



EAB

Enrollment Services and Student Success Collaborative Proposal for New Mexico State University

January 22, 2019

Alex White

Managing Director, Client Development

(800) 899-7227

awhite@eab.com

Erik Candy

Executive Director

(202) 266-6376

ECandy@eab.com

*In Response to Request for Proposal for Student Recruitment
Retention Program and Consulting Services (2019-RFP-104)*

This proposal (together with any attachments and any subsequent amendments or addenda thereto, the "Response") has been provided by EAB Global, Inc. ("EAB") exclusively for New Mexico State University ("NMSU") to evaluate a possible business relationship with EAB. As such, the Response shall be deemed proprietary and confidential to EAB Global, Inc. as indicated specifically herein, and all other use or disclosure of the Response is prohibited.

Table of Contents

Executive Summary	5
EAB’s Response to NMSU’s Scope of Work	8
Part One: Proposal Response	16
Part Two: Proposal Evaluation Format and Contents of Proposal.....	17
Evaluation Criteria	36
Privacy	37

Appendices *(Appendices Are Trade Secret and Proprietary – Do Not Distribute)*

Appendix A – Financial Aid Optimization Sample Monitoring Reporting	
Appendix B – Yield IQ Sample Reporting Dashboards	
Appendix C – Enrollment Marketing Sample Reports	
Appendix D – EAB’s Staff	
Appendix E – Adult Learner Recruitment Overview	
Appendix F – Enrollment Marketing Implementation Timeline	
Appendix G – Navigate Implementation Timeline	
Appendix H – Navigate Technical Evaluation Guide	
Appendix I – EAB’s Exceptions to NMSU’s Terms and Conditions	

Separate Enclosures

- Conflict of Interest Form
- Non-Collusion Form

Note About Trade Secret and Confidential Information

EAB has identified information that is proprietary and trade secret throughout this document. We request NMSU to respect the nondisclosure of this information. EAB stands ready to provide a redacted copy of our proposal, removing those sections deemed proprietary and confidential, should that be needed. The identified information is considered proprietary and confidential Trade Secrets for the following reasons:

- This information is not generally known outside of our company.
- The disclosure of this information would cause substantial injury to the competitive position of our services.
- We have taken reasonable precautions to protect the secrecy of this information (e.g., this information is not released publicly, and we have implemented appropriate controls internally to control the dissemination of this information).
- We derive significant economic value from having this information while our competitors do not.
- This information represents a significant amount of time and expense and would take a similar amount of time and expense for our competitors to acquire and duplicate it.

This document illustrates current tools, features, and functionalities of EAB's product. All images are close representations of our capabilities but should not be relied upon as exact images. They are subject to change. In some cases, future tools, features, and functionalities are shown. In this document, the symbol ^ represents that some portions of these capabilities are being enhanced in near-term releases, while the symbol ~ represents some capabilities that are being planned for the future. We reserve the right to modify our product plans in our sole discretion. NMSU acknowledges and agrees you shall not rely on the future availability of any tools, features, and functionalities, or any future updates to the EAB Software, in your purchase of any EAB Software.



January 22, 2019

Javier Cordero
New Mexico State University
2850 Weddell Drive S., Suite 100
P.O. Box 30001 MSC 3890
Las Cruces, NM 88003

Dear Mr. Cordero,

Thank you for the time you have afforded EAB Global, Inc. (“EAB”) to respond to New Mexico State University’s (“NMSU”) Request for Proposal for Student Recruitment Retention Program and Consulting Services (2019-RFP-104).

Over the past several months, EAB has had highly productive conversations with NMSU’s senior leadership regarding your enrollment and student success objectives. NMSU is committed to a bold shift in enrollment and student success strategy, and EAB is proud to confirm that we are the only provider who can single-handedly execute on the full scope of services requested in this RFP.

EAB is the nation’s leading provider of full-service enrollment and student success solutions. While our comprehensive offering has evolved over the years, we bring decades of experience to bear in the areas of best practice research, student recruitment, enrollment management, financial aid optimization, and student success technologies. We understand exactly what NMSU is trying to achieve by adopting a unified strategic approach to enrollment and student success.

EAB is uniquely positioned to provide the comprehensive set of services that NMSU seeks due to our demonstrated experience and ability to drive impact at every stage of the student lifecycle. By partnering with EAB, NMSU stands to benefit from our rigorously tested approach, our immense data assets, our commitment to innovation, and our high-touch service model. EAB endeavors to be a true partner to NMSU, not merely another vendor, and we are eager to work alongside your institution as you build your future.

Thank you for the opportunity to respond to this RFP. We hope you will find the enclosed proposal compelling, and we look forward to discussing these plans further in the coming weeks.

Sincerely,

A handwritten signature in blue ink, appearing to read "Alex White".

Alex White, *Managing Director, Client Development*
(800) 899-7227, awhite@eab.com

A handwritten signature in blue ink, appearing to read "Erik Candy".

