identify and prioritize highly-engaged prospects.
- + Focus your resources on the students who need contact to convert.
- + Inform communication segmentation, recruitment and marketing plans, and intervention tactics.
- + Lean on our team of consultants to deliver the data as well as the action plan.
- + Increase engagement and conversions throughout the student enrollment journey.

Retention Modeling

Another opportunity to effect change with better data.

*Retention Modeling assigns a retention probability to each student in your admitted or enrolled class. With this data, you have the opportunity to apply interventions like additional aid, advising, or counseling services which will **increase your ability to retain at-risk students.***

- + Know each student's likelihood to persist and retain.
- + Use this rich data to focus resources on the students who need the most support.
- + Lean on our team to analyze data and inform strategies.
- + Decrease melt and increase retention.
- + Leverage this tool as early as the admit stage or later in the first year of enrollment.

Financial Aid Optimization Capabilities

Individualized Financial Aid

No more oversimplified, generic grids—leverage a financial aid model that is built for you. Make in-cycle optimizations while you monitor and adjust based on performance and desired outcomes.

- + Know each student's greatest likelihood to persist and retain.
- + Match each student to an aid award that maximizes their enrollment probability.
- + Deliver financial aid awards that are precise—don't over or under spend.
- + Maximize rich data to focus on students who need the most support.
- + Improve yield with integrated, start to finish Carnegie solutions and strategies.
- + Allow integrated goals to inform aid strategies.

Carnegie FAO Differentiators

No more oversimplified, generic grids—leverage a financial aid model that is built for you. Make in-cycle optimizations while you monitor and adjust based on performance and desired outcomes.

1. We begin with Net Tuition Revenue maximization.
2. We integrate first-year retention modeling directly into every project.
3. We include application conversation modeling with each project.
4. We utilize institutional, external, and proprietary geodemographic data.
5. Mid-cycle adjustments made possible through the use of a live simulation dashboard.

Proposed Schedule

Our Proposed Process



DISCOVER

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

Key activities will include:

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



STRATEGIZE

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

Key deliverables will include:

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



ACTIVATE

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

Those assets will include:

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



MEASURE

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

Reports will include:

