



Upon award of this proposal, and upon execution of a mutually negotiated Master Agreement ("MSA") between the Blackboard and Southeast Missouri State University, the MSA shall take precedence and govern in the event of a conflict.

REQUEST FOR PROPOSAL 5989

DELIVERY INSTRUCTIONS

TITLE: ONLINE PROGRAM MANAGEMENT

DATE: JULY 26, 2022

BUYER: AMY HANCOCK

EMAIL: abhancock@semo.edu

PHONE: (573) 651-2021

PROPOSAL MUST BE RECEIVED NO LATER THAN:

DATE: AUGUST 24, 2022

TIME: 3:30 P.M.

For USPS/FedEx/UPS, etc.

**Proposals must be mailed to:
Purchasing Department**

**Southeast Missouri State University
One University Plaza, Mail Stop 3280
Cape Girardeau, MO 63701**

OR delivered by offeror to:

**Purchasing Department
Academic Hall Room 200F
Normal Avenue
Cape Girardeau, MO 63701**

The notice of award is made subject to availability and appropriation of funds, as specified in the Request for Proposal, and the selection of the offeror is made in accordance with all applicable public procurement laws.

MUST BE SIGNED TO BE VALID

The offeror hereby agrees to furnish items and/or services, at the firm, fixed prices quoted, pursuant to all requirements and specifications contained herein, upon either the receipt of an authorized purchase order from the Purchasing Department or when this document is countersigned by the Purchasing Department as a binding contract, and further agrees that the language of this document shall govern in the event of a conflict with his or her proposal. Additionally, the authorized signer of this document certifies the contractor (named below) and each of its principles are not suspended or debarred by the federal government.

AUTHORIZED SIGNATURE <i>Michael Pohorylo</i>		PRINTED NAME/TITLE Michael Pohorylo, Dir, Associate General Counsel	
COMPANY NAME Anthology		CURRENT DATE 8/22/2022	
MAILING ADDRESS 11720 Plaza America Drive		TELEPHONE NUMBER/EXT. 800-424-9299	
CITY Reston	STATE VA	ZIP CODE 20190	
CONTACT PERSON Heidi Erbert		CONTACT PERSON EMAIL ADDRESS herbert@anthology.com	
DELIVERY DATE: _____ DAYS ARO, FOB DESTINATION		PROMPT PAYMENT TERMS: _____% _____ DAYS NET _____ DAYS	
NOTICE OF AWARD (SOUTHEAST MISSOURI STATE UNIVERSITY USE ONLY)			
AUTHORIZED SIGNATURE FOR SOUTHEAST MISSOURI STATE UNIVERSITY			DATE

T 800.424.9299
F 703.956.9369

Anthology Inc.
11720 Plaza America Drive
Reston, VA 20190
Anthology.com

Blackboard

August 24, 2022

Amy Hancock
Senior Buyer
One University Plaza, Mail Stop 3280
Cape Girardeau, MO 63701

Dear Ms. Hancock,

On behalf of the Anthology team, I would like to thank you for providing us with the opportunity to respond to the Southeast Missouri State University request for proposal. We understand that you need an experienced online higher education partner who will drive and increase enrollment and student completions through online programs. We are excited about the opportunity to demonstrate Anthology's ability to meet your needs and look forward to the opportunity to develop a partnership with your campus.

Our team is deeply experienced in delivering online instructional design, marketing, enrollment and retention solutions for institutions like, Wichita State, Baylor University, Texas Tech University, Syracuse University and Rutgers University. As your online program experience partner, we hold ourselves accountable not just for top of funnel metrics, but for enrollments, revenue and return on investment at the programmatic, school, campus and institutional level.

In the proposal that follows, we share our approach that will support your delivery, awareness, enrollment growth and student success goals across your 40 online programs. We are grateful for the opportunity to demonstrate our capabilities as a partner who can provide industry-leading solutions to support your goals around academic excellence and student success for learners in the Southeast Missouri region and beyond.

Sincerely,

Heidi Erbert

Heidi Erbert
Account Executive

Anthology Online Program Management

Proposal for Southeast Missouri State University

Request For Proposal 5989, Online Program Management

Presented to:
Amy Hancock
Senior Buyer
Purchasing Department
Southeast Missouri State University
One University Plaza, Mail Stop 3280
Cape Girardeau, MO 63701

Presented by:
Heidi Erbert
Regional Sales Manager
11720 Plaza America Drive
Floor 11
Reston, VA 20190
herbert@anthology.com
716-501-5330

Anthology Inc.

August 24, 2022

TABLE OF CONTENTS

Executive Summary	1
1. Institutional Partnership.....	3
2. Program Marketing	20
3. Enrollment	24
4. Student Support.....	27
5. Faculty And Academic Support.....	29
6. Financial	31
Required Forms.....	32
Attachment 1 – References	32
Attachment 2 – Vendor Business Information	35
Attachment 3 – Affidavit of Work Authorization	39
Comments and Clarifications	56
Anthology Appendices	57
Appendix 1 – Case Study Rutgers University	
Appendix 2 – Case Study Texas Tech University	
Appendix 3 – Case Study UTEP	
Appendix 4 – Case Study Wichita State University	
Appendix 5 – Case Study Johns Hopkins University	
Appendix 6 – Anthology Transfer Protocol	
Appendix 7 – Case Study Wayland Baptist University	
Appendix 8 – Case Study Walden University	
Appendix 9 – Rate Card	

EXECUTIVE SUMMARY

It is our pleasure to produce this response to Southeast Missouri State University RFP for online program management. We see tremendous potential in your new Strategic Action Plan and believe Southeast Missouri State University deserves a partner who matches its commitment to creative, innovative and transformative education. Anthology is that partner — and we are tremendously confident in our ability to activate data-driven marketing, enrollment and course design strategies that produce measurable return and are befitting of an institution that is taking deliberate steps to continue to **transform its academic offerings to remain a destination institution.**

We understand well the challenges that are facing institutions like Southeast Missouri State University face as they work to strengthen their foothold in the online marketplace. We recognize, too, the cascading impacts that any potential partnership could have on the long-term health of the institution and its ability to direct the course of its own online future. **As the cost to recruit and enroll online students has skyrocketed, the online program management (OPM) model has begun to break down — even for the elite brands represented by the largest OPMs.**

The rapid proliferation of online programs that has only gained acceleration amidst the COVID-19 pandemic means that every time another program launches, another mega-university increases ad spend, or another institution enters the digital advertising space, the cost to acquire a student increases even further. More and more, we see this rapid increase in marketing, enrollment and program development costs render the revenue sharing model impossible to sustain for all parties. These events represent a clear signal to higher education institutions that there is an emerging need for new models of online partnership.

This response represents a significant departure from the traditional OPM model for marketing, enrollment and program development partnerships. As a company with a 20-year track record exclusively in higher education, we've demonstrated our ability to move where the market is going. Anthology OPX now poses an alternative pathway. We don't rely on revenue-sharing agreements that position the vendor to "win," often at the partner's expense. Instead, we employ fee-for-service pricing models that ensure we collaborate, strategize and grow in harmony with your institutional values and available resources. As revenue gains are realized in this model, they can be reinvested into online programs and, over time, the university can scale for growth on its own. Underlying this approach would be Anthology's commitment to helping Southeast Missouri State University develop its own internal capabilities through clear roadmaps to improvement and well-defined partnership responsibilities.

With Anthology, Southeast Missouri State University will have a cohesive, in-house team that is accountable, responsive and strengthened by the kind of symbiotic dynamic that can only come from regular, transparent interaction. This level of comprehensive in-house capability underpins our approach to integrated solutions, allowing us to work from the same data, share common objectives, and react with speed to market shifts. Further, that's why we apply a distinctive approach to formulating growth solutions. **We take the time to conduct a full assessment of your admissions environment, data-tracking capabilities, program landscape and enrollment growth infrastructure before any enrollment projections are made to ensure solutions are crafted with a holistic vision of your online environment and that your investments are allocated with purpose and effect.**

Along the way, the mission and identity of Southeast Missouri State University will be central to the success of this partnership. As a true strategic partner that views itself as an extension of your team, Anthology will take

the time to learn and understand Southeast Missouri State University at a much deeper level than typical online partnerships. **The Anthology OPX approach is a departure from the traditional online model, but we are confident that Southeast Missouri State University will not find this level of committed, mission-supportive partnership in any other vendor.**

1. INSTITUTIONAL PARTNERSHIP

a. Describe your process for working with a campus to develop online academic programs and establish enrollment goals for the programs.

Anthology OPX employs a fee-for-service pricing model that ensures we collaborate, strategize and grow in harmony with your institutional values and available resources. We don't rely on revenue-sharing agreements that position the vendor to "win," often at the partner's expense. Instead, as revenue gains are realized in this model, they can be reinvested into online programs and, over time, the university can scale for growth on its own. Underlying this approach would be Anthology's commitment to helping Southeast Missouri State University develop its own internal capabilities through clear roadmaps to improvement and well-defined partnership responsibilities.

Strategy & Market Planning:

Enrollment growth is best achieved when programs and portfolio strategies are developed in consideration of market, competitive and consumer insights. At Anthology, we have a team of programmatic experts, research specialists and analytics technicians who are skilled at discerning the kinds of data that best inform an institution's growth objectives. We compile and present the data in a digestible and relevant fashion that helps clarify which solutions are both financially feasible and aligned to your institutional vision.

