

RFP – STUDENT RECRUITMENT MARKETING & COMMUNICATION SOLUTION

Amendment 1 – Comments and Questions/Answers

Comment: One of the questions highlighted a typographical error in Attachment 6.5C. That has been corrected, and a revised RFP has been posted to our webpage.

Questions/Comments and Answers

Q1: Is your preference to award to one or multiple agencies, depending on specific specialties?

A1: We are open to both possibilities – awarding to one agency or awarding to multiple agencies. Our decision will be based on what is in the best interest of Tennessee Tech.

Q2: What is the budget for this project for the first-year contract?

A2: We do not have a budget that we can share with Proposers. As noted in Section 3 of the RFP, each Proposer should submit a Proposal with the most favorable terms that they can offer.

Q3: Can you share your anticipated budget for this project?

A3: Please see Answer #2.

Q4: What are the key qualities and capabilities you are seeking in a partner for Student Search Services?

A4: We are seeking a partner who brings a data-informed, strategic approach to student search. Key qualities include the ability to proactively deliver insights and recommendations rooted in predictive modeling and enrollment behavior analytics. We value a partner who goes beyond list procurement. We want someone who acts as an extension of our team, helping us identify and prioritize students with the highest likelihood to apply, enroll, and persist.

Strong partners will demonstrate a deep understanding of regional and national market trends, offer segmentation and messaging strategies tailored to our brand and mission, and provide transparent reporting on performance metrics. We also seek flexibility and collaboration, with a partner who adapts to our evolving goals and offers creative solutions that optimize ROI at every stage of the funnel.

Q5: The RFP mentions the purchase of 60,000 names—could you provide a yearly breakdown and how they're allocated across sophomores, juniors, and seniors?

A5: While we remain flexible in our approach, our strategy is weighted heavily toward senior names to align with immediate enrollment goals. However, we also recognize the importance of early engagement and may allocate a portion of the list to juniors and, to a lesser extent, sophomores, based on campaign needs and budget flexibility. We're open to partner

recommendations on the optimal distribution mix that aligns with predictive yield and long-term pipeline development.

Q6: Are you willing to accept an electronic submission in lieu of the hard copies? If not, will Tennessee Tech accept responses on a USB shipped to your location (no hard copies provided)?

A6: We are requiring one hard copy and an electronic copy of the Technical Proposal, plus one hard copy and an electronic copy of the Cost Proposal.

Q7: Is Tennessee Tech willing to accept an electronic signature in lieu of a wet ink signature on all forms?

A7: Yes.

Q8: Per Section 3.2.7 (RFP p. 9), are digital/electronic signatures acceptable on the hard copy versions of our Technical and Cost Proposals?

A8: Yes.

Q9: Per Section 4.16.2 (RFP p. 12), can vendors submit a redacted version of our Technical Proposal to be available for public release?

A9: No. Any Technical Proposals submitted will become open to the public in an unredacted format.

Q10: Our solution creates greater efficiencies and impact when purchased as an all-inclusive solution. Would Tennessee Tech be open to vendors only completing the “Option Two: Complete Solution” section of the Cost Proposal Schedule, if our pricing does not correlate with the “A La Carte” service categories?

A10: Vendors may complete only Option Two if desired. Please see also Answer #1.

Q11: Is there a budget, authorized amount allocated, or an incumbent performing similar work? If the latter, what is the current contract value?

A11: The incumbent is Capture LLC. Please also see Answer #2.

Q12: If the University determines that a single solution cannot meet all of the requirements or would not be the best-fit, would the University award segments of the scoped work to multiple vendors?

A12: Please see Answer #1.

Q13: For the student search, does the University have existing lead sources? If so, where are they purchased from, in what quantity, and what is their historical yield percentage?

A13: Yes, the University currently leverages a variety of trusted lead sources to support our student search strategy. These include Encoura, Phi Theta Kappa (PTK), College Board, and College Bound Selection Service (CBSS). These partners have been chosen based on their alignment with our academic profile, geographic priorities, and enrollment objectives.