Erik Candy, *Executive Director*
(202) 266-6376, ecandy@eab.com

Executive Summary

A Unified Student Experience

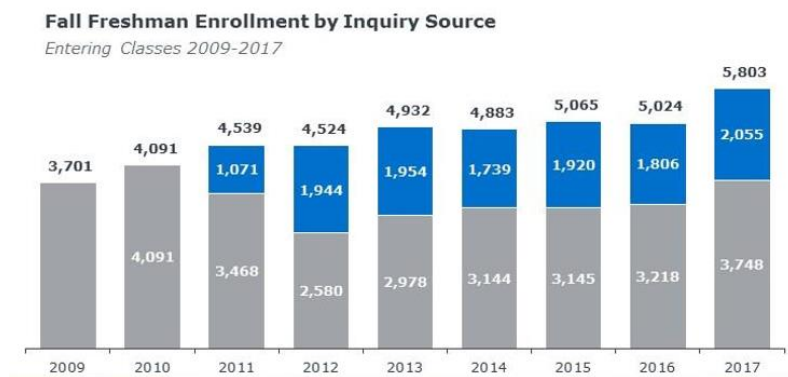
Enrollment and student success are inextricably linked. EAB—higher education’s thought partner and leading provider of services across both domains—recognized the importance of this link and embarked on creating an unbroken spectrum of support across the entire student lifecycle. By deepening your partnership with EAB, NMSU will be equipped to execute a highly coordinated and data-driven recruitment-to-graduation strategy that draws on EAB’s experience working with over 1,400 colleges and universities, insights gleaned from 10,000+ annual research interviews, and the intelligence of a data platform with 250+ million student records.

Enhancing Enrollment Outcomes with Innovation and Best Practices

EAB has provided enrollment marketing and financial aid optimization services to colleges and universities across the country for nearly 30 years. We have the scale and experience to develop and deploy a comprehensive, fully integrated recruitment strategy that will optimize your outcomes at every stage of the enrollment funnel and position NMSU to achieve its enrollment and net revenue goals. As a direct-marketing firm dedicated to research and testing, EAB performs student outreach and rigorously collects response data in order to develop the most effective marketing and recruitment strategies. EAB’s Innovation Lab, staffed by 100+ marketing and analytics professionals, conducts 300+ split A/B tests every year to refine and optimize these strategies. Our robust testing agenda is informed by our ongoing research of student behavior and communication preferences, as well as feedback sourced from across our membership of 350+ partner institutions. In partnership with EAB, NMSU will recruit its best-fit students with a unified approach that is aligned to your vision and goals, infused with your voice and brand, and driven by innovative techniques and proven best practices.

Case Study: Large Public University in the South

Faced with a 32% decrease in state appropriations per student post-recession, this institution partnered with EAB Enrollment Services to implement a strategic enrollment marketing plan focused on cultivating out-of-state markets and improving the quality and diversity of its entering classes. The result was significant gains in enrollment and net tuition revenue and a sizeable return on their EAB investment. Now, over 90% of their out-of-state enrollments are influenced by EAB.



57% increase in freshman enrollment from 2009 to 2017	62-pt increase in average SAT score from 2009 to 2017	30% increase in minority enrollment from 2016 to 2017	92% of out-of-state enrollments influenced by EAB Student Search
---	---	---	--

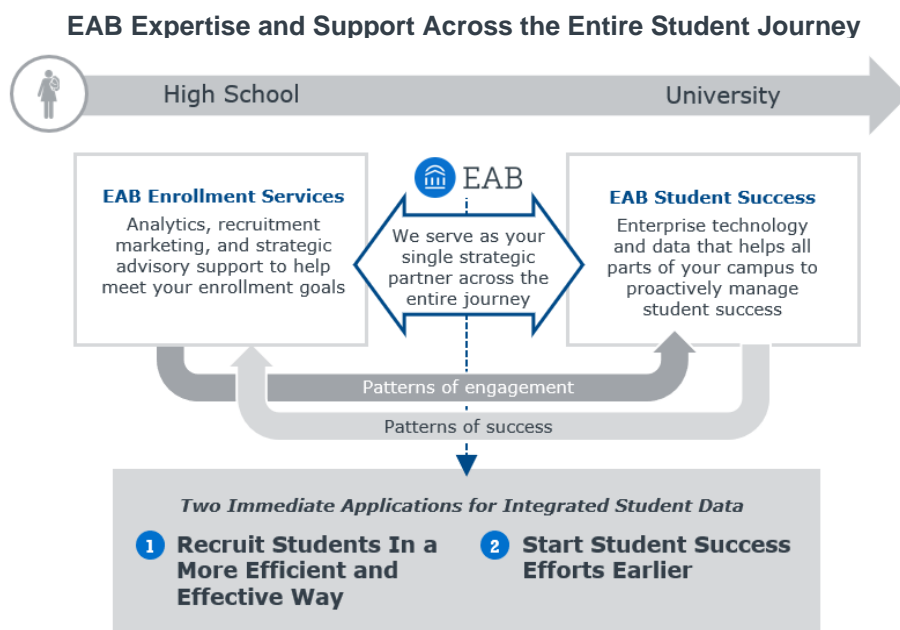
Bridging Enrollment and Financial Aid Strategy

By partnering with EAB on Enrollment Marketing and Financial Aid Optimization services, NMSU will benefit from our cross-division data assets and highly integrated approach to strategy development and program execution. Once students have progressed through the Student Search and Application Marketing process (described in greater detail beginning on **page 8**), EAB's Financial Aid Optimization services will drive increases in net tuition revenue by ensuring that your financial aid dollars have maximum impact relative to your enrollment goals. EAB's Financial Aid Optimization division will work closely with your dedicated EAB team and NMSU leadership from the earliest stages of aid-policy development through to the final stages of yield management.