Anthology believes in a comprehensive, multidimensional approach to research that considers individual programs as well as broader market trends while collecting inputs from a multitude of sources:

- **Portfolio Health Dynamics:** Portfolio segmentation into market-need categories and a diagnostic assessment of conferral trends as an indicator of institutional strength for supporting future growth. Includes a high-level regional evaluation of Southeast Missouri State University's top conferring programs.
- **Regional Market Assessment:** In-depth evaluation of market dynamics to inform growth strategies based on regional evolution and market-based needs for skilled professionals.
- **Program Viability Reviews: Dive Deeper into Opportunities for Current Programs:** An assessment in which programs that are currently in the portfolio are segmented based on market evidence supporting general degree potential for growth. Such assessments represent a complete evaluation of consumer, employer and competitor factors that can impact enrollment for particular degrees.
- **Portfolio Expansion Strategy: Explore Opportunities for New Programs:** The Portfolio Expansion Strategy is intended to identify program opportunities that lie outside the existing portfolio. Using the most recent IPEDS completion (or conferral) data, Collegis assembles state and national dynamics as well as partner-specific trends to uncover "best fit" programs for expanding beyond current offerings.
- **Program Opportunity Assessments: Guiding the Launch Decision:** These assessments are designed to help partners decide whether market dynamics support the ability to launch — and then recruit for — a specific academic program identified during earlier assessments and selected by the partner.
- **Analyze program structure for current and proposed programs to determine desirability relative to competitors:** A high-level overview of each program's unique value and points of competitive differentiation.

- **Analyze marketing campaign performance to understand website engagement to improve conversion both from a historical perspective and ongoing.** With this level of funnel visibility, we can tie data to estimated lifetime revenue, form a picture of acceptable acquisition costs, and build more reliable investment and enrollment models.
- **Financial Modeling & Enrollment Projections:** In this process, both sides come together and agree on the desired enrollment numbers, estimated acquisition costs by marketing channel, required number of enrollment coaches, estimated conversion rates and (ultimately) cost per enrollment. From here, we can build a forecast and define discrete areas of scope for both Anthology and Southeast Missouri State University. We are fully transparent with costs of services as well as how marketing dollars will be spent.

Course Design and Development Support

Work with our team of instructional designers, educational consultants and course developers to create learning experiences based on industry and educational best practices. Our Course Design and Development Portfolio includes services that range from temporarily extending your team to the full development of highly interactive online courses. Our project management methodology ensures quality and innovation by embedding feedback iterations and testing at every stage.

Custom Course Creation:

You'll receive a complete course, making it easy to scope and plan your requirements. Benefits include Agile discovery workshops and a dedicated instructional designer. Our knowledge of best practices in online education and key modalities. Rigorous and efficient testing that ensures certainty of your institution's acceptance.

- Agile discovery workshops and a dedicated instructional designer.
- Our knowledge of best practices in online education and key modalities.
- Rigorous and efficient testing that ensures certainty of your institution's acceptance.

Institutional Course Review

A Course Report is provided for each course and includes a rating of "achieved" or "not achieved" for each standard, total points earned, and comments for standards that were not achieved. Benefits include:

- Consistency in the student experience across your online courses.
- Best practices in course design, making the most of your LMS while allowing your educators in building exemplary courses with easy-to-follow guides.

b. Describe how you have partnered with other universities similar to Southeast Missouri State University to offer components of a robust online program management program, including course design, video and digital asset production, marketing, recruitment, student support, and program evaluation.

Anthology's approach to marketing, enrollment, course design and student success services is focused on enriching the learner's educational journey through every touch-point, designed to deliver quality leads, applicants and ultimately enrollments for institutions. Our vision is to deliver a comprehensive marketing strategy and campaign that unites the program portfolio, matches the right program to the right prospective

student, maximizes full-funnel performance (in terms of applicants, enrollments and tuition dollars) across the programs and generates cost efficiencies from a unified approach.

Anthology has the staff and experience to deliver excellent results and seamless execution to Southeast Missouri State University. We are highly experienced in leveraging research-led marketing strategy to perform targeted lead generation and media management, and we have a proven track record of helping institutions expand enrollment through cost-effective and targeted marketing campaigns.

Through the support we provide our other university partners both strategically and practically as we interact with students and potential students more than eight million times each year, we have come to understand the nuances of excellent prospective student support and service. We believe this robust enrollment counseling and differentiate online programming is integral to the success of enrolling and retaining students.

Anthology's Digital Teaching and Learning Series also delivers world-class professional development and certification for teachers and associated support staff in the use of digital learning technologies. It enables institutions to support the delivery of the highest standards of teaching and learning. The series of three certified professional development courses aids academic staff in meeting the demanding digital literacy expectations of 21st Century students.

Anthology delivers the most flexible, effective, scalable marketing, enrollment and course design solutions in the higher education market because we have a deep understanding of how the components of the student lifecycle, from both the institutional and student perspective, are inextricably related and interdependent. Executed well, strategic marketing fuels our partner institutions' financial stability, academic excellence, faculty professional development and advancement, as well as student success and increased access. We don't simply deliver staffing, expertise, support, processes, and management components—as your partner, we intimately understand how these offerings best align with the University's strategic objectives and work as extensions of your team.

The OPX division of Anthology began in 2004 and has grown to include a client base of over **200 colleges and universities**. Originally founded as a student support provider, over the past 15+ years this division has supported millions of student interactions and in the past year fielded over 8+ million unique interactions. Over the past 5 years, this division has built out an elite marketing and enrollment services unit that has supported enrollment growth and positive ROI for leading 2-year and 4-year institutions. The strength of the OPX division stems from our team's focus on performance-based marketing and full funnel results, as well as transparency with our partners. Our team brings higher ed, both for-profit and non-profit, and corporate marketing expertise, which informed our fee-for-service, performance-focused, full funnel marketing approach.

Included below are two specific examples, in case study form, of how we have partnered with universities similar to Southeast Missouri State University.

Appendix 1 – Case Study Rutgers University

Appendix 2 – Case Study Texas Tech University

c. Provide a listing of your current contracted higher education partners and the online programs currently offered or anticipated to be offered in the next 12 months.

As mentioned in question “b” above, Anthology has more than 200 college and university partners across the country. Anthology, however, respects the wishes of those partners who wish to remain anonymous for competitive reasons. A selection of current clients includes:

- Baylor University
- Rutgers University
- Rice University
- Texas Tech University
- University of the District of Columbia
- Syracuse University
- Wayland Baptist University
- Wichita State University
- Coppin State University
- North Carolina Central University
- Community College of Los Angeles (CCLA)

d. Describe the range of online program offerings your firm has experience in developing.

Through marketing and enrollment, we support programs in the following categories and degree types:

Academic Categories:

- Business
- Criminal Justice
- Education
- Engineering & Computer Science
- Humanities
- Law
- Nursing
- Social Work
- Social Sciences
- Seminary

Degree Types:

- Associate
- Undergraduate
- Undergraduate Certificates
- Graduate Certificates

- Doctorate
- Non-credit

e. Describe the process(es) used by your firm to ensure other university partners under contract with your firm do not offer the same programs or that the program offerings do not compete for the same students.

As a fee-for-service provider, Anthology partners with each institution as a unique partnership. We provide dedicated coaches to our partners and do not share leads generated by our marketing and enrollment efforts across our partner universities. Upon review of the programs outlined at Southeast Missouri State University, we can confirm that there are no direct competing programs within the region that would be cause for concern.

f. Describe your capacity for launching new academic programs in a year.

With more than 500 employees and comprehensive capabilities across the landscape of higher education services, Anthology can form agile and adaptable staffing plans for its partners. Throughout the partnership, Southeast Missouri State University will have access to a single point of contact who will be supported by a dedicated team of subject matter experts. In fact, one of our greatest strengths is the interconnectivity and flexibility that our in-house team brings to the partnership. The ability for us to pivot quickly based on data within this partnership is a key competitive advantage for our partners. Further, we pride ourselves on being a collaborative, transparent organization that helps partners build their own competencies across functional areas, which only strengthens the entire enrollment ecosystem.

g. Describe the typical implementation plan and your proposed implementation timeline.

MARKETING AND ENROLLMENT

The timeline for implementation of marketing and enrollment services is approximately 12 weeks (three months). To ensure timelines are met during implementation, many of the implementation work streams will be conducted concurrently by Anthology and Southeast Missouri State University. During the implementation phase, Anthology will assign a senior project manager to manage all elements of the implementation. They will be responsible for developing the project plan, ensuring accountability to deadlines, and working with all key stakeholders to ensure updates and deliverables are met.

Although we have created a repeatable process as part of onboarding new customers, we also recognize each engagement with a new customer (even if the institution is a current customer) is an opportunity to identify process improvements. Provided below are specifics related to these core processes:

Kick-Off – One to Two Days

Implementation for supporting Southeast Missouri State University will begin with a formal kick-off, designed to establish clear expectations of ownership, timeline, and deliverables. For this session, Anthology and Southeast Missouri State University key personnel will together establish the framework for this engagement, discuss technology integration, and define the critical metrics sought to monitor and measure success. After kick-off, the Anthology project manager will create and provide the project plan which includes all work streams, dependencies, milestone dates, resources required for each team, and accountabilities.