While we do not disclose specific purchase quantities or historical yield data, we actively monitor performance and adjust our outreach strategy as needed to ensure efficiency and impact across the funnel.

Q14: Who is your marketing agency of record? Would we have access to their materials so that we can be consistent with their current implementations?

A14: Our current marketing agency of record is 5by5, based in the Nashville area. We are committed to maintaining consistency across all marketing and recruitment efforts, and we are happy to provide access to relevant creative assets, brand guidelines, and campaign materials as needed to ensure alignment. Collaboration with 5by5 or use of their work will be coordinated through our internal Office of Communications & Marketing.

Q15: Do you currently have a firm providing your Student Recruitment Marketing & Communication Solution services? If not, how recently have you had a firm provide these services? Are you satisfied with these services? If not, or if so, what are important things that the selected firm should know?

A15: Yes, we currently work with Capture Higher Ed to support our student recruitment marketing and communication efforts. That partnership has been in place for the past five years. As we move forward, the most important areas for any selected firm to support include: data analysis, contact acquisition, predictive modeling, communication strategy and implementation. Additionally, we place growing emphasis on the use of online behavioral data to inform student engagement and conversion tactics. A successful partner will bring both strategic insight and operational excellence across these key areas.

Q16: Is there a budget allocated for this solution and if so, what is it?

A16: Please see Answer #2.

Q17: Are enrollment goals to expand the size of the class or continue to maintain the current level of enrollment?

A17: Our enrollment goals are focused on strategic growth that aligns with institutional priorities, market conditions and available resources. While maintaining current enrollment levels remains important, we are also actively exploring opportunities for sustainable expansion in key segments and academic areas. The selected partner should be prepared to support both growth and yield optimization strategies, depending on evolving institutional needs.

Q18: Should there be a question C.9 on Section C of 6.5 Technical and Proposal Guide?

A18: Thank you for pointing out that error. There are nine questions total, C1 through C9. "C10" is a typo.

Q19: Can you confirm whether this RFP seeks services for undergraduate first time in college recruitment only, or if it includes graduate and/or transfer student audiences?

A19: This RFP is primarily focused on undergraduate recruitment, specifically targeting first-time freshmen and transfer students. While our current priorities center on these undergraduate audiences, we are open to solutions that could potentially extend to graduate recruitment in the future. However, we understand that such services would be outside the scope of this contract and would likely require separate scoping and pricing.

Q20: What are the primary KPIs or success metrics Tennessee Tech will use to evaluate the success of this engagement?

A20: We will evaluate the success of this engagement based on key performance indicators tied to progression through the undergraduate recruitment funnel. Primary metrics include the number of inquiries generated, applications submitted, students admitted and subsequent housing and orientation registrations with these ultimately culminating in enrolled students. These indicators reflect both top-of-funnel engagement and bottom-of-funnel conversion, which are critical to our enrollment goals.

Q21: What data sources (internal or third-party) does Tennessee Tech currently use to support enrollment decision-making? Specifically, which third-party sources are you using to acquire student level data? Can you provide the volume for each?

A21: Please see Answer #13.

Q22: Can you provide full funnel data for fall 22-24? Including prospects, if possible.

A22: We appreciate your interest in understanding our enrollment funnel; however, full funnel data, including prospect volume, is considered proprietary and competitively sensitive information. We are happy to discuss general trends or performance benchmarks relevant to this engagement during finalist discussions, but detailed funnel data will not be shared as part of this RFP process.

Q23: How is Tennessee Tech currently using retargeting (IP-based, pixel-based, etc.) and are there any limitations (technical, policy, or vendor-related) that would affect digital targeting strategies?

A23: Tennessee Tech currently incorporates retargeting as part of our digital advertising strategy, including IP-based targeting, pixel-based tracking on the university website and geofencing tactics. All digital advertising efforts must be coordinated with our marketing agency of record to ensure alignment with broader media buys and brand strategy. While there are no major technical or policy limitations,

vendors should be prepared to collaborate closely with our agency to ensure an integrated and consistent digital presence.

Q24: If you are using a current vendor, can you describe the mix of digital, print, and email in your current partnership?