From Enrollment to Student Success Management

This proposal includes an invitation to join EAB's Student Success Collaborative, a network of more than 500 colleges and universities nationwide who share a common goal of solving higher education's toughest challenges. Membership in the collaborative comes with access to our Student Success Management System (SSMS) technology, Navigate, which captures the momentum built by recruitment campaigns and uses it to propel students to success. A host of behavioral and interaction data from NMSU's enrollment campaigns will enhance our student success analytic models by providing in-depth insights into newly enrolled students' first year persistence from the first day of school. Likewise, student success data is used to refine search strategies, creating a virtuous cycle that yields outstanding results. The Navigate student interface, known as Smart Guidance, can be used to counteract summer melt by fostering student engagement through both mobile and desktop platforms. In a recent pilot, 94% of students who engaged through the mobile application matriculated versus 70% of non-mobile application users.

NMSU is poised to reap the enormous benefits of Navigate. Navigate's Smart Guidance will equip students with a comprehensive set of mobile and desktop self-service tools for building an academic plan and navigating the college journey, making timely, informed decisions, and connecting with NMSU, along with alerts, reminders, and "nudges," that gently guide students to success. Strategic Care creates a connected and coordinated network of support across campus for every student, enabling targeted interventions and proactive problem resolution. Intelligence feeds administrators and advisors an expansive set of KPIs, process metrics, and



population health analytics to track progress toward student success goals and monitor staff activity, accompanied by strategic analysis and recommendations from your EAB Technology Strategic Leader. Furthermore, NMSU will have access to an ever-growing library of toolkits, best-practice briefs, case studies, diagnostics, and much more—all focused on the student success challenges identified as most critical to the nation's higher education leaders. While NMSU is encouraged to explore the library for insights and up-to-date information on industry best practices, EAB experts are always available to provide leadership education, on-demand consultation, and quick-run research projects.

Talent and Expertise to Fully Activate NMSU's Success

A hallmark of partnership with EAB is our intensive dedication of talent and expertise. Our service approach is deliberately high-touch, and our unique organizational structure will ensure that NMSU has comprehensive support and ready access to EAB's experts and resources. A dedicated Enrollment Strategic Leader, Financial Aid Principal, and Technology Strategic Leader will be your primary points of contact for the lifetime of our engagement. As NMSU is currently aware, EAB's Strategic Leaders form an active partnership with your team. Your Enrollment Strategic Leader and Financial Aid Optimization Principal will be deeply engaged with all aspects of program development, execution, monitoring, and optimization, and will ensure that every aspect of our work together is reflective of NMSU's unique identity, needs, and aspirations. NMSU's Technology Strategic Leader will serve as your on-call expert, train and coach system users, review progress with academic leaders, unlock insights from data, troubleshoot, and help identify solutions for systemic graduation challenges.

EAB places a premium on availability and will look forward to planning and strategizing with NMSU on weekly calls, periodic on-campus visits, and annual summits at our Richmond, Virginia and Washington, DC, offices. Your collective EAB team will also be readily accessible to NMSU—no calls to EAB go to voicemail, and your Strategic Leaders and Financial Aid Optimization Principal will likely offer their cell phone numbers to provide extra availability. Across all services areas, our goal is to function as a seamless extension of the teams supporting admissions, financial aid, and student success at NMSU.

Conclusion

EAB is uniquely qualified to provide NMSU a comprehensive solution to support stronger enrollment and post-enrollment student success outcomes. Our Enrollment Services division is a recognized industry leader, and our Student Success Management System, Navigate, offers a powerful array of communications, reporting and intervention tools that will generate remarkable outcomes for NMSU. In partnership with EAB, NMSU will be equipped to adopt a holistic approach to student lifecycle management. Each service area is undergirded by ongoing, original research and supported by an intensive dedication of talent and expertise to ensure best practice implementation and to maximize the benefits to NMSU. EAB is committed to partnering with NMSU during this period of bold transition, and we look forward to bringing all of our products and services to bear to help you build your future. We are grateful for the opportunity to submit this proposal and excited by the prospect of a comprehensive partnership with NMSU.

EAB's Response to NMSU's Scope of Work

Recruitment and Enrollment

Enrollment Marketing

EAB has the scale and experience to develop and deploy a comprehensive, fully integrated enrollment marketing strategy that will drive engagement and stronger outcomes at every stage of the funnel. While we will leverage proven techniques and student engagement best practices to maximize impact, the campaigns that we deploy in partnership with NMSU will be thoroughly customized to

Outsized Impact on the Metrics That Matter

Delivering Consistent Results

8.3%

average annual net tuition revenue increase

2.4-pt

average annual SAT score increase

Impact Beyond Enrollment

5% pt

higher first-year retention rates for EAB-recruited students

13%

higher rates of post-graduation advancement giving for EAB-recruited students

Serving Diverse Enrollment Aims

10%

increase in deposits for schools seeking growth

3.6-pt

increase in SAT score for schools not seeking growth

Creating Sustainable Partnerships

7:1

average ROI for first-year EAB partner schools

89%

renewal rate across EAB partner schools

support your unique goals, speak with your distinct voice, and showcase your powerful brand. Our Creative Directors will interview your team and cultivate a deep understanding of NMSU's core messaging and value proposition. As we begin to build a more engaged prospect pool together, EAB will conduct an Institutional Awareness and Perception Study to understand what aspects of NMSU resonate with your prospects (and what don't) and how to calibrate your recruitment strategy and campaign messaging to leverage your unique market position. EAB will also analyze the timing, targeting, and content of the recruitment communications conducted by NMSU independent of our campaigns. Through this collaborative process we will develop an enrollment marketing plan that ensures both EAB and NMSU communications are executed in alignment and to the greatest effect, eliminating redundancy in the process. Together we will achieve a high level of coordination that maximizes the value and impact of our mutual efforts and positions NMSU to achieve its goals.