Discovery – Three to Four Weeks

Anthology will provide Southeast Missouri State University with a pre-discovery packet of questions. Southeast Missouri State University will make available subject matter experts from each of the schools/programs, providing as many answers to questions as possible prior to discovery meetings being held onsite. After completed discovery packets are provided back to Anthology, onsite visits will be scheduled with the Southeast Missouri State University team(s), to review answers and to clarify or ask any additional questions Anthology has. The Anthology team will work closely with representatives from Southeast Missouri State University to gather the data, policies, and procedures that support the Southeast Missouri State University community.

During these onsite discovery meetings, we will also discuss the infrastructure for workflows, tier 1 and tier 2 escalations processes, and how best to build out the tools needed to capture meaningful metrics. We will work with Southeast Missouri State University to determine training needs for each of the schools and programs. After those meetings conclude, the Anthology team will begin work to identify and develop all necessary infrastructures, knowledge base and training materials, call scripts and communications, and integration of necessary tools.

Marketing & Media Strategy, Creative Development, Microsite Build—Eight Weeks**Media Strategy**

In addition to the insights gathered during the discovery phase, we'll audit the performance of previous campaigns or always-on strategies for paid, earned, owned, and shared media, as well as existing partnerships that may be leveraged in new or different ways. This will help us identify quick-wins, programs to maintain and optimize, and uncover new opportunities. This, paired with the audit of content, landing pages, and other assets, will inform additional recommendations to the media strategy and how we can drive people to convert/engage. We'll use our best-in-breed tools and considerable media-buying experience to inform our channel strategy and planning, our buying rationale and competitive lens.

Creative Development & Microsite

In tandem with the development of the media plan, our creative team will be developing 2-3 concepts that will bring the Southeast Missouri State University brand and programs to life in a new advertising campaign. In order to deliver on the requirements of the marketing plan, Anthology will work with Southeast Missouri State University to execute appropriate creative assets, perform the campaign set-up, develop ad copy and creative, and create landing pages with Request for Information components based on agreed upon program groups. Media and creative are focused on driving prospects to landing pages and/or driving prospects to call. Reporting will be made available to show campaign results including form completion rate. Landing pages will be continuously optimized to drive form completion rates. All creative will be developed to meet established brand and creative guidelines and includes review and approval with designated Southeast Missouri State University representatives.

Enrollment Support Recommendations and Content Build – Eight weeks

During the support recommendations and content build phase, Anthology will work with Southeast Missouri State University subject matter experts and stakeholders to build, review, and sign-off on the various components of support, including content, scripts, training materials, and the knowledge base. Each of these items are listed below with additional information:

- **Communication Plan Development**

Anthology and Southeast Missouri State University will work together to document all current communication efforts. Anthology will provide Southeast Missouri State University stakeholders with a recommended communication plan, including frequency and modalities of outreach to prospective students to optimize engagement rates and application conversion. This plan will also include reengagement campaigns of aging inquiries based on program-specific deadlines and campus activities, such as open houses.

- **Promotional Content Development**

In parallel with the development of the communication plan, Anthology will provide recommendations on promotional content to support the inquiry management process. This content will include custom scripts for inbound and outbound phone calls, as well as marketing emails for each of the programs supported. Southeast Missouri State University and Anthology will collaborate to review promotional content currently available for Southeast Missouri State University programs and identify content that needs to be created to support prospective student engagement and increase conversion. Anthology will provide all resources in the implementation process to develop email templates and customized collateral. Southeast Missouri State University will have a quality review and approval process for all promotional content and scripts that will be used in the inquiry management process.

- **Knowledge Base Development**

Anthology will provide Southeast Missouri State University with a service catalog of information needed to expertly represent Southeast Missouri State University programs. Examples of information requested in the service catalog may include program-specific information, application deadlines, financial aid processes, and course descriptions. Anthology will collaborate with Southeast Missouri State University to define information that should be included in the enrollment coach knowledge base to support students through the inquiry-management process. Southeast Missouri State University program subject matter experts will provide content to complete the service catalog. Once feedback is received from Southeast Missouri State University, Anthology will format and convert that information into a knowledge base that will be used to support prospective students.

Technology and Data Integration – Four to six weeks

Building a foundation for tracking and measuring enrollment performance has become a critical element of sustainable enrollment growth and overall institutional health. In a challenging landscape institutions need high-quality, high-integrity data that yield clear, accurate insights.

During the technology and data integration phase, Anthology will work with Southeast Missouri State University to identify and build any technology requirements needed to support enrollment coaching of prospective students. This will include telephone numbers, phone routing, CRM setup and/or integration, and reporting. During this phase, Southeast Missouri State University and Anthology IT representatives will work together to ensure successful setup and testing and provide sign off prior to going live with support services.

Anthology would build this infrastructure by following our proven playbook for achieving full-funnel visibility and a high-performing data analytics environment. Anthology would step through all data systems you listed in your RFP to understand how they connect and how data flows (as well as where it doesn't). We will also help define and document a roadmap for completing key integrations.

- **Communication Technology Configuration**

Anthology will provide all communications technology and configuration required to optimize engagement rates in the inquiry management process, including phone numbers, phone tree configuration, online chat tools, mobile-to-mobile texting tools, and email tools. Anthology will collaborate with Southeast Missouri State University to identify the preferred method for email masking in case Anthology's coaches will send emails directly to prospective students.

- **Software Configuration**

Anthology will provide resources for any software configuration required to manage scheduling of outreach calls or timed execution of emails. Anthology will provide all customer service software tools required to execute phone and email communication plans.

- **Systems and Data Integration**

Anthology will collaborate with Southeast Missouri State University to determine the best method to securely share information between technology systems as well as the types of information that should be shared. This step will require IT resources from both organizations.

- **Report Customization and Development**

Anthology will provide recommendations on weekly and quarterly reports on key performance metrics as well as collaborate with Southeast Missouri State University on the preferred format and frequency of business reports.

Staffing, Training, and Operations – Six to eight weeks

During the staffing, training, and operations phase, enrollment coaches will be identified, hired, trained, and certified by Anthology. Southeast Missouri State University stakeholders are welcome to participate in training if desired.

- **Coach Selection, Training, and Certification**

Anthology will select coaches and provide training utilizing content developed in collaboration with Southeast Missouri State University program stakeholders. New coaches will be certified by Anthology prior to the go-live date of support. Southeast Missouri State University will have the option of being involved in the training and certification process, if desired.

- **Quality Assurance Process Review and Customization**

Anthology will collaborate with Southeast Missouri State University to review our current quality assurance process, including review of recorded calls and quality scoring. Anthology can customize the quality assurance process as needed to achieve conversion rate goals and assure stakeholders that Southeast Missouri State University programs are being represented appropriately.

Go-live and Feedback – Four to six weeks

After services are launched, we will engage in a 30- to 45-day go-live and feedback period, during which Anthology account management, implementation, and operations teams will closely monitor performance and engage in 360-degree feedback exercises. These exercises will allow both our staff as well as Southeast Missouri State University teams to gauge the success of the implementation and the on-going effectiveness of the Anthology service.

Execution and Ongoing Support

The final phase of implementation is the ongoing support and maintenance for the partnership. Led by the senior manager and the account executive, this phase continues to focus on Southeast Missouri State University goals, as well as identifying, developing, and deploying solutions to meet those goals.

Armed with an overarching strategic approach to finding the right prospects, creative that will resonate with target audiences, advertising that will cover relevant digital channels, enrollment team trained to support prospective students and a campaign measurement and reporting plan — we’ll be ready to launch in market.

For ongoing campaign management, campaign specialists will oversee the day to day performance of media in-market, reporting against various KPIs and suggesting opportunities to optimize or create tests.

Student Support

Implementations for One Stop and Help Desk Services follow separate timelines, however if both services are implemented, the timelines can be combined to a certain extent. Below are details for each separate timeline of the services.

• **Help Desk**

Help Desk implementations take an approximate timeline of 8 weeks with some tasks occurring concurrently during the implementation process.

HD/OS Kickoff & Planning (1 week)	Content Development (6 weeks)	Technical Development HD Go-live (5 weeks)	Testing & Sign-off (2 weeks)	OS Training & Go Live (2 weeks)
<ul style="list-style-type: none"> Identify engagement teams Assemble project resources Review support scope Identify program risks (internal and external) Deliver project plan and timeline 	<ul style="list-style-type: none"> Outline and collect required documentation and knowledge relative to scope Streamline and update processes Determine technology needs Analyze support volume 	<ul style="list-style-type: none"> Compile and refine knowledge base Design, configure, and implement technology (CRM, Telephony, Reporting, Access) Generate forecast and staffing plan Design and develop training curriculum Launch HD Services 	<ul style="list-style-type: none"> Review knowledge base and sign-off Test technology and sign-off Execute staffing plan 	<ul style="list-style-type: none"> Review training and deliver Certify agents Launch One Stop support services Transition to account management team Deliver marketing and communications materials

• **One Stop**

One Stop implementations take an approximate timeline of 16 weeks with some tasks occurring concurrently during the implementation process.

