



CARLOW
UNIVERSITY

**Request for Proposal
For Strategic Marketing Partnership**

2-26-2020

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I. About Carlow University

Mission

Carlow University, rooted in its Catholic identity and embodying the heritage and values of the Sisters of Mercy, offers transformational educational opportunities for a diverse community of learners and empowers them to excel in their chosen work as compassionate, responsible leaders in the creation of a just and merciful world.

Overview of the University

Carlow University is a small, private, Catholic coeducational university. Founded by the Sisters of Mercy, the University has a strong commitment to social justice, academic excellence, and student success. It has more than 40 undergraduate and 35 graduate and certificate programs. Within six months of graduation, 97 percent of its graduates are employed or enrolled in an advanced degree program. Located in the heart of Pittsburgh's innovation district, it boasts a 12:1 undergraduate student-to-faculty ratio and experiential learning opportunities and internships through regional partnerships. Popular degrees include nursing, education, art, social work, and psychology. Carlow provides transformational learning experiences that empower graduates to become forward-thinking, ethical leaders who give back and make a difference in the world.

Carlow's 13 athletic teams are known as the Celtics, a reflection of the university's Irish heritage and roots.

Address

3333 Fifth Avenue
Pittsburgh, PA 15213

Website

www.carlow.edu

Phone

412-578-6000

II. Partnership Overview

Carlow University is in need of a new strategic marketing partner to assist with building our recruitment funnels for Traditional, Adult (Post-Traditional), and Graduate Students. Carlow is seeking a partner to provide marketing services to increase brand awareness, application submission, and enrollment growth.

A. Background

Carlow University has made a commitment to accelerate our adult and graduate growth while looking to stabilize our traditional student enrollment. The University is laser focused on supporting the needs of the future 2025 student. In order to accomplish this, we will need to execute a comprehensive enrollment and marketing plan to accelerate growth. We are also seeking to invest in our signature programs while exploring new programs that align with mission and regional needs.

Carlow University is currently building a new website set to launch in the Fall of 2020.

B. Strategic Marketing Partnership Expectations

Carlow is seeking a partner that meets all of the following expectations:

1. Brand
 - a. Understand Carlow's background, mission, vision, values and brand.
 - b. Research and provide insight into Carlow's brand awareness and reputation.
 - c. Support the scaling of Carlow's branding, positioning strategy, narrative, and tagline while adhering to current visual brand identities.
2. Marketing
 - a. Understand student demand and the competitive market in order to drive continuous extensive market research and program strategy founded in best practices of higher education.
 - b. Define our different audiences and develop a targeted approach to engage them. Our audiences include traditional, adult (post-traditional), and graduate students as well as parents and other key influencers.
 - c. Recommend and implement solutions to assist the university in achieving enrollment goals and increasing student footprint beyond the region.
 - d. Develop strategic campaigns to elevate signature programs while understanding seasonality of the programs and target audience to ensure campaign effectiveness.
3. Partner Services
 - a. Provide all services in-house resulting in effective communication, consistent service, and accurate pricing.
 - b. Execute a multi-channel marketing campaign containing traditional and technological efforts that may include but is not limited to website, paid search, print, email marketing, social media, video, radio, retargeting digital and text.

- c. Research and provide to Carlow keywords to be used in marketing campaigns and on our website.
- d. Understand the inclusion and utilization of Carlow's website throughout implemented marketing campaigns.
- e. Drive strategy with key KPIs and ROI measurement using reliable tracking tools and/or Carlow's Google Analytics.
- f. Share and report consistent data transparently by using Carlow accounts, or allowing Carlow to access the chosen tracking tool or analytics at any time.
- g. All deliverable subject to WCAG 2.1 AA standards, meet and/or exceed those standards.
- h. Provide cookie and privacy policy guidance and support.
- i. Understand and able to integrate with Technolutions Slate (Carlow's CRM).
- j. Provide detailed monthly invoices outlining the month's work completed.