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



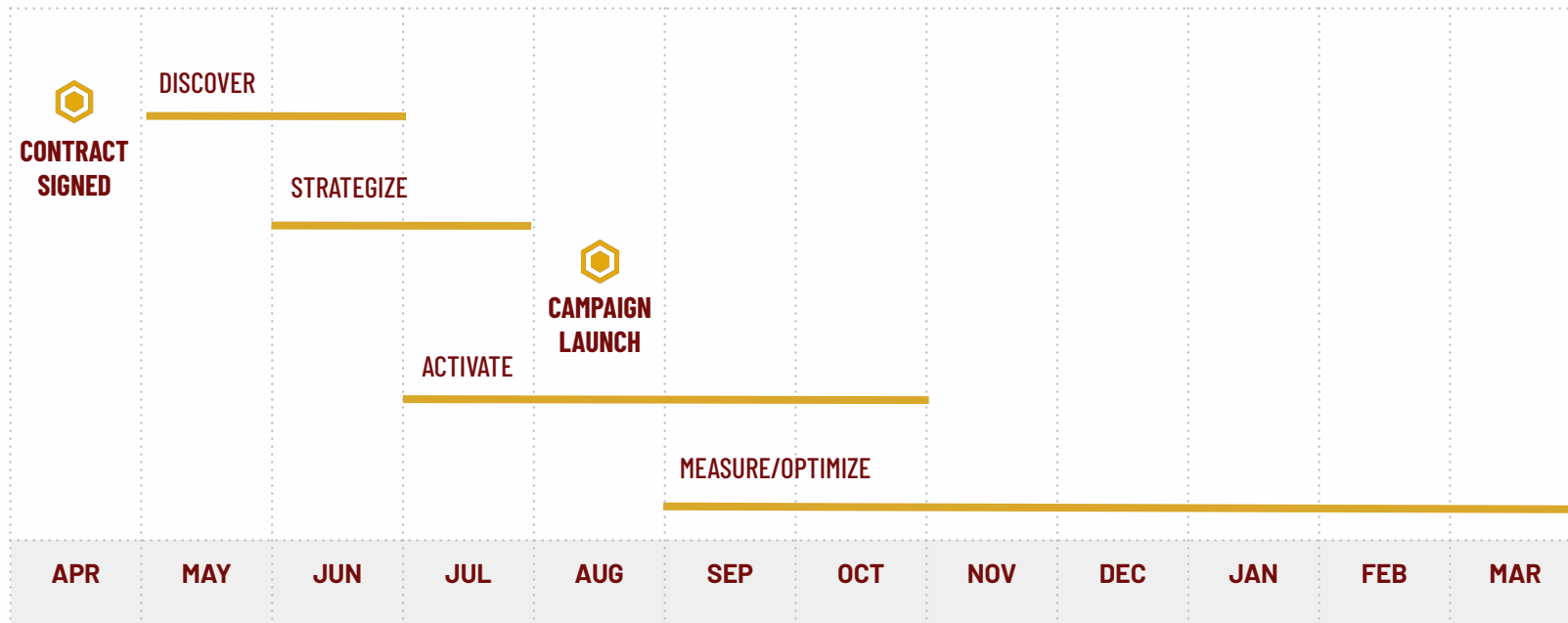
OPTIMIZE

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

Support will include:

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

Carnegie Student Search Timeline



Pricing

Annual Investment

INVESTMENT	Carnegie Services	Estimated Print Costs*
TOTAL ANNUAL INVESTMENT 1 YEAR AGREEMENT	\$345,435/year	\$30,500/year
TOTAL ANNUAL INVESTMENT 2 YEAR AGREEMENT	\$338,253/year	\$30,500/year
TOTAL ANNUAL INVESTMENT 3 YEAR AGREEMENT	\$331,070/year	\$30,500/year

Our solution is scalable based on further conversation around your needs.

**More details below*

SAMPLE COST ESTIMATE (Slate Print)

While we typically recommend Slate Print, we can also work with other preferred printers as requested or needed by Fort Lewis. Note postage estimates are based on nonprofit standard postage rate.

Piece	Quantity	Total Cost (print + postage)
Senior Search Postcard	20,000 (digital)	\$8,600
Underclassmen Search Postcard	50,000 (offset)	\$19,500
Application Generation Postcard	5,000 (digital)	\$2,400
	TOTAL	\$30,500/year