A24: Our current partnership includes a multi-channel approach with a strong emphasis on email communications, including content creation and design. We also utilize pop-up toasters on the university website for targeted messaging, limited digital media buys to support key campaigns, and, in previous years, a single print and mail piece as part of the outreach strategy. The overall mix is designed to support both brand awareness and enrollment conversion at key points in the recruitment cycle.

Q25: How does Tennessee Tech envision third-party vendors integrating with Slate?

A25: Tennessee Tech expects full integration with Slate, which serves as our sole CRM for student recruitment and marketing. The selected vendor will be provided with a university vendor account that grants access equivalent to a university employee, enabling seamless collaboration within Slate. All campaign data, communication workflows and student engagement activity must be managed and tracked through the platform to ensure consistency, compliance and effectiveness.

Q26: Are there existing API capabilities or secure FTP processes that vendors are required to use for data transmission into Slate?

A26: Yes, Tennessee Tech supports both API integration and secure FTP processes for data transmission into Slate. All vendors must adhere to university ITS security protocols and are required to maintain the confidentiality and integrity of student data at all times. Protection of personally identifiable information (PII) is critical, and compliance with all applicable data privacy standards is expected throughout the partnership.

Q27: What Tennessee Tech personnel or resources (marketing, admissions, IT) will be involved in implementation and campaign oversight?

A27: Implementation and campaign oversight at Tennessee Tech will involve a cross-functional team that includes the Office of Communications & Marketing, the Office of Admissions, Information Technology Services, Enrollment Data and Systems and Strategic Planning and Data. This collaborative approach ensures alignment across messaging, recruitment strategy, data integrity, system integration, and institutional goals, allowing for a unified and data-informed execution of all campaign efforts.

Q28: Can you provide a budget for the project?

A28: Please see Answer #2.

Q29: If there are other services that we offer that we believe would be a good fit, do you want those included as well?

A29: If the services offered are within the scope of the RFP and resulting contract, we would be interesting in learning about them. As noted at the bottom of Attachment 6.6, please list them separately; additional services will not be considered in the evaluation.

Q30: How do you define the stages in your recruitment funnel (e.g., “prospect”, “inquiry”, “applicant”, “admit”, “commit”, “matriculant”, etc.) as the complete recruitment communications strategy (initial engagement to enrollment) is in scope for this RFP.

A30: Tennessee Tech utilizes a full-funnel recruitment model that includes the following defined stages: prospect, inquiry, applicant, admit, commit (as measured by event attendance, housing application or orientation registrations), and matriculant/enrolled. Our communications strategy is designed to engage and support students at each of these points, with tailored messaging and tactics that reflect their stage in the decision-making process. This RFP encompasses that full continuum from initial outreach to confirmed enrollment, ensuring a consistent, strategic and data-informed approach throughout the funnel.

Q31: What current volume of communications do you send across email, print marketing, and online advertising channels?

o How many emails do you typically send to each audience segment? Please include as applicable – high school sophomore/junior affinity building emails, parent-specific emails, high school senior emails (across each funnel stage as defined in question 1), transfer, international student-specific campaigns, etc.

o How many households do you typically send print marketing mail to? What do these pieces typically look like (e.g., postcard, viewbook, etc.)? When do you typically send these items? To which audience segments (as defined above)?

o What type of channels do you use for online advertising? (e.g., pre-roll video, banner ads, etc.) How many campaigns do you typically run per year? When do you typically run these campaigns and for how many weeks in duration? Which audience segments (as defined above) do you typically target with these campaigns?

o Do you have a desire to change any of the above volumes or strategies?

A31: The volume and frequency of our communications across email, print and online advertising are considered proprietary and competitively sensitive, and therefore are not disclosed. Our strategy includes targeted email outreach to high school sophomores and juniors for early engagement, high school seniors at each stage of the recruitment funnel, parents, transfer students and international prospects. Print marketing has historically included materials such as postcards and viewbooks, timed strategically throughout the recruitment cycle and directed primarily at high school seniors and transfer audiences.