C. Client Performance

Please provide the following information to illustrate your relationship and services provided to your existing clients:

1. Case Studies: Provide at least two case studies that showcase the performance of your clients. Case studies of small, regional institutions similar to Carlow are highly preferred. For each, provide detailed information that may include the following:
 - a. History of the relationship (length to date; per contract)
 - b. Enrollment & revenue growth (by year, by program)
 - c. Key marketing elements— market analysis, online vs offline marketing, lead generation and conversion data.
 - d. Other qualitative outcomes/benefits that the university has received as a result of the partnership
 - e. Across all clients what are the average campaign response rates, increase in applicants, and increase in enrollment during first year of partnership.
2. References: Please provide the following client references.
 - a. Contact information for three to five institutions of higher education your organization currently works and a brief summary of the scope of work. (references from small, regional institutions similar to Carlow are preferred)

D. Vision for Carlow

Please provide a clear and unique vision for Carlow over the course of the partnership with your organization. Your vision may include the following specific details:

1. Why are you interested in working with Carlow?

2. What are, or could be, Carlow’s key competitive advantages and differentiators in the market?
3. Initial thoughts on the Carlow brand today, and how it might evolve in this partnership.
4. Describe the ROI this partnership will generate for Carlow.

E. Timeline

1. Selection of vendor

Milestones	Dates
Release of RFP	2/26/2020
RFP Responses due by 5 p.m. EST	3/13/2020
Notification of 3 finalists	3/23/2020-3/27/2020
Presentation/Finalist Interviews	3/30/2020- 4/15/2020
Selection and Notification	5/1/2020

2. Partnership begins:
July 1, 2020

F. Key Carlow University Personnel

Name	Position
Mollie Cecere	Vice President for Enrollment Management and Marketing
Sarah Norris	Social Media Manager
Beth Fazzini	Senior Director of Marketing and Brand Management
April Gratton	Web Content Manager
Heather Farah	Procurement Specialist

G. Budget

\$350,000- \$500,000 per year (includes advertising spend)
Anticipated 3-year engagement

H. Notification of Intent to Submit Proposal

Respondents who plan to submit a proposal must submit the Notification of Intent to Submit Proposal form on page 11 to procurement@carlow.edu no later than **March 6, 2020 by 5 p.m. EST**

III. RFP Clarification

Respondents may request an explanation of the intent or content of this RFP and clarification of procedures used for this procurement. No interpretations made to any respondent as to the meaning of the RFP shall be binding on the University unless repeated in writing or distributed as an addendum by the University's Procurement Office.

Email questions must be directed to sanorris@carlow.edu such requests must be received no later than **March 3, 2020 by 5 p.m. EST.**

Failure of the respondent to make appropriate inquiries, evaluate any special conditions, or verify requirements of this RFP shall not relieve the vendor of responsibility for fulfilling the contract in accordance with this RFP.

Oral communication with any University employee, unit, department, or organization concerning this RFP is not binding on the University and shall in no way modify the RFP or the obligation of the University or vendor.

A. Addenda to the RFP

In the event that it becomes necessary to revise any part of this RFP, Carlow's Procurement Office will provide addenda in writing to all respondents who submitted a Notification of Intent to Submit Proposal form (page 11).

IV. Proposal Submittal Guidelines

A. Proposal submission deadline

Respondents are asked to submit their proposal no later than **5:00 p.m. EST on Friday, March 13** via email to procurement@carlow.edu with the subject line: Strategic Marketing Partnership for Carlow University.

B. Acceptance of proposals

The University reserves the right in awarding the contract to consider the competency, responsibility, and suitability of the respondent, as well as the services to be provided. The University further reserves the right to accept or reject any or all proposals, to waive any irregularities or informalities, and to award the contract in the best interest of the University. Neither the University nor any agent thereof on behalf of the University will be obligated in any way by any respondent's response to this RFP.

The University also reserves the right to allow a respondent to correct a defect in its Bid provided that the correction of the defect does not alter the amount of the Bid or the scope of work required under the Bid.

Discussions may be held with respondents to promote understanding of the RFP requirements and to answer questions about the oral presentations.

C. Proposal submission

Any term or condition stated in this RFP document shall be considered accepted by the respondent unless specifically objected to by the respondent. The University may accept or reject respondent's alternative terms to this RFP. A proposal may be rejected if it is incomplete or conditional.

To receive consideration, proposals shall be made in agreement with the instructions as stated in this RFP.

D. Preparation

Proposals should provide a straightforward, concise description of the respondent's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

E. Incurred cost

The University is not liable for any costs incurred by the respondent in the preparation and presentation of the proposals.