Targeting NMSU's Right-Fit Prospective Students

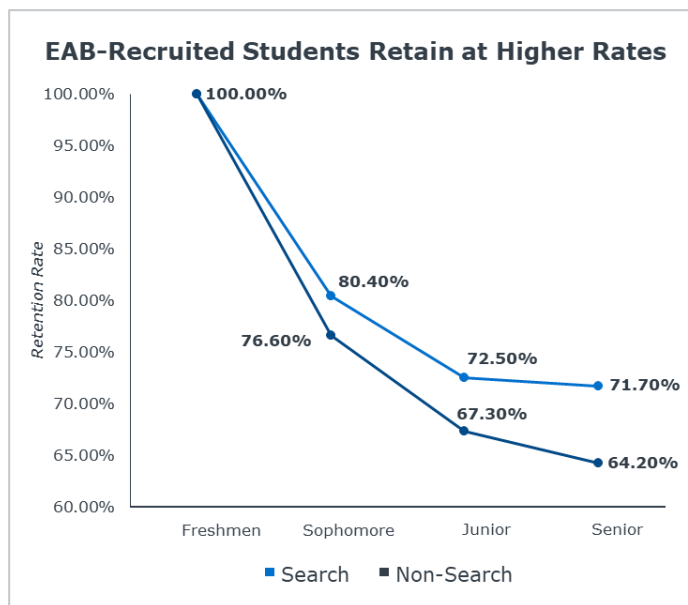
[This Response Is Trade Secret and Confidential. Please Do Not Distribute.](#)

Our partnership begins by building a comprehensive targeting strategy focused squarely on NMSU's goals and enrollment aspirations.

As markets shift and the recruitment landscape continues to evolve, institutions must be prepared to adapt their strategies accordingly. To this end, EAB’s analysts and targeting experts work hand in hand to ensure that campaign monitoring is robust, strategies are constantly scrutinized, and advanced targeting techniques are appropriately leveraged.

Driving Engagement and Inquiry Generation with Student Search

Building and engaging a robust pipeline of student inquiries is critical to achieving enrollment success—80% of prospective students first make themselves available to be recruited beginning in 10th and 11th grade, and students who are recruited early drive stronger enrollment outcomes. For nearly 30 years, EAB’s Student Search and Fulfillment campaigns have provided the strategic foundation for consistent and reliable inquiry pool growth and engagement at institutions across the country. Our response rates consistently outpace the national average by a wide margin, and our inquiries bring forth



genuine interest that carries through to the application and enrollment stage, positively impacting both yield and academic quality. Over time, the campaigns support robust inquiry pool growth, deepened engagement between NMSU and its best-fit prospective students, and enhanced enrollment (and post-enrollment) outcomes—not only are EAB-recruited students more likely to enroll and exhibit higher quality, but our research has proven that they also are **5% more likely to persist** to sophomore year and 13% more likely to give as alumni. Furthermore, EAB has long maintained a stringent definition for what constitutes a Student Search inquiry. To be considered a responder in our campaigns, the targeted student must take a deliberate action that reflects true engagement with the marketing, such as navigating to an EAB-hosted landing page to update his

or her contact information or mailing in a direct-mail reply form. While other firms utilize softer metrics to measure response, simply opening an email or clicking on a link does not meet our threshold for true engagement. Nonetheless, we are confident that **NMSU will achieve an average response rate of 10–12%**, if not higher, with its EAB Student Search campaign.

This Response Is Trade Secret and Confidential. Please Do Not Distribute

information, provide information about their students, and express interest in visiting campus.

Building Immediate Demand with Application Marketing

This Response Is Trade Secret and Confidential. Please Do Not Distribute.

EAB's Application Marketing campaigns are the fastest way to build immediate demand, maximize submission and completion activity, and grow your admitted-student pool.

EAB's Custom Application Is Device-Optimized and Student-Optimized

Financial Aid and Onboarding

Financial Aid Optimization (“FAO”)

This Response Is Trade Secret and Confidential. Please Do Not Distribute.

EAB’s Financial Aid Optimization (“FAO”) services include monitoring and consulting services as well as the development of a live-simulation enrollment and net revenue model that will:

Yield IQ: Leveraging Advanced Analytics to Optimize Yield

This Response Is Trade Secret and Confidential. Please Do Not Distribute.

Yield IQ is EAB's solution to the issues of yield volatility and the lack of visibility into students' enrollment intentions. The program delivers enhanced student-level information, optimizing the admission workflow by helping NMSU target individual students for personalized follow-up.

Student Retention and Predictive Analytics

Navigate Student Success Technology

As an SSMS, Navigate will wire NMSU with the complete set of tools for executing a sophisticated, proactive approach to student retention and success. Predictive analytics powered by machine learning provide earlier notification of student needs, while reports and analyses developed from EAB research allow for global visibility into the most important student success metrics. These insights are seamlessly integrated with intervention, workflow, and collaboration tools for taking action from data-driven insight. By linking thousands of users on a single student success platform, Navigate activates a Coordinated Care Network that organizes cross-institutional resources around student needs. Our SSMS brings together three primary modules:

Intelligence: Unlock the power of data analytics, bringing real-time insights and student success management intelligence to administrators and leaders.