Kickoff & Planning (1 week)	Content Development (6 weeks)	Technical Development (5 weeks)	Testing & Sign-off (2 weeks)	Training & Go Live (2 weeks)
<ul style="list-style-type: none"> Identify engagement teams Assemble project resources Review support scope Identify program risks (internal and external) Deliver project plan and timeline 	<ul style="list-style-type: none"> Outline and collect required documentation and knowledge relative to scope Streamline and update processes Determine technology needs Analyze support volume 	<ul style="list-style-type: none"> Compile and refine knowledge base Design, configure, and implement technology (CRM, Telephony, Reporting, Access) Generate forecast and staffing plan Design and develop training curriculum Design & develop marketing & comm. plan 	<ul style="list-style-type: none"> Review knowledge base and sign-off Test technology and sign-off Execute staffing plan 	<ul style="list-style-type: none"> Review training and deliver Certify agents Launch support services Transition to account management team Deliver marketing and communications materials

h. Describe the process for evaluating the success of an online program and the benchmarks used to evaluate a program’s success.

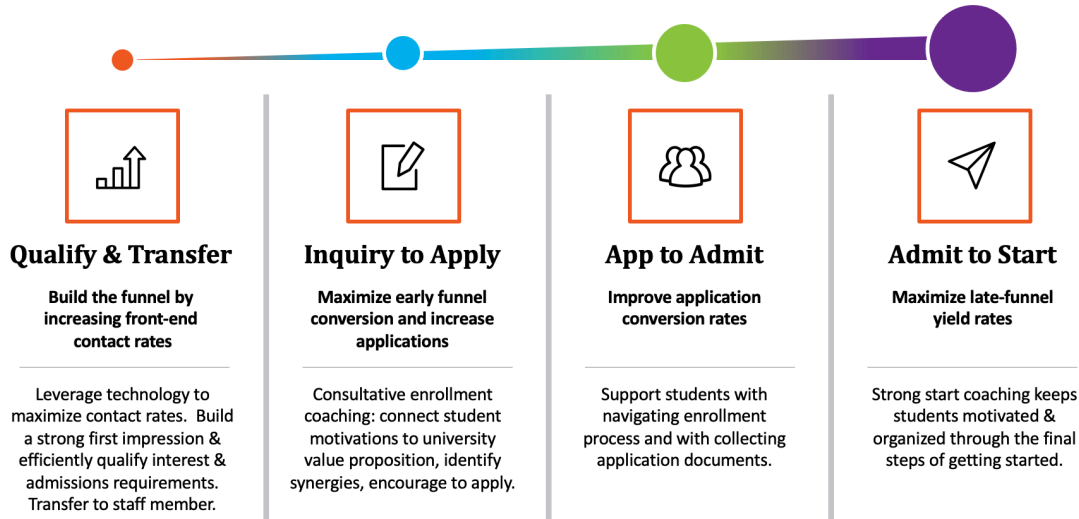
From day one we immediately begin to assess performance. Our campaign analysts and specialists will review data to see what’s performing and what isn’t and will begin making optimizations and recommendations that will help us double down on what’s resonating and leave behind what’s not.

You’ll be able to track all of this through our weekly/monthly reporting which we’ll set up for you. These dashboards give various stakeholders full visibility into valuable data points pulled from Google analytics and AdWords, display networks, social channels, CRM platforms, email marketing platforms, and other touch points deemed relevant to the goals of the campaign.

In addition to a report, we’ll review progress during weekly status calls with your team, and we’ll produce monthly performance reports that track our progress against KPIs and make recommendations for future enhancements and optimizations.

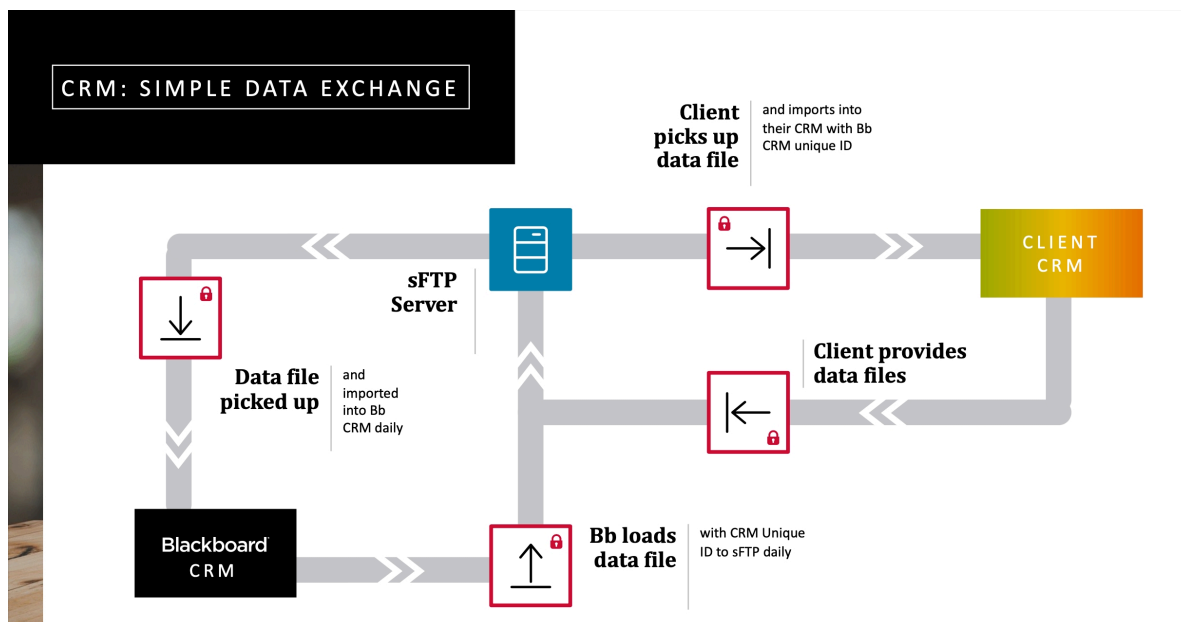
This visibility will give us the insight we need to start to impact the important conversion points with prospective students.

Our Enrollment Services



i. Describe your ability to interface with the University’s student information system (Banner), the University learning management system (Canvas), and the ability to interface with the University’s customer relationship management system (Element 451).

Anthology works with the institutions existing platforms and develops a data exchange process.



j. Provide the background and experience of the proposed individuals that would be assigned to the University as part of this partnership.**Institutional Partnership:****JOHN FLOYD - Executive Sponsor****Regional Vice President, North America Higher Education**

John Floyd currently serves as the Regional Vice President for Higher Education for Anthology serving hundreds of higher education institutions the last 17 years. He focuses on helping institutions strategically solve complex problems around teaching and learning, student success, and institutional success utilizing technologies and services as a trusted partner and connector. John earned his bachelor's and Master's degrees from St. Edward's University in 2004 and 2006 respectively. He taught in the Business Management program at the community college level and recently earned his EdD in Education Leadership at Lamar University, focusing on institutional responsibility for student success.

RICHA BATRA - Executive Sponsor**VP and General Manager, Student Success**

Richa Batra is the General Manager and Vice President of the Student Services division of Anthology that provides support to the entire student lifecycle from Marketing, Enrollment, Financial Aid and Technical Support. Richa oversees Implementations, Contact Center delivery and Client Success at Anthology Student Services. Prior to coming to Blackboard in 2009, Richa worked in the Professional Education space as the Director of Corporate Membership at The Association for Talent Development. Richa has more than 15 years of experience in client success in the education space. Richa holds a B.A. from the University of Maryland and an M.B.A. from George Washington University.

Course Development Services:**BETSY ZISKIND****Senior Manager, Course Development Services**

As Senior Manager of the Course Development Services team, Betsy oversees a team of instructional designers who work with clients and subject matter experts to design and develop quality courses in the online environment. Betsy has 15 years' experience in education and instructional design. She has worked in both K-12 and higher education in the classroom, as an instructional technologist, instructional coach, and before taking on the management of the Course Development Services team, as a Senior Instructional Designer at Blackboard + Anthology.

PENNY PELLIS**Instructional Designer**

Penny Pellis is an instructional designer and educator with 15 years of experience in higher education. Penny consults with faculty and subject matter experts in a variety of fields to develop effective, high-quality online courses. She is passionate about designing online experiences that are engaging for both instructors and students. Penny holds an M. A in Teaching and a graduate certificate in Instructional Design.

MIKE HIGHFIELD**Principal Instructional Designer**

Mike Highfield is Principal Instructional Designer, delivering services across the EMEA and North American regions for institutions in higher, further, K-12, and professional education sectors. Mike specializes in course design with a background in designing MOOCs, but he also has extensive experience of strategies and best practices applicable course design and development. Mike teaches classes at the Anthology Academy and was a key contributor to the Digital Teaching and Learning Series

Marketing, Enrollment & Student Success:**REBECCA ROBINSON****Director, Marketing Strategy**

With more than twenty years of marketing experience, Rebecca Robinson excels at designing and implementing integrated marketing strategies rooted in data. Her work spans industries including agriculture, aviation, insurance, K-12 education, public affairs and non-profits.

Prior to leading the student success marketing team at Anthology, Rebecca directed efforts in brand strategy, omnichannel campaigns, direct response and database marketing, content marketing, and performance forecasting at several online program managers including Wiley and Pearson for nearly 300 graduate degree programs and dozens of top-ranked universities.

MEGEAN SYNDER**Director, Educational Consulting**

Meagan Snyder is a marketing and media services leader with more than 20 years of experience with marketing communications, marketing strategy, digital marketing, analytics and event marketing. Meagan has been with Blackboard/Anthology for 5 years, leading the paid media team supporting university partners. Prior to Blackboard, Meagan served in digital marketing leadership roles spanning multiple industries including B2B e-commerce, automotive, retail, financial services and entertainment. Meagan holds an M.B.A. from Walden University and a B.S. in Mass Communications and Public Relations from Towson University.