For digital advertising, we utilize a broad mix of channels including pre-roll video, banner ads, display, and social media. Media buys are typically weighted toward the fall to align with the admissions travel season and target a range of audiences including students and parents. We are continuously evaluating our communication strategy and are open to evolving the volume, cadence and channel mix to better support engagement and enrollment outcomes.

Q32: How do you currently segment audiences for your recruitment communications? (e.g., in-state vs. out-of-state, academic major, etc.) Are there certain audience segments you are hoping to grow?

A32: Tennessee Tech currently segments audiences using a variety of factors, including in-state vs. out-of-state residency, academic interest/major, geographic region, student type (first-time freshman, transfer) and funnel stage. While our recruitment strategy places strong emphasis on in-state students, we also have several targeted out-of-state markets that are priorities for growth. We are continually refining our segmentation approach to support strategic enrollment goals and are open to expanding into new audience segments where there is strong alignment with our academic programs and market opportunity.

Q33: Is there an intended budget or price range for this scope of work?

A33: Please see Answer #2.

Q34: What vendors/partners has Tennessee Technological University previously contracted with for this work? Is there an incumbent vendor/partner? If so, what has been most successful about that partnership? What (if anything) are you looking to change?

A34: Tennessee Tech has previously contracted with Capture Higher Ed for student recruitment marketing and communication services. As we move forward, we are seeking proposals that align with our evolving enrollment goals and offer innovative, data-driven solutions to support the full recruitment funnel. We are not offering public commentary on the current or past partnerships as part of this RFP process.

Q35: What is Tennessee Technological University's most critical goal for the next two years? What is the biggest challenge standing in the way of achieving that goal?

A35: Tennessee Tech's most critical goal over the next two years is to establish a stable and reliable predictive model to consistently yield an incoming freshman class that meets both enrollment and institutional priorities. The biggest challenge in achieving this goal is refining our ability to accurately segment and identify students who are most likely to enroll, particularly as student behavior and market conditions continue to evolve. We are looking for a partner who can help us strengthen this capability through advanced data modeling, strategic targeting and continuous optimization.

Q36: In the event of an award, will it be acceptable to propose applying an existing Master Services Agreement with Tennessee Tech in lieu of the Pro Forma Contract and other RFP legal terms?

A36: At Tennessee Tech's sole discretion, the university may consider an MSA from the vendor in lieu of the Pro Forma Contract. Tennessee Tech will use good faith efforts to negotiate mutually-agreeable contract language with the winning Proposer, but the university is a state entity and therefore must follow Tennessee laws regarding contracting. Any proposed changes or substitutions to the Pro Forma must be submitted with the Technical Proposal in order to be considered.

Q37: Does Tennessee Tech want the actual cost of name acquisition included in the price, or would the name acquisition analysis and acquiring names on TN Tech's behalf be sufficient (with the direct cost of acquisition passed through to TN Tech)? What list sources is Tennessee Tech currently acquiring names from? How is the 60k volume distributed across senior/junior/sophomore names and by list source?

A37: Please see Answer #13. Tennessee Tech maintains separate contracts for name acquisition outside the scope of this RFP. We are not requesting vendors to include the cost of name purchases in their pricing proposals. Instead, we expect the selected partner to provide consultation and analysis to support list strategy and acquisition planning, with the university handling the direct purchase of names. Specific distribution volumes across class years and sources are considered proprietary and will not be disclosed as part of the RFP process.

Q38: For question C under section C.1. Data Analysis, could you define what you mean by "personally identifiable student information?" Just student names? Or all data, such as address?

A38: Personally identifiable student information (PII) includes any data that can be used to identify an individual student. This encompasses, but is not limited to, student names, email addresses, phone numbers and physical mailing addresses. While analysis may be conducted using masked or aggregated demographic data (e.g., city, ZIP code, or other geographic or behavioral attributes), vendors must treat all direct identifiers as confidential and handle them in accordance with university data security and privacy protocols.

Q39: For question A6 regarding SSO, are you asking if we can integrate with Tennessee Tech's SSO capability? Or are you asking if we can provide our own SSO login capability?