Strategic Care: Create a connected and coordinated network of support for every student, enabling targeted intervention and proactive, strategic care.

Smart Guidance: Provide curated smart guidance at the most pivotal moments students encounter in college using the following capability sets:

- **Milestone Guidance:** Delivers tailored, ongoing support via a dynamic mobile and desktop platform to help students succeed.
- **Academic Planning:** Allows students to develop an academic plan toward graduation, build a schedule, and register for classes in real time.

When combined with EAB's research-based best practices, these modules provide the foundation for the most advanced and effective student success technology on the market. Among other reasons, Navigate stands apart because of its robust analytics, delivering timely and accurate predictive insight throughout the tool's functional landscape; its comprehensive scope, providing a complete set of business intelligence, case management and student empowerment capabilities; and its demonstrated results, with more than 26 published case studies and a catalog of 125+ cases of demonstrated impact and ROI on record.

Navigate, however, is more than a technology solution. It is a dedicated partnership and a gateway to the industry's largest and most comprehensive source of higher education insight. As previously mentioned, NMSU will also be invited to join EAB's Student Success Collaborative, a membership of more than 500 colleges and universities nationwide working together to improve student outcomes and experiences. Members of the Collaborative are encouraged to share their experiences of working with Navigate through an online Member Community; not only does this help members develop a better understanding of the tool's capabilities and opportunities for impact, but it also provides EAB with crucial feedback for Navigate's continued development.

Furthermore, NMSU will benefit from extensive and ongoing consultant support, access to a library of best practice research, Collaborative-wide networking opportunities, and the consultative insight of our Student Success Accelerator.

Part One: Proposal Response

1. Name, address, telephone/fax number and email address of business
2. Name of primary contact
3. Authorized signature and title of Respondent's signatory

Name: EAB Global, Inc.

Address: 2445 M Street, NW
Washington, DC 20037

Telephone/Fax: 202-747-1000 (phone); 202-747-1010 (fax)

Email: awhite@eab.com

Primary Contact: Alex White, Managing Director, Client Development

Respondent's Signatory: Alex White, Managing Director, Client Development



4. Statement that Respondent has the ability to provide the services requested and, upon selection for an Award, will agree to NMSU's terms and conditions referenced in this RFP, subject to any request for exceptions listed in the letter, per Item 5 below.

EAB has the ability to provide the services requested. EAB agrees to NMSU's terms and conditions referenced in this RFP to the extent outlined in our letter of exceptions to NMSU's terms and conditions, included as **Appendix I**.

5. A detailed listing of any exceptions requested with respect to NMSU's Contract Terms and Conditions.

Please see **Appendix I** for EAB's exceptions to NMSU's terms and conditions.

6. A statement of any known or perceived conflict of interest that the firm may have related to any relationships with NMSU Regents or employees or otherwise.

There is no material, pending litigation against the firm that the firm should reasonably believe could adversely affect its ability to meet contract requirements pursuant to this RFP or is likely to have a material adverse effect on the firm's financial condition. EAB is not aware of any conflicts of interest that would arise if it were to enter into an engagement with NMSU.

7. Statement acknowledging any addendum to the RFP posted in the NMSU Pistol Pete's Online Bidding System.

EAB acknowledges all questions and answers, and documents, posted.

Part Two: Proposal Evaluation Format and Contents of Proposal

1. Qualified Professional Experience and Capacity: Overview of current and prior experience in work comparable to the scope of services required in this request for proposals. Include years of experience providing these services for similar institutions of comparable size and complexity.

At EAB, our mission is to make education smarter. Founded as a higher education best practice research firm in 2007, EAB has a 40-year tradition of delivering exceptional service, insight, and results. Today we harness the collective power of more than 1,400 educational institutions worldwide to uncover and apply proven practices and game-changing insights. Complex problems require multifaceted solutions, so we work with each school differently to apply these findings through a customized blend of research, technology, and services. From kindergarten to college and beyond, EAB partners with education leaders, practitioners, and staff to accelerate progress and drive results in four strategic areas: enrollment management, student success, graduate program growth, and resource optimization. We are honored to work with the most progressive colleges, universities, community colleges, K-12 districts, independent schools, and graduate programs in the country. For a detailed listing of EAB's experienced staff please see [Appendix D](#).

Enrollment Services

For nearly 30 years, EAB's Enrollment Services division, formerly Royall & Company, has helped hundreds of colleges and universities achieve their enrollment goals through scientifically proven, multichannel marketing campaigns designed to initiate and build long-term relationships with right-fit prospective students, their parents, and their guidance counselors. We currently partner with 350+ institutions and execute 2,000+ marketing campaigns annually. Our work has resulted in 1.5B+ student interactions annually, 300+ field marketing tests performed annually, and a 7:1 ROI for EAB Enrollment Services clients.

Financial Aid Optimization

EAB's Financial Aid Optimization division, formerly Hardwick Day, was founded in 1994 and is a leading enrollment management and financial aid consulting firm that works exclusively with colleges and universities to achieve strategic enrollment and tuition revenue goals. EAB's FAO team has a combined 100+ years of on-campus experience and includes credentialed statisticians and former enrollment leaders. To date we have supported 150+ private and public institutions with missions as diverse as fully residential liberal arts, Research 1, Land Grant, and single-sex education.