JENNIFER BLASSINGAME**Director, Enrollment and Retention Performance**

Jennifer Blassingame has over 15 years of experience in Higher Education, focusing on Admissions, Student Services, and Retention. Before joining the Blackboard team, Jennifer worked as an admissions leader at various OPMs, serving as the VP of Enrollment Management for almost three years in her most recent role with Relearnit. Jennifer built the framework for the admissions and student success teams to communicate and operate efficiently, alongside building KPIs and threshold conversions to determine success. She provides a wealth of knowledge about how admissions and student success advisors should use communication strategies to nurture leads, applicants, and matriculating students. In addition, she has a strong passion for implementing a pragmatic approach to simplifying processes and improving the student experience. Jennifer received her bachelor's degree in Communication from Millikin University.

LISA HANSEN**Executive Director, Virtual Services**

Lisa has over 11 years of experience in Higher Education, with a focus in Student Services and Retention. Prior to joining the Blackboard team, Lisa worked at Wichita State University, serving as the Director of OneStop Student Services for 6 years and was a pivotal part in the Blackboard/WSU One Stop partnership since its beginning in 2014. She provides a wealth of knowledge about how our One Stop solution helps our institutional partners and their students. She has a strong passion for simplifying processes and improving the student experience and has presented to several campus organizations and at conferences for the Kansas Association of Collegiate Registrars and Admissions Officers (KACRO), American Association of Collegiate Registrars and Admissions Officers (AACRO) Strategic Enrollment Management, Blackboard World as well as Institute for Student Service Professionals (ISSP). Lisa received her bachelor's degree from Wichita State with an emphasis in Communication.

k. Describe how any sensitive data (e.g., authentication credentials, student ID numbers, credit card information, FERPA, HIPPA, or similar type information) is safeguarded and how this data would be stored on any devices external to the University.

Anthology Security establishes policy, procedures, governance and technical requirements to manage IT security risk across the business. Data Classifications are defined with requirements to protect each data type. Of highest sensitivity is our clients' data – the data of the institutions and their learners.

Increased controls are required for contact center staff:

- Agents in Anthology contact center facilities are subject to PCI requirements
- Remote agents are provided Anthology devices that are strictly locked down
- Configuration allows only the applications needed to perform their job functions;
- Unnecessary functionality is removed (media, print, wireless/Bluetooth drivers, camera, etc.)
- Contact center-specific training

As an international company serving the education community, Anthology closely monitors relevant geographic, privacy, and education-specific data protection regulations and guidelines.

Below are examples of security and privacy regulations, standards, and frameworks Anthology takes into consideration when developing policies, processes, and technical controls:

- Family Education Right and Privacy Act (FERPA), Protection of Pupil Rights Amendment (PPRA) - (Dept. of Ed)
- Children's Online Privacy Protection Act - (FTC)
- PCI, where applicable
- ISO/IEC, OWASP, NIST
- USG Standards – FedRAMP
- Student Data Privacy Pledge
- GDPR
- International standards (MTCS, IRAP)
- State Laws (Existing and emerging 50-state patchwork)

l. Describe any experience in working with universities on program or university level accreditation.

We do not currently offer this service and it would be the responsibility of the University.

m. Describe any experience in working with distance education compliance related to National Council for State Authorization Reciprocity Agreements (NC-SARA), secretaries of state, international policy, and other distance education compliance regulators.

We do not currently work in this space as we are strictly offering course development support. That said, our course design and development support apply rigorous and efficient testing that ensures certainty of client acceptance. We also apply standards of design quality against external benchmarks and accessibility standards.

n. Describe any recommended technology platforms, for course development, marketing, enrollment processing, or any other activity that are outside of the current platforms utilized by the University.

Our data and technology processes are designed to provide transparent and actionable insights and results, with no proprietary or additional platforms required. By responsibly leveraging data, our partnerships enable insights at the right time, in the right way, to support the right actions. We will work with the institution to create a simple data exchange that will provide full visibility into the marketing and enrollment funnel.

Below is a list of technical and creative considerations to ensure successful partnership successfully.

Technical & Creative Considerations

Microsite

- URL request process
- Hosting update process
- IT point of contact

Creative

- Logo files
- Photo library
- Brand guidelines
- Sample email communications
- Program brochures

Systems Integrations

- IT point of contact
- Access process
- Lead process map
- Email with .edu domain
- Form requirements
- Reporting workflows
- Pipeline expectations
- Communication flows and triggers
- CRM setup & access
- Admissions process documentation

Paid Media & SEO

- Google Analytics
- Google AdWords
- Facebook Business Manager*
- Google Search Console*

Research

- CIP codes for programs
- Recent research
- Student geographic breakdown
- Enrollment numbers by program

o. Provide a list of any legal actions taken against the company in the context of work as an online program manager, and the result of those actions, especially as related to cost to the institution, financial or otherwise.

Anthology is not involved in any litigation, past or present, that will impact its ability to provide the services at issue.

p. Describe the typical process for termination of the partnership, either after or before the full-term of the contract has expired, including contractual requirements, cost, timeline, and any known impacts to students and the institution.

As stated in Blackboard's (Anthology) standard Master Agreement for All Products and Services, under Section 9. Term and Termination, it reads:

- **9.1 Term.** The term ("Term") is defined in the applicable Order Form referencing the Agreement.
- **9.2 Termination for Breach.** If either party materially breaches any obligation under the Agreement, the non-breaching party may terminate the Agreement in its entirety, or, at the non-breaching party's option, it may terminate solely the relevant Product or Service pursuant to which such breach relates, provided in either case that such breach has not been corrected within thirty (30) days after receipt of a written notice of such breach. Notwithstanding the foregoing, Anthology may terminate the Agreement immediately upon written notice to you if you materially breach the provisions of the license usage restrictions set forth in the Agreement. Except for termination rights in this section, the parties have no other right of early termination.
- **9.3 Effect of Termination.** Upon termination of the Agreement or termination or expiration of any individual license, you and your Authorized Users will immediately cease access to the applicable Products and Services, and, unless such termination is due to Anthology's uncured material breach, you will immediately pay us all amounts due and payable for such Products and Services. Upon termination or expiration, unless expressly stated otherwise herein, each party shall promptly cease any use of and permanently delete, or upon the other parties' request, return the other party's Confidential Information and any copies to the extent commercially reasonable.

q. In cases where not all programs are managed by the partner, describe at what point the student is considered a partner student as opposed to an institution student (i.e., student gets recruited via partner advertisements but registers in a non-partner program, student has been a Southeast student before for multiple years but gets re-recruited as part of partner advertisements).

As a fee-for-service provider, all students are considered the institution's students at all stages of the funnel. Success measures will be set in place, in collaboration with the institution, to measure Anthology's performance with full visibility into the student lifecycle.

r. Describe the process for resolving disputes between the institution and partner across the facets of the partnership. Who ultimately has oversight of the advertisements and messaging, curriculum, policy, and process?

Anthology will provide an account team responsible for monitoring the success of the account, providing ongoing quality assurance processes, as well as providing regular communication and reports related to performance achievement. The account team roles and duties include:

- Account Manager – The Account Manager is the main point of contact related to all quality assurance management, daily communication, weekly client reports, and biweekly account meetings with Southeast Missouri State University stakeholders.
- Senior Director of Enrollment Services (SDES) – The SDES will oversee the delivery of Enrollment Services and will be your first point of escalation. The SDES will help monitor performance and provide strategic guidance on best practices for implementation.
- Senior Director of Lifecycle Services (SLDS) – The SDLS is responsible for the success of the Enrollment Management services agreement, including monitoring performance metrics and achievement of performance promises. The SDLS participates in quarterly or term-based performance reviews with Southeast Missouri State University stakeholders.
- Account Executive – The account executive is responsible for the overall partnership between Southeast Missouri State University and Anthology, inclusive of all technologies and services contracted by Southeast Missouri State University. The account executive participates in annual reviews of each contract and may participate in quarterly or term-based performance reviews, as needed.
- Executive Sponsor – A member of Anthology’s senior leadership team will be assigned to provide top-level oversight to the success of the overall partnership with Southeast Missouri State University. The executive sponsor serves as an ultimate escalation point in the case of issues related to contract performance or customer satisfaction. The executive sponsor may participate in annual partnership review meetings, as needed.

The escalation path and process depend on the type of concern. If an issue arises during a coach-caller interaction that requires escalation, the coach is to take it to the account manager. The account manager brings the issue to the attention of relevant Southeast Missouri State University stakeholders as a part of the standard quality-assurance process, and resolution steps are determined. Typical resolution steps may include development of new knowledge base content, changes in procedures, staff development, or changes in the coaching staff when necessary. In a case in which resolution does not occur at the account manager level, the issue will be escalated to Anthology’s senior director of enrollment services and the executive sponsor assigned to Southeast Missouri State University account to assure leadership-level oversight of Southeast Missouri State University customer satisfaction.

An issue related to account performance, such as achievement of performance promises or service-level agreements, is escalated internally to the Anthology account executive in charge of the overall relationship and contracts with Southeast Missouri State University, as well as the appointed executive sponsor responsible for Southeast Missouri State University satisfaction as a Anthology Student Services client. Appropriate resolution steps will be established at the leadership level.