A39: We are asking if you can integrate with Tennessee Tech's existing SSO (Single Sign-On) capability. Integration is necessary for accessing any vendor-hosted dashboards or platforms that support the engagement. However, please note that all core recruitment and communication functions must flow through Slate, which remains our sole CRM. SSO would be used strictly for access to any external vendor tools, not for CRM functionality.

Q40: Does Tennessee Tech have an established budget for this project?

A40: Please see Answer #2.

Q41: What are your enrollment goals?

A41: Tennessee Tech's strategic enrollment goal is to reach a total headcount of 12,000 students by 2028, as outlined in the university's strategic plan. This includes growth across key undergraduate populations, with a focus on sustainable, data-informed recruitment strategies.

Q42: Are you currently working with a vendor? If so, who are you currently partnering with and what is the scope of the engagement?

A42: Please see Answer #11. The incumbent is nearing the end of a multi-year contract with Tennessee Tech to provide the services listed in this RFP.

Q43: If you're currently working with a vendor partner, we'd love to understand what prompted Tennessee Tech to begin the RFP process. Are there specific needs or goals that haven't been fully met?

A43: As a public state university, Tennessee Tech is required to follow state procurement guidelines. The current contract term has concluded, prompting the need to issue a new RFP. This process ensures transparency, competitiveness and alignment with evolving institutional goals, regardless of past vendor performance.

Q44: As you think about a new partnership with a vendor, what does a successful partnership look like?

A44: Please see Answer #4.

Q45: What is your purchase volume by class and vendor?

A45: Please see Answer #13.

Q46: Is your organization seeking a strategic partner to manage the execution and ongoing lift of this engagement, or are you primarily looking for us to develop and deliver content that will be integrated directly into your existing CRM system?

A46: Tennessee Tech is seeking a strategic partner that can provide both content development and execution of the recruitment marketing and communication plan. This includes creating compelling, audience-specific content as well as managing campaign implementation, tracking and optimization within our existing Slate CRM environment. We value a collaborative partner who can support the full lifecycle of engagement from strategy through delivery and performance analysis.

Q47: At which points in the enrollment funnel are you currently seeing challenges with engagement, if any, and do you have any data or insights that highlight where friction is occurring?

A47: Our primary challenges are occurring in the later stages of the enrollment funnel, particularly around yield and converting admitted students to enrolled students. We are also focused on identifying and filtering out non-serious or “junk” applications earlier in the process to better target resources and communications toward students with a higher likelihood of enrolling. We continue to analyze engagement data within Slate to refine our strategies and reduce friction during these key stages.

Q48: Could the University clarify its specific enrollment growth goals for the 2026 recruitment cycle and beyond? For example, is there a target percentage increase or specific enrollment number the University aims to achieve?

A48: Please see Answer #41.

Q49: To help us better align our proposed strategy and projections with Tennessee Tech’s enrollment goals, could the University provide historical or target conversion metrics for the following key stages of the undergraduate enrollment funnel?

Prospect to Inquiry (initial interest or engagement)

- i. Inquiry to Application
- ii. Application to Admitted Student
- iii. Admitted Student to Deposit/Commitment
- iv. Commitment to Enrolled (Matriculated) Student

A49: At this stage of RFP process, Tennessee Tech does not release detailed historical or target conversion metrics for each stage of the enrollment funnel, as this information is considered proprietary and competitively sensitive. We encourage vendors to propose data-informed strategies based on industry benchmarks and best practices, and we will work collaboratively with the selected partner to align on performance expectations and funnel optimization throughout the engagement.

Q50: If available, could you share historical engagement metrics for key conversion activities such as:

- a. Campus visits or virtual event participation
- b. Financial aid or scholarship application completion rates

A50: Tennessee Tech considers historical engagement metrics such as event participation and financial aid or scholarship application rates to be proprietary and competitively sensitive. While we are unable to share specific figures, these activities are key components of our conversion strategy, and we are open to collaborating with the selected partner to align efforts that support and enhance engagement at these critical points in the funnel.

End of Comments/Questions/Answers.