Navigate

Navigate was built from 10+ years of research into student success best practices to help institutions of higher learning deliver a stronger "return on education," which at EAB we define as "improved completion rates, decreased time and cost to degree, better postgraduate outcomes,

and a narrowing (and, ultimately, closure) of the achievement gap.” Stemming from this research, and to encourage industry-wide positive change, EAB launched the Student Success Collaborative in 2012. The Student Success Collaborative now includes more than 500 colleges, community colleges, and universities working together to improve student outcomes and experiences, and EAB serves 1,400+ institutions in total.

2. Past Record of Performance: Provide past record of performance regarding change management for systems, programs and strategies; organization effectiveness and performance; and public relations. Respondent shall include specific details regarding the impact of services to growth in student enrollment and ultimately university revenues. Past record of performance should be limited to 7 years. Include a list of 5 client references, names and telephone numbers of clients.

This Response Is Trade Secret and Confidential. Please Do Not Distribute.

Included below is an assortment of case studies from public institutions currently partnering with EAB on Enrollment Marketing services and our proprietary SSMS, Navigate. Should NMSU desire additional information regarding these institutions and the impact of our work, we are pleased to oblige.

Case Studies: Enrollment Marketing

Case Studies: Navigate

References: Enrollment Services and Navigate

With respect to the finalized agreement, please note Section 11 of EAB's template master service agreement, included within *Appendix I*.

4. Information Security: What types of encryption are used to secure sensitive and confidential university data, both at rest and in transport? How are encryption keys managed? How do you insure the physical security of your data center and other services critical to the integrity and security of New Mexico State University data? Do you have an incident response plan that details your response in the event of an information security breach that affects New Mexico State University data? Has this plan been reviewed or audited by an independent third party? For those classes of data whose protection is mandated by legislation or industry regulation, have you been audited for compliance? (For example, FERPA, GDPR.)

This Response Is Trade Secret and Confidential. Please Do Not Distribute.

Enrollment Services and Financial Aid Optimization

Navigate

5. Integration: Describe how two-way communication can be achieved between Ellucian Banner and the CRM system. Do you support batch processing? Real-time integration? Describe the ability to integrate with the College Source degree audit system – UAchieve and UDirect. Describe the ability to integrate with the Canvas learning management system. Describe the ability to integrate with third-party web analytics tools such as Google Analytics. Describe the ability to integrate with third-party content marketing tools such as Hannon Hill Spectate, and specifically using a Salesforce/Pardot connector. Does your system have an API which is well-defined, well-documented and flexible? If available, please provide a link to your API library.

This Response Is Trade Secret and Confidential. Please Do Not Distribute.

Enrollment Marketing

Navigate

~At the time of submission, this capability is in the planning stages.

6. Data Production: How will institutional specific data and research support recruitment and retention practices? How will data dashboards be available on an almost real-time or regular basis to evaluate current strategy and product reports for governing body? How you will build institutional expertise in utilizing data to drive future strategy?

This Response Is Trade Secret and Confidential. Please Do Not Distribute.

Enrollment Marketing

Institutional specific data and research will play a key role in developing targeting and creative strategies to support our enrollment marketing campaigns.

For sample reports, please see [Appendix C](#).

Navigate

EAB is guided by a simple and singular mission to “make education smarter,” and our customized approach to data production and predictive modeling plays an outsize role in fulfilling that mission.

7. Technical Support: What is your typical/expected time to implementation? Detailed implementation plan. Provide specific technical functions to be allocated for this project (i.e. Database administration, SIS administration, functional users, trainer, etc.). How many hours of migration expected.

This Response Is Trade Secret and Confidential. Please Do Not Distribute.

The following is an overview of the implementation process for Enrollment Marketing, , and Navigate, . Detailed development timelines are included as **Appendix F** and **Appendix G**.

Enrollment Marketing

While much of the effort involved in strategy-setting, campaign development, and execution will be borne by your dedicated EAB team, we have found that it is essential to have stakeholders assigned and deeply engaged to foster the kind of collaboration necessary for program success.

Navigate

8. Presentation: Selected finalists will be required to provide a presentation of services provided, which may be conducted in person or via remote technology.

Confirmed. EAB welcomes the opportunity to provide a presentation of our services, should NMSU determine that EAB is a finalist following review of our proposal.

9. Cost/Price: Respondent will be required to quote a yearly cost excluding Gross Receipts Tax for each the following categories:

- **Recruitment**
 - **Total Cost with Break Down for Inquiry Generation – indicate services provided, number of estimated inquiries by high school academic group (Sophomores, Juniors, Seniors and parent)**
 - **Total Cost with Break Down for Application Generation – indicate services provided, number of estimated applicants by college academic group (undergraduate, graduate, etc.).**
- **Financial Aid**
 - **Total Cost with Break Down for Financial Aid Optimization – include services provided to identify and estimate cost of scholarship programs and net tuition revenue**
- **Student Retention**
 - **Total Cost with Break Down for Student Retention – include services provided for academic planning, scheduling and registration**

EAB is pleased to offer the following pricing to NMSU. Given that EAB would very much like to partner with NMSU and to help it exceed its recruitment, retention, and institutional objectives, EAB is prepared to offer significant “EAB Investments.”

The EAB Investments outlined are contingent upon a four-year fixed term to service. If NMSU should “opt out” of the agreement for any reason prior to the end of the four-year term, NMSU will repay the total of the EAB Investments.