F. Proposal Format

1. Requirements

- a. Be clear and concise
- b. Use a table of contents for ease in finding necessary information
- c. PDF of a Word document
- d. Contain the following:

2. Title page

- a. Include a title page with signatures of the person or persons required and authorized to legally bind the respondent to the proposal
- b. Specifically state that the respondent shall complete all services set forth in the proposal within the proposed time limits to the satisfaction of the University.

3. Cover letter

The cover letter page shall be on company letterhead and shall contain:

- a. Name and working address of respondent
- b. Name and contact information of the primary company representative to be contacted in reference to the proposal
- c. Date of submission
- d. Brief introduction of the respondent
- e. Brief explanation of why the company is a good fit for Carlow University, acknowledging its mission and audience
- f. Any terms or conditions of this RFP to which the respondent objects and/or does not accept along with any alternatives or further explanation

4. Designated project personnel
The proposal must contain a detailed list of designated project personnel:
 - a. Clearly identified respondent liaison/team supervisor
 - b. Entire team who will be completing the work identified in this proposal
 - c. Each team member's name, title/position and role as it correlates to this RFP

5. Itemized scope of work
The proposal must contain an itemized scope of work containing:
 - a. A detailed list of all services to be provided with succinct explanations
 - b. Projected time to complete each service
 - c. Projected cost of each service

6. Timeline
The proposal must contain:
 - a. Clearly defined and concise timeline
 - b. Communication schedule

7. Campaign samples produced by vendor
The proposal must contain:
 - a. at least two campaign samples the respondent has created to show their qualification in completing this RFP.

V. Proposal Evaluation

A. Proposal Criteria

If all criteria below are met, the proposal has met the minimum requirements to be reviewed and evaluated.

1. Proposals must meet the following criteria in order to be considered:
 - a. Submission by the deadline
 - b. Total cost within the budget range
 - c. Project personnel clearly designated
 - d. Detailed, itemized scope of work
 - e. Detailed timeline for completion of the project

B. Evaluation Criteria

All qualifying proposals will be evaluated by the Strategic Marketing Selection Committee utilizing a rubric system with additional consideration given to qualitative, subjective criteria. The committee will evaluate each proposal based on the factors set forth in this RFP.

1. Criteria
 - a. Minimum criteria as noted above
 - b. Cost effectiveness and value

- c. Clear understanding of the project and partnership goals
 - c. Innovative approach or methodology to successfully meet project's goals
 - d. Necessary qualifications, experience and resources to undertake the project
 - e. Sufficient training resources and personnel dedicated to the project
 - f. Accessibility and compliance knowledge and efficiency
 - g. Organized and written clearly in layman's terms, free of technical jargon

VI. Proposal Presentation

The Marketing Partnership Selection Committee will select 3 finalists who will be asked to present their proposal on campus to the committee and a select group of internal stakeholders.

Once selected, additional information will be provided.

VII. Proposal Award

The University reserves the right to cancel the selection process or the negotiations when a selection is made or at any time prior to entering into a formal written agreement with the vendor.

The University intends to execute a contract with the vendor submitting the proposal which the University determines to best meet the University's requirements. The University will be the sole judge of the acceptance of any and all proposals.

In awarding the contract, the University may take the following into consideration: the references, experience, responsibility, reputation, and the ability of the vendor to provide an advantageous time schedule for providing service. The inability of any respondent to meet the requirements may be cause for rejection of the proposal. The University reserves the right to entertain post-submittal feedback.

After selection approval by the Marketing Partnership Selection Committee, the Procurement Office will generate an agreement to be prepared for signatures by both parties. The decision of the award will be communicated in writing to all respondents and is final.

The University reserves the right to approach any respondent with a "best and final" offer. One or more respondents may be provided an opportunity to submit a "best and final" offer.

VIII. Notification of Intent to Submit Proposal

If you are interested in submitting a proposal, please complete the information below and email to Carlow University's Procurement Department at procurement@carlow.edu no later than **March 6, 2020 by 5 p.m. EST.**

Name of Organization: _____

Mailing Address: _____

Representative's Name: _____

Representative's Title: _____

Email Address: _____

Phone Number: (_____) _____ - _____

Fax Number: (_____) _____ - _____

We will submit a proposal.

Signed: _____

Date: ____/____/____