Overall, Anthology is dedicated to open communication and collaboration with the Southeast Missouri State University team in order to maintain goal alignment, customer satisfaction, and accountability to performance promises.

All advertisements, messaging, curriculum, policy and processes will be owned by the institution. As these assets are deployed by Anthology, on behalf of the institution a stringent and agreed upon stakeholder approval process will be applied before any assets or strategy is taken to market.

2. PROGRAM MARKETING

a. Describe your process for conducting market research to support the development of viable online programs.

This workstream leverages primary and secondary research to prioritize programs for investment based on student and employer demand trends, with consideration of the competitive landscape. This work will provide insights into the programs best suited for growth. The market research effort will involve supply (competition) and demand (student and employer trends) to determine overall market viability, including current market size and expected growth rates. Institutional input regarding internal resources, capacity, and growth objectives will also be considered and emphasized.

Research is usually conducted in two phases, with an initial broad-based analysis of all programs in Phase 1, followed by a more program-specific deep-dive analysis in Phase 2. The initial phase culminates in the delivery of two quadrant scorecards by degree type that provides clear visual direction about programs that showcase potential for success. Based on the Phase 1 Quadrant Analysis, Anthology will recommend top priority programs for additional research from which University will select programs for Phase 2 analysis. The Phase 2 In-Dept Program Report will include detailed program dashboards that highlight program demand, student trends, real-time jobs & skills data, industry projections, award type, format, modality, competitors, and other relevant market factors.

The initial phase of program research is to analyze the market demand and projected growth of existing and potential new program growth areas. The work product includes a Quadrant Analysis which provides an easy-to-digest visualization of high-demand programs poised for growth, programs in competitive markets, and programs that may encounter enrollment challenges. This holistic view allows University to evaluate all program opportunities and identify where to prioritize and focus efforts.

- Existing Program Prioritization: Anthology will flag existing programs already offered in the current portfolio that are primed for investment and growth. Often this step validates what the institution is already experiencing and provides a mechanism for further focus, but this step can also uncover surprising revelations about why certain programs are not performing where they possibly should be.
- “White Space” Identification: Anthology will identify programs outside of those currently offered at University as new opportunities. These “white space” programs represent new areas that are poised for growth and could be a profitable investment should the University be interested in expanding its portfolio of program offerings.

The In-Depth Program Research takes a comprehensive view of each of the selected programs, providing detailed insight on relevant market data, including historic and current student demand, real-time job postings, industry and workforce projections, credit and certification trends, format preferences, and top competitors. The information can be presented at the local, MSA, state, regional, or national level, which will be determined in collaboration with the client. The information gathered is presented in a digestible format and synthesized for clear, actionable recommendations.

b. Describe any third-party market research or market analysis conducted by another organization utilized in the assessment of an online program's viability.

Anthology utilizes data available from the National Center for Educational Statistics ("NCES") within their Integrated Postsecondary Education Data System ("IPEDS"), the Bureau of Labor Statistics ("BLS"), and Occupational Employment Statistics ("OES") to incorporate historic, real-time, and projected student and workforce demand into our customized, weighted algorithm that allows us to make a multifactorial evaluation of all programs.

Anthology also partners with Emsi, an economic modeling firm, leveraging its dynamic software that brings together multiple education, alumni, workforce, and demographic data sources into a proprietary platform. Anthology uses this cutting-edge tool to identify concentrations and volumes of job openings, competitive insights for program offerings, unmet need in the education market, skills gaps in the labor market, projected workforce growth, and other program- and industry-specific supply and demand insights.

c. Describe the types of marketing efforts your firm would provide to support online program and the development of viable leads.

Anthology will develop a comprehensive and mutually agreed upon marketing and media strategy aligned to help the University meet its desired goals for enrollment growth. A critical milestone in this work stream includes the delivery of a marketing strategy and its associated media plan. Also, as needed, Anthology may complete additional market analysis covering components such as competitive insights, program reviews, and prospective student audiences to understand the market opportunities and inform the strategy and media plan.

Our approach to marketing services can be summed up as attracting the right students, with the right message, through the right medium, at the right time. Our methodology includes a product feedback loop and allows our delivery teams to constantly analyze and refine our approach. This increases our effectiveness over time. Our team uses a variety of marketing tactics to achieve successful results, including:

- Program, competitive and audience segmentation research
- Strategic messaging approach for creative development
- Prospect-focused microsites to optimize conversion rates
- Multi-channel marketing plans to support institutional goals
- Search Engine Marketing (SEM), inclusive of PPC and SEO

Data is at the core of our successful marketing approach. We utilize analytics and Key Performance Indicators (KPIs) to create an investment-planning model that will define the optimal media mix for customized marketing plans. Our team will continually refine the plan to optimize return on investment. Anthology will provide Southeast Missouri State University with weekly/monthly, and annual performance reports to provide clarity, transparency and actionable recommendations based on results.

As a service provider, our philosophy is that we are an extension of our partner institutions. As such, accountability and oversight are important elements of our partnership approach. We strive to support and facilitate rather than dictate and restrict, and we keep our partner institutions involved and informed through every stage of our projects.

Dedicated account managers, assigned to all marketing and lead generation campaigns, are responsible for coordinating overall project management. This includes coordinating cross-team collaborations, delivering

real-time reporting, and conducting regular status meetings with all relevant Southeast Missouri State University team members.

d. Explain the information collected from prospective students and for how long is the information retained.

Control and protection of institutional data is a critical component and priority for Anthology. We understand the strict information security and privacy needs of educational institutions. Our staff, processes, and policies are designed to protect and maintain the confidentiality of any personal information (also known as “personally identifiable information” or PII) that is provided to Anthology by its educational partners and their learners.

From a marketing perspective, the following data is collected on behalf of the institution:

- First and Last Name
- Email
- Phone Number
- Program of Interest

Data obtained on prospective students is handled with utmost care in protecting consumer data. Prospective student data provided to Anthology is hosted internally without access from external systems or the internet. This data is retained within our internal CRM system or record for the duration of our partnership. Once the partnership ends, since we do not share prospective student data across our institutional partners and this data is University “owned”, we will transfer all data to the University and then delete the prospective student data at the request of the University once the partnership ends.

e. Outline any processes or safeguards your firm has to prevent high-pressure or hard-sell recruitment tactics.

As a fee-for-service provider, neither our enrollment coaches nor Anthology are incentivized by enrollment and thus not prone to high pressure or hard-sell recruitment tactics. Our coaches go through a rigorous training program designed to teach consultative-selling approaches that encourage active listening and aid in the identification of program-fit and overall likelihood of success. We work collaboratively with our institution partners to train knowledgeable coaches, dedicated to the University, who can speak to the benefits of the programs supported and help prospective students understand fit, with a focus on preparedness and ultimately persistence and retention. Our robust Quality Assurance team regularly review call recordings to ensure our coaches are acting with the utmost integrity and representing our institutional partners appropriately.

f. Describe how your firm ensures your marketing efforts do not compete with the University for a portion of our own students.

Anthology will develop and continuously optimize the media mix based on available research, research we will conduct on your behalf and ongoing results. Our focus will be on digital media, including search engine optimization best practices, content marketing best practices, paid search, display, paid social (ex. Facebook), and retargeting. Other media will be evaluated as appropriate, based upon Southeast Missouri State University goals. Our marketing plan will include details on our methodology including market research and audience segmentation, creative strategy based on these findings, recommended spend, strategies and tactics by channel, recommended media flighting schedule, and estimated results/return on investment.

Anthology will work with other agencies working on behalf of Southeast Missouri State University and the university itself to establish clear guidelines and responsibilities around efforts to maximize the impact of marketing efforts on your behalf, minimizing any overlaps that could negatively impact key performance metrics.

g. Detail any partnership or agreements that your firm has where it shares or sells leads generated as part of your relationship with Southeast Missouri State University to other schools.

Anthology does not have any partnership agreements in this capacity due to our fee for service structure. All leads obtained by and for Southeast Missouri State University are owned by the university.

h. Provide at least three (3) examples of successful marketing plans for online academic programs that your firm developed.

Please see the following case studies:

Appendix 3 – Cast Study UTEP

Appendix 4 – Case Study Wichita State University

Appendix 5 – Case Study Johns Hopkins University

3. ENROLLMENT

a. Describe the process your firm follows for a student once a lead is generated through enrollment in a degree program.

Anthology's enrollment and retention management solutions provide a high touch, student-centric, and proactive approach to helping you support both prospective and matriculated students. We enable you to get prospective students into the classroom and enrolled students to finish their studies. You will see significant increases across the student lifecycle, including: conversion from lead to application, yield rates from application to enroll, and retention and completions rates.

Anthology's enrollment and retention coaching helps institutions enroll and retain students more efficiently, while empowering and serving the needs of each learner. Our coaching model goes beyond the typical approach most institutions take to admissions and retention management, combining executive coaching, technology, and data with the sole focus of helping students be more motivated and prepared. Our coaching is adaptive to the type of student (traditional, adult, and distance learners), thus making the coaching support appropriate for various life-stages. Our approach is unique in:

- (1) identifying at-risk students
- (2) addressing the holistic needs of the student including academic success, work/life balance, financial planning, and career plans
- (3) working with students to motivate and encourage them to overcome obstacles.