Our financial proposal reflects a customized and comprehensive strategy designed to meet the goals of NMSU. We’ve proposed a holistic solution; however, **should these services not accurately reflect NMSU’s needs or current budget, EAB is open to discussing ways to scale or redefine the scope of services and provide updated pricing to reflect those revisions.**

In addition, please note:

- All fees listed are annual fees and are fully inclusive of all aspects of service outlined in this proposal.
- All travel fees are included; no additional travel fees will apply. There is no set amount of trips either to NMSU’s campus or to EAB. All fees associated with any/all trips will be covered by EAB with no expense charged to NMSU.
- All List Costs will be invoiced by and paid directly to the List Provider (not EAB), which will require separate purchase orders.
- Postage costs and digital media costs are pass-through charges paid by EAB on NMSU’s behalf.

PROGRAM	FY 2019		FY 2020		FY 2021		FY 2022	
	Quantity	Cost	Quantity	Cost	Quantity	Cost	Quantity	Cost
ENROLLMENT MARKETING								
Inquiry Generation								
Year-Round Sophomore and Junior Search								
<i>List Source Names</i>	<u>200,000</u>		<u>200,000</u>		<u>200,000</u>		<u>200,000</u>	
Total	200,000	\$251,380	200,000	\$259,940	200,000	\$267,740	200,000	\$275,780
Year-Long Fulfillment (30-Day Fulfillment in FY19)	20,000	\$90,500	24,000	\$143,840	24,000	\$148,160	24,000	\$152,600
Parent First Search			~60,000	\$20,600	~60,000	\$21,220	~60,000	\$21,860
Institutional Awareness and Perception Study				\$20,000				
Application Generation								
Application Marketing (Marketing to NMSU App in FY19)								
<i>Inquiry Pool</i>	25,000		30,000		35,000		35,000	
<i>Senior Search – NewNames</i>	75,000		75,000		75,000		75,000	
<i>Senior Search – PRE Names</i>	<u>25,000</u>		<u>25,000</u>		<u>25,000</u>		<u>25,000</u>	
Total	125,000	\$361,520	130,000	\$427,890	135,000	\$465,920	135,000	\$479,890
Web Application								
<i>Freshman</i>			1		1		1	
<i>Transfer</i>			1		1		1	
<i>International</i>			<u>1</u>		<u>1</u>		<u>1</u>	
Total			3	\$48,300	3	\$49,750	3	\$51,250
YIELD OPTIMIZATION								
Yield IQ (Deposit IQ in FY19)	All Admits	\$67,240	All Admits	\$69,260	All Admits	\$71,340	All Admits	\$73,490
Financial Aid Optimization (Consulting and Historical Analysis in FY19)				\$97,850		\$100,790		\$103,820
Net Price Calculator				\$12,360		\$12,730		\$13,110
Total		\$67,240		\$179,470		\$184,860		\$190,420
NAVIGATE STUDENT SUCCESS TECHNOLOGY PLATFORM								
Student Success Accelerator		\$15,000						
One-Time Implementation Fee		\$115,500						
Annual Membership Fee		\$96,000		\$288,000		\$296,640		\$305,540
SUBTOTAL		\$997,140		\$1,388,040		\$1,434,290		\$1,477,340
EAB INVESTMENT		(\$193,510)		(\$169,680)		(\$169,390)		(\$167,660)
TOTAL PROGRAM COST		\$803,630		\$1,218,360		\$1,264,900		\$1,309,680
<i>Postage Estimate</i>		\$66,634		\$71,262		\$74,733		\$76,226
<i>Digital Media Estimate</i>		\$39,945		\$42,554		\$44,871		\$46,217
<i>List Estimate</i>		\$141,137		\$145,372		\$149,732		\$154,225

Evaluation Criteria

Please find included on the preceding pages a detailed response to assist NMSU in evaluating EAB on each of the listed criteria.

Certificate Issued by State of New Mexico Taxation and Revenue

As noted in **Appendix I** (EAB's Exceptions to NMSU's terms and conditions), EAB is in the process of registering with the New Mexico Secretary of State and Department of Revenue & Taxation.

New Mexico Resident Business Preference

EAB does not qualify for New Mexico resident business preference.

Veteran New Mexico Resident Business Preference

EAB does not qualify for veteran New Mexico business preference.

Privacy

1. Agency will acknowledge the privacy rights of educational aid recipients which are expressed in the Federal Family Education Rights and Privacy Act (Title 20 United States Code, Section 1232g) as well as any state law(s).

Confirmed.

2. Agency will not release student records or any information from student records without full compliance with all Federal and State privacy laws and written approval from the University prior to disclosure.

Confirmed.