Acceptance Period

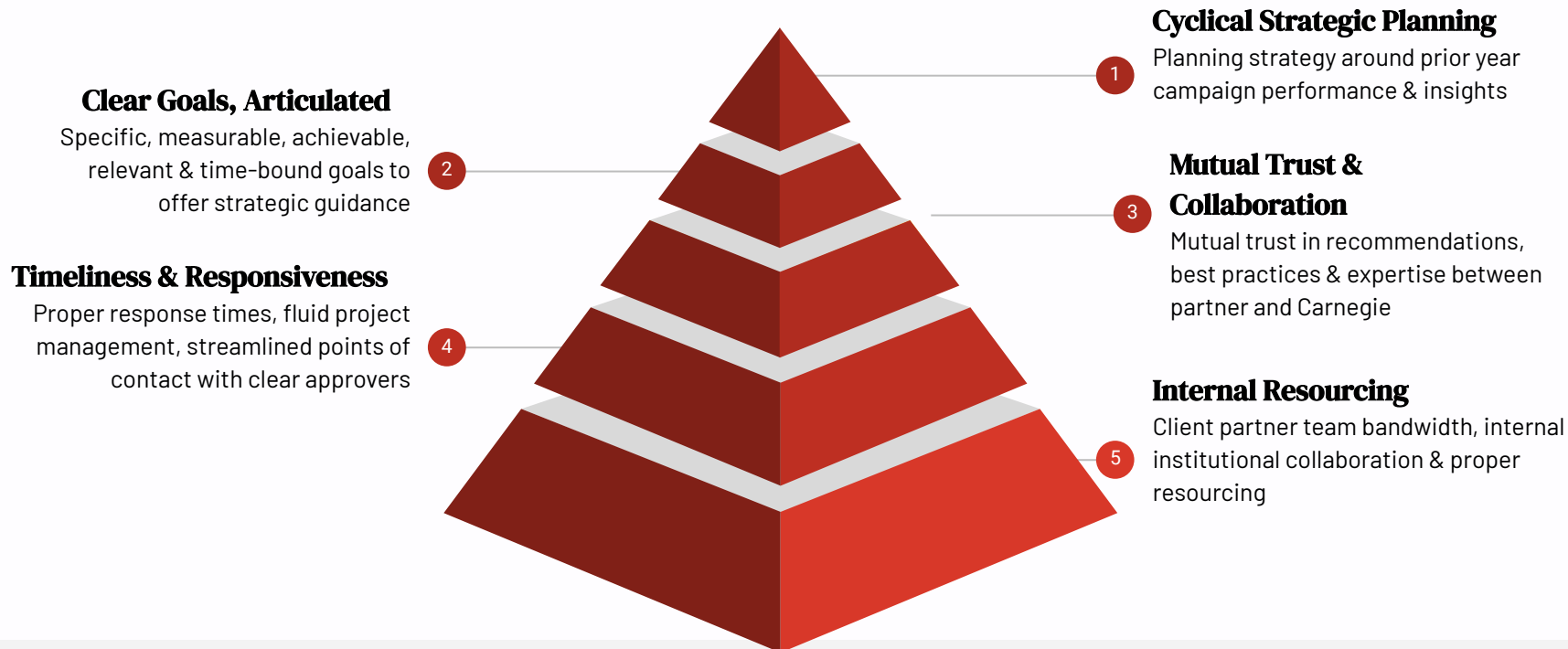
Partnership Expectations

A mutual commitment and platform for accountability

- + In all our communications we commit to being **responsive and timeline-minded**, setting realistic expectations and paying attention to dependencies.
- + In our discovery and planning conversations, we commit to being **transparent and collaborative**, recognizing that our solutions are most effective when we all understand the full scope of complexity of each challenge.
- + In feedback sharing, we commit to being **clear and decisive**, ensuring that the feedback is actionable and we're accountable to the downstream effects of those decisions.
- + In choosing to partner together, we will be **confident in each other's expertise**, and in doing so, giving respect to all team members, withholding premature judgement, and being receptive to new ideas.

Partnership Expectations

Carnegie's Hierarchy of Integration



| Case Study + References

Gettysburg College

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

Gail Sweezey

Dean of Admissions,
Gettysburg College

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

+ The Strategy

Gettysburg, a long-time partner of Carnegie, knew that to be competitive in their marketplace, they needed to better understand their market and how best to communicate the value of a Gettysburg education. Gettysburg’s enrollment and marketing leadership came to Carnegie with a new strategic plan and some new ideas about how they might connect with prospective students—but they wanted to test their plan in the market. Together, Carnegie and Gettysburg rolled out a custom research project comparing Gettysburg’s standing amongst its competitors. This project provided invaluable insights into the themes and messages that would not only attract students but also distinguish Gettysburg from the competition. With these findings, Gettysburg launched a new messaging campaign in December of 2022.

CARNEGIE

4%

increase in YOY inquiries

23%

increase in submitted
applications YOY

3%

increase in admits YOY

86%

increase in new website visitors

15%

admit/matrics sourced via
CollegeXpress

To broaden its reach and make a lasting impression, Gettysburg expanded its paid digital strategy to include a blend of SEO, PPC, IP Targeting, and social media platforms, including Facebook, Instagram, Snapchat, YouTube, and OTT into its marketing mix. The implementation of GA4 and Carnegie Clarity played a critical role in this phase, ensuring optimal investment returns through precise measurement, attribution, and enhanced on-site personalization. This holistic digital strategy paid off, with a remarkable 86% increase in new site visitors, 69% of which were directly attributed to Carnegie-Gettysburg campaigns. A key component of Gettysburg and Carnegie's multi-layered marketing + enrollment strategy was the focus on inquiry acquisition through CollegeXpress, Carnegie's student database and lead generation platform. This initiative proved successful, with 15% of Gettysburg's admitted students and 9% of those who deposited being sourced through CollegeXpress.

Further integrating their strategy, Carnegie leveraged Gettysburg's Slate instance to launch Sophomore, Junior, and Senior Student Search communications. Carnegie's Slate team designed Slate communications campaigns in the client's instance, giving Gettysburg real-time insights into campaign performance and rich behavioral data about their potential incoming class. This integrated marketing and enrollment effort helped Gettysburg achieve its 2023 enrollment goals.

The Results

Carnegie's partnership helped Gettysburg reach and engage its prospective student audience, as demonstrated by digital, communications, and inquiry-sourcing outcomes. Overall Gettysburg saw a 4% increase in YOY inquiries, a 23% increase in submitted applications YOY, and a 3% increase in admits YOY. Gettysburg also saw an 86% increase in new website visitors, with 69% of website traffic through marketing campaigns attributed to Carnegie. CollegeXpress generated strong engagement as demonstrated by its role in Gettysburg's inquiry pool, with CollegeXpress leads making up 15% of admit/matrics, and 9% of deposits pending for Fall 2023.

References

Gail Sweezey

Dean of Admissions

Gettysburg College

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Gettysburg, PA

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Scope of Work:

Gettysburg College works with Carnegie for full-funnel Student Search, in addition to CollegeXpress lead generation and admitted student research. Carnegie's partnership has helped Gettysburg reach and engage its prospective student audience, as demonstrated by digital, communications, and inquiry-sourcing outcomes.

Jason Black

*Vice President for Enrollment
Management*

Samford University

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Scope of Work:

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

Alejandra C. Sosa Pieroni

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

Georgia Southern University

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Statesboro, GA 30458

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Scope of Work:

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

CARNEGIE

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