Enrollment Management includes the following services:

- **Personalized coaching:** A dedicated coach will manage a pipeline of candidates by helping them complete the application process and, if accepted, enrollment steps. Each candidate in your admissions pipeline is assigned a coach who serves as a single point of contact and is available to guide him or her through the admissions process. Coaches also proactively reach out to candidates to ensure that they are progressing through the admissions process and meeting deadlines.
- **Admissions process mapping:** Anthology will collaborate with Southeast Missouri State University stakeholders to identify all required admissions steps and documents for each program, and then configure CRM tools to track and monitor student progress through programmatic admissions processes. This enables coaches to effectively guide candidates through the admissions process as well as identify gaps.
- **Progress tracking and monitoring:** Enrollment coaches will proactively monitor candidate progress through the admissions process. They will provide guidance on next steps, information to help the candidate progress, and track expected dates of completion based on interactions with candidates.
- **Pipeline reporting:** Weekly reports will be provided to track candidate progress through your admissions process and develop term-based enrollment forecasts. Additionally, a customizable follow-up survey will be conducted to students who choose not to complete the enrollment process. These survey results will be aggregated and provided to Southeast Missouri State University in an effort to evaluate competition, relevant program features, reputation, and other market-related feedback.

b. Describe the process for ensuring prospective students receive accurate information on degree requirements, tuition, and fees, advising, and other student onboarding processes.

Anthology in collaboration with University Project Lead will facilitate discovery sessions with relevant University staff members to obtain an understanding of the step-by-step process that an applicant needs to take to become a new student at University. Anthology will deliver a process map that will visualize the process, including the key milestones, staff members, and decision points throughout the enrollment process. Anthology will present the process map to University staff during a weekly status call to gather feedback and gain alignment. The process map will serve as an important piece of the training process for new coaches.

From there, Anthology will develop an online knowledge database that will be used to train coaches and serve as a reference for coaches to use when working with an applicant on the phone. During the implementation process, Anthology will lead discussions regarding best practices for standardization in colleges processes and provide a set of University information required to build this knowledge database.

c. Describe your firms process for transitioning a student from your marketing and communications processes to the University's admissions and recruitment processes.

Anthology and Southeast Missouri State University will collaborate to create and execute a plan for the transfer of student or prospective student data from University to Anthology and from Anthology to University. Anthology will provide a secure FTP site for initial transfer of student and prospective student data. Data will need to match with a particular format. Anthology will provide structure requirements during implementation and will require samples to test for proper alignment prior to launch. Any information provided to Anthology will be treated confidentially that will exclusively be used in the delivery of the Services.

Anthology will collaborate with University during implementation to develop procedures and materials that will be used in the process of outreach and communications with students. The following will be delivered during the implementation:

- Communication Plan – A predefined communication plan that outlines the sequence and timing of phone calls and emails that will be sent to applicants as they enter Anthology's enrollment funnel. The objective with this communication plan is to help maximize the percentage of applicants that engage with coaching, and ultimately enroll. Prospective students will "opt-in" to all communications from Anthology via email or through appropriate language on Anthology's marketing microsite or the University's information request forms, both digital and physical. Any prospective student information provided by the University represents to Anthology that these individuals have opted in or otherwise consented to receiving email, phone call, or text communications as contemplated in the Services and have requested information pertaining to programs and admission.

All content will be developed according to the brand standards as described in writing by University, including email addresses, phone area codes, and visual branding elements of University logo and colors. University will participate in the content development process by providing pre-developed content, Anthology requested information, and required brand elements. Additionally, University will be available to review, edit, and approve all content in a timely manner during the implementation phase.

This strategy is to ensure that the prospective student feels they have been in contact with the University from the first inquiry through enrollment.

d. Describe in detail the information that your enrollment processes will share with the University and what information from the University's student information system (Banner), customer relationship management software (Element 451) or learning management software (Canvas) that is required by your firm.

Anthology requires foundational user information to provide support to end users. We rely on the University to provide enough information for us to contact a prospective student and have basic information to support the interaction and overall enrollment.

The University will provide user information via a file generated at certain intervals (daily recommended) to make sure the University system matches the system of record (institution's SIS and/or CRM). This file will be uploaded via Secure FTP to an Anthology FTP site. Anthology will pull the file and run the contents and data into our system at corresponding intervals to sync systems and ensure accuracy.

As records are created in our system, Anthology will send back the unique identifier for each record so that the University has a way to match records and, in turn, update the SIS, LMS and CRM systems.

When an application status is updated in the institutions SIS and/or CRM, the University should send an updated record with the new application status. This will be accomplished by the daily refreshing of data through the SFTP.

For a complete list of recommended data fields often used in our partnerships, please refer to our Anthology Data Transfer Protocol in **Appendix 6**.

4. STUDENT SUPPORT

a. Describe your approach towards student engagement and retention, including details on processes used to assist in student retention.

Anthology approaches student persistence, success and retention through a combination of technology and just-in-time outreach and support driven by data. We work collaboratively with our institutional partners to identify the areas where our team or technologies can improve the overall engagement and retention of students. While our full suite of support services and solutions can be deployed to improve institutional operations and the overall engagement and retention of students. We find that, most impactful, are providing 24/7/365 support for students and using data proactively to identify at-risk students and intervene before they run into problems that prevent persistence. Anthology supports institutions in both ways through the following services:

- Virtual Student Engagement – 24/7/365 Virtual Student Support for students at every stage of their enrollment process. Whether Admissions, Records, Registration, Financial Aid, Student Accounts, Bursar, or Help Desk related, Anthology One Stop and Help Desk support provides a single point of contact for students to contact via email, phone, chat or text at any time of day, any day of the week. Our Anthology agents work on behalf of the institution and the offices supported to ensure timely resolution to student issues.
- Predictive technologies that identify at-risk students based on activity within the SIS, LMS and/or CRM to provide institutional coaches, or Anthology coaches, actionable insights into which students need support and when. By utilizing data to identify these at-risk students, we have found a direct impact on student persistence and retention.

b. List the retention and graduation rates for online programs at other universities similar to Southeast Missouri State University that you partner with.

Retention and Graduation rates for our online program partnerships at other Universities are confidential; however, we provide several resources that directly impact overall persistence, retention and graduation rates for our partner institutions. These include our One Stop Support services, providing 24/7/365 support for students and Retention coaching designed to ensure timely outreach and support for at-risk students.

The following case studies with Wayland Baptist University and Walden University provides additional information on ways in which we partner with institutions to positively impact retention and graduation. Wayland Baptist University uses our Learn LMS; however, we have supported institutions using other LMS systems such as Canvas and D2L to provide support as well.

Appendix 7 – Case Study Wayland Baptist University

Appendix 8 – Case Study Walden University

c. Describe the process for providing students with 24/7 technical assistance. What scope of assistance is provided?

Technical assistance can be provided 24/7/365 via phone, chat or web ticket/email support. Tier 1 scope of support is inclusive of a variety of support of the Learning Management System, Software, Hardware, Printing, SIS/ERP/SSB, Network (Wired, VPNs, Network Drives), Telecom, and Web Applications.

d. Describe your firm's approach to guiding students through financial aid processes.

Assistance can be offered 24/7/365 using our Student Services Inbound support via phone, chat or web/ticket submission. Using our proprietary system, SmartView, we integrate with your SIS to see a holistic, read-only view of the student's financial aid status, including ISIR and award activity. We work with you to create knowledgebase articles for external support via the web as well as for our agents to use in providing step-by-step instructions to students over the phone or through live chat and email response. Support can be provided by walking them through the submission process, providing information such as a FAFSA school code, or explaining any necessary items needed to complete the checklist or verification processes. As mentioned above, using integration, we are also able to provide information to students regarding their financial aid awards and requirements as needed.

e. Describe any career or placement assistance for students provided by your firm in the jointly developed online programs.

Anthology does not currently offer career or placement services for students.

f. Describe any internship assistance for students provided by your firm in the jointly developed online programs.

Anthology does not currently offer internship assistance for students.

5. FACULTY AND ACADEMIC SUPPORT

a. Describe the assistance provided to faculty in the development of a course, including instructional design, compliance with accessibility requirements, incorporation of best practices, and assessment of learning outcomes.

Anthology's Course Development Services (CDS) team provides instructional design expertise and works side-by-side with faculty in the creation of courses. Faculty usually have material (documents, presentations, assignments, etc.) that the CDS team can use as a starting point.

The team is well versed in accessibility requirements and partners with Anthology's Accessibility Services team to ensure all courses are designed and developed with accessibility in mind.

The course development process begins with the review or creation of learning outcomes for a course or module. Anthology's instructional design practitioners provide guidance and feedback on measurable learning outcomes to ensure careful definitions and to maximize alignment with assessments.

Best practices are shared during each cycle of discovery, design, and review. Each course presents unique requirements in terms of student engagement, faculty approach, and subject matter. The Anthology instructional designers consider these personalized requirements when offering best practice recommendations.

Course Development Services are offered for a fee on a per course basis.

b. Describe how intellectual property rights of the University and its faculty are affected, if at all, in courses where the content development is supported by your firms' staff.

The University maintains all intellectual property rights for any content developed by or with Anthology.

c. Describe how the University's current learning management software (Canvas) can be utilized in courses developed as part of this partnership.