Appendices

Included with EAB's Response to Request for Proposal for Student Recruitment Retention Program and Consulting Services (2019-RFP-104)





Financial Aid Optimization Sample Monitoring Reporting

Contains Trade Secret and Confidential Information

APPENDIX

A



Yield IQ Sample Reporting Dashboards

Contains Trade Secret and Confidential Information

APPENDIX

B



Enrollment Marketing Sample Reports

Contains Trade Secret and Confidential Information

APPENDIX

C

Enrollment Marketing Sample Reports



EAB's Staff

Contains Trade Secret and Confidential Information

APPENDIX

D

EAB's Staff



Adult Learner Recruitment Overview

Contains Trade Secret and Confidential Information

APPENDIX

E

EAB's Adult Learner Recruitment Services



Enrollment Marketing Implementation Timeline

Contains Trade Secret and Confidential Information

APPENDIX

F

EAB's Enrollment Marketing Implementation Timeline



Navigate Implementation Timeline

Contains Trade Secret and Confidential Information

APPENDIX

G

Navigate Implementation Timeline



Navigate Technical Evaluation Guide

Contains Trade Secret and Confidential Information

APPENDIX

H



EAB

Student Success Collaborative

Technical Evaluation Guide

- EAB and EAB Technology at a Glance
 - Technical Implementation Timeline and Process
 - Key Roles and Responsibilities
 - Member Resource Requirements
-



▶ **Start with best practices research**

- > Research Forums for presidents, provosts, chief business officers, and key academic and administrative leaders
- > At the core of all we do
- > Peer-tested best practices research
- > Answers to the most pressing issues

▶ **Then hardwire those insights into your organization using our technology & services**

Enrollment Management

Our **Enrollment Services** division provides data-driven undergraduate and graduate solutions that target qualified prospective students; build relationships throughout the search, application, and yield process; and optimize financial aid resources.

Student Success

Members of the **Student Success Collaborative** use research, consulting, and an enterprise-wide student success management system to help students persist, graduate, and succeed.

Growth and Academic Operations

Our **Academic Performance Solutions** group partners with university academic and business leaders to help make smart resource trade-offs, improve academic efficiency, and grow academic program revenues.

1.2B⁺

Student interactions annually

1M⁺

Individuals on our student success management system

1,400⁺

Institutions we are proud to serve

1

Goal: Make education smarter

A Comprehensive Approach to Driving Change

EAB's Student Success Management System: Navigate

Data and Analytics at the Center of a Scalable Student Success Solution

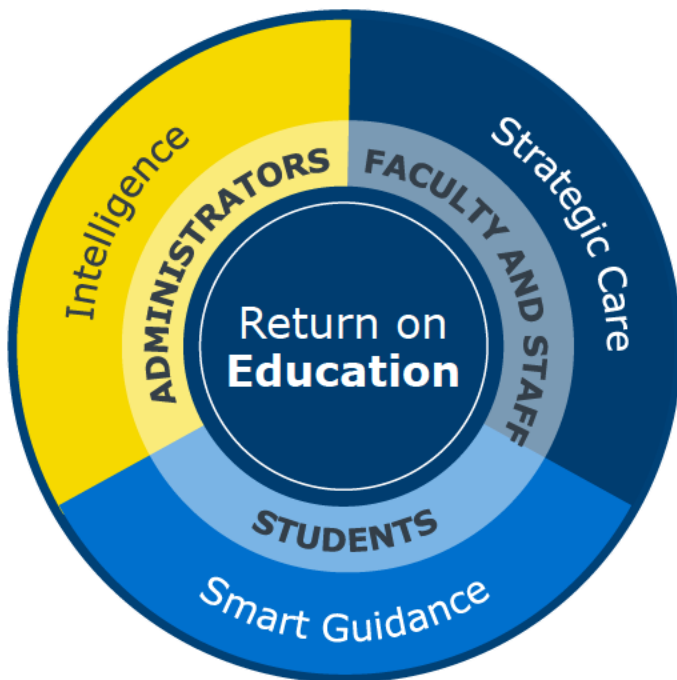
Taking Comprehensive Student Data...

2

...Transforming It Into Actionable Intelligence...

3

...to Empower the Entire Institution



For Advisors and Specialists:
Student Success Platform

- Access key data at a glance
- Highlight hidden risk factors
- Target proactive interventions
- Track case referrals



For Students:
Mobile App

- Provide personalized guidance
- Proactively prompt action
- Automate interventions
- Connect to services



For Academic Leadership:
Analytics and Reporting

- Surface root cause problems
- Spotlight target populations
- Prioritize new investments
- Monitor progress to goals



For Students:
Academic Planning

- Surface root cause problems
- Spotlight target populations
- Prioritize new investments
- Monitor progress to goals



For Prospective Students:
Transfer Portal

- Surface root cause problems
- Spotlight target populations
- Prioritize new investments
- Monitor progress to goals

Data Flow with EAB

Implementation Overview

EAB Data Integration Process

The Navigate Support Model

Member Technical Resource Requirements

Estimating Your Team's Required Contributions



Appendix

Data Requirements
Application and Data Security Briefing

Data Element Overview

Standard Extractable Format Required For Academic Plan Templates

Registration Set Up Overview *(if applicable)*

Application and Data Security Briefing



Washington DC | Richmond | Birmingham | Minneapolis

P 202-747-1000 | **F** 202-747-1010 | eab.com



EAB's Exceptions to NMSU's Terms and Conditions

Contains Trade Secret and Confidential Information

APPENDIX

I



January 22, 2019

Javier Cordero
New Mexico State University
2850 Weddell Drive S., Suite 100
P.O. Box 30001 MSC 3890
Las Cruces, NM 88003

Dear Mr. Cordero,

Re: Requested Modifications to RFP Terms & Conditions

EAB Global, Inc. (“**EAB**” or “**we**”) is pleased to respond to New Mexico State University’s (“**Client**” or “**you**”) Request for Proposal (the “**RFP**”) for Student Recruitment Retention Program and Consulting Services (the “**Services**”). This letter contains EAB’s proposed changes to the terms and conditions included in the RFP and we agree to negotiate the terms of any agreement awarded under the RFP (“**Agreement**”) in good faith.