An LMS, such as Canvas, is an organized structure for many different types of content including presentations, assignments, and documents. Courses developed for this partnership can utilize these content items to rebuild and redesign a course.

d. Describe the process for providing faculty with 24/7 technical assistance. What scope of assistance is provided?

Similar to student support, service is provided 24/7/365 via phone, chat or web ticket/email support. Tier 1 scope of support is inclusive of a variety of support of the Learning Management System, Software, Hardware, Printing, SIS/ERP/SSB, Network (Wired, VPNs, Network Drives), Telecom, and Web Applications.

e. Describe the process utilized for the selection of instructional materials for a course. Detail any existing exclusive agreements concerning course material providers that would impact this partnership.

As described in "a" above, the Anthology CDS team works side-by-side with instructors to review and select existing content to include in a newly designed course. The selection depends on the level of desired student engagement, the approach of the faculty member, and the subject-matter.

Anthology does not have any existing exclusive agreements with course material providers that would impact this partnership.

f. Describe the training and professional development opportunities provided to faculty to assist in course design and online delivery best practices.

Anthology's Digital Teaching and Learning Series delivers world-class professional development and certification for teachers and associated support staff in the use of digital learning technologies. It enables institutions to support the delivery of the highest standards of teaching and learning. The series of three certified professional development courses aids academic staff in meeting the demanding digital literacy expectations of 21st Century students.

The series is comprised of three courses:

- Fundamentals of Digital Teaching & Learning
- Designing for Digital Teaching & Learning
- Excellence in Digital Teaching & Learning

g. Describe any assistance or processes your firm has for online proctoring.

We do not currently offer assistance or process for online proctoring and it would be the responsibility of the University.

h. Describe course ownership of courses developed in consultations with the partner, and if that curriculum can be used or reused by either party.

The University has complete ownership of courses and curriculum developed by or with Anthology.

i. Describe how you will support academic departments/units/programs in the hiring of faculty and instructors where program growth is significant and requires additional staffing, if necessary.

We do not currently provide this service and it would be the responsibility of the University.

j. Describe how you have incorporated and promoted credit for prior learning in the online program.

This would be left up to the institution and does apply with our fee for service model.

k. Describe the use of various technology platforms (i.e., short courses, video/audio components) your firm uses as part of an academic course/degree program.

The completed course can include multimedia components (HTML5 compliant and SCORM if required) of the client's choice.

These could include: Interactive video, 3D video, Branching scenario, 2D animation, 3D animation, Virtual reality, Infographic, Illustration and Interactive multimedia and assessment. Custom multimedia components are priced separately.

6. FINANCIAL

a. Describe the proposed financial model required to support a partnership, including any capital investment, length of contract, minimum number of academic programs or student enrollment needed to support a partnership.

Our contract terms are flexible and usually range from 15 – 24 months with option to renew. We do not require a minimum number of academic programs or enrollment as our contracts are fee for service. Success measures will be defined with the institution to ensure Anthology is delivering on our goals and objectives.

b. Describe proposed revenue sharing agreement of a comprehensive partnership.

Anthology does not currently provide revenue-sharing agreements with our clients. Please see below for rates in our fee-for-service model. The scope can be further defined as programs are prioritized based on the services required.

c. Describe proposed costs for non-revenue share models, where the University utilizes specific services (i.e., market research, course design, marketing) of your firm, if offered.

With Anthology OPX, the institution only pays for the services necessary using our fee-for-service model. Solutions are tailored to your specific needs, unlike traditional OPMs that require you to buy into a full package regardless of your goals and objectives.

You will own your creative assets, course content, and prospective student leads— which means you also control your incoming revenue.

d. Outline all assumed University expenses, both up front and annual, that would be part of this partnership.

All expenses would be University expenses based on our fee-for-service model. Roles and responsibilities will be clearly outlined as we further define scope and support.

e. Describe any process for determining the expenses related to the research, design, marketing, and launch of an online program.

Please see **Appendix 9** for our Rate Card.

f. Describe any additional services offered, and all related costs, which would not be covered as part of this agreement as detailed by item 6. - Cost in the Offeror's Information section on Page 12 of this Request for Proposal.

Please refer to rate card for full list of services and fees.

g. Describe any tuition discounting strategies used by your firm to encourage enrollment. Are there any private sector, government sector, or other workforce development programs that depend on discounting of tuition to drive enrollment?

Unless the institution would like to provide scholarships or waive fees, Anthology does not deploy discounting strategies on a regular basis.

REQUIRED FORMS

Attachment 1 – References

University of the District of Columbia

Nailah Williams
Interim AVP Enrollment Services
4200 Connecticut Ave, NW
Washington, DC 20008
nawilliams@udc.edu
202-274-5941

UDC partners with Anthology in enrollment and student services.

As a strategic partner of The University of the District of Columbia (UDC), we were tasked with 3 goals of driving awareness of UDC's degrees and generate leads, increase enrollment for marketed programs and organic applicants, relative to the historic average enrollment conversion and optimize marketing and messaging to target the right audiences with a coordinated approach. As a continued result, our team learned the market and saw strong brand awareness quickly, we saw good lead movement and much quicker than average application conversion and our enrollment team saw consistent trends in applicant needs and saw improved conversion rates post pandemic.

Wichita State University

Anna Porcaro, Ph.D.,
Executive Director of Online and Adult Learning
Morrison Hall 1845 N. Fairmont Box 12
Wichita, KS 67260-0001
anna.porcaro@wichita.edu
316-978-7787

Provided by client:

Wichita State University partners with Blackboard in marketing, recruitment, enrollment, and student services. We utilize their student contact centers to handle many of our incoming calls from students. Here at WSU, we have aggressive growth goals. Online education and non-traditional students are a big part of the plan to meet those goals. Blackboard has provided services that align our resources to serving those types of students, while also providing superior customer service to our traditional student population. Beginning September 2016, we partnered with Blackboard's marketing and media management services to assist us in driving enrollments into our online programs. They built a media plan based on market research and audience segmentation. This plan is augmented by other marketing activities that they conducted including an audit of our website and communications plan, search engine optimization, and landing page development.

We have seen clear and consistent results through their work over since we first engaged their services. They provide transparent and timely information about where the campaigns are performing best and where we need to focus more attention or consider different ways of approaching a flagging campaign. Their team also affords us concierge-level service by answering our calls and emails quickly and listening to our needs and

wants, while providing experienced and proven advice in marketing and recruiting non-traditional students. They are flexible with our requests for changes and treat us as a priority. We are pleased with the level of service and execution that the Blackboard team provides us. I highly recommend their services - especially if you are looking for a partner who cares about enrollment, transparency, and results.

Rutgers University

65 Davidson Road, RM 302

Piscataway, NJ 08854-5602

William Pagan, Acting Associate Vice President for Online Programs

848-445-5067

william.pagan@rutgers.edu

We provide comprehensive Marketing and Enrollment Coaching for Rutgers Online. Blackboard was brought on by Rutgers to drive awareness of RU's managed online programs, build a pipeline of leads, and help stabilize enrollments for the Rutgers Online programs. The Rutgers Online campaign has consistently generated a solid volume of leads and we're also seeing strong down-funnel movement. Our enrollment team has also provided inbound retention services by fielding inquiries from current students.

Rice University

6100 Main Street

Houston, TX 77005

Michelle Paetow/Marketing & Project Analyst

713-348-0000

mpaetow@rice.edu

Rice University, Glasscock School of Continuing Studies: Rice University is a private comprehensive R1 university in Houston, TX. Glasscock SCS is charged with driving further access to a Rice educational experience via non-credit programming. Blackboard was brought in as a performance marketing partner to drive registrations for Glasscock's portfolio of online and on-ground non-credit offerings, including courses and certificates. We have helped drive registration and revenue growth year over year while also achieving positive ROI of almost 2x.

University of Texas at El Paso

500 W University Avenue

El Paso, TX 79902

Beth Brunk-Chavez, Ph.D.

Dean of Extended University

blbrunk@utep.edu

915-747-6318

Description: A large, public research university in Texas and a Blackboard customer for over a decade, the university selected to work with Blackboard's Content Development Services in June of 2020 to fully design and develop 32 courses for Fall within a seven-week time span from inception to completed deliverable to meet the shift of providing these as fully online courses from face to face. The project was successfully completed in time for the first day of classes as well as faculty's option to continue to development.

**SOUTHEAST MISSOURI STATE UNIVERSITY
ONLINE PROGRAM MANAGEMENT
REQUEST FOR PROPOSAL 5989**

**ATTACHMENT 1
OFFEROR'S EXPERIENCE**

The offeror should provide three (3) references as requested on page 12, item 8.3 of RFP 5989.

Organization Name University of the District of Columbia

Contact Person Nailah Williams, Interim AVP Enrollment Services

E-mail Address nawilliams@udc.edu

Address 4200 Connecticut Ave, NW, Washington, DC 20008

Telephone No . (202) 274-5941

Brief Description Please see proposal for details

Organization Name Wichita State University

Contact Person Anna Porcaro, Ph.D., Executive Director of Online and Adult Learning

E-mail Address anna.porcaro@wichita.edu

Address Morrison Hall 1845 N. Fairmont Box 12, Wichita, KS 67260-0001

Telephone No . 316-978-7787

Brief Description Please see proposal for details

Organization Name Rutgers University

Contact Person William Pagan, Acting Associate Vice President for Online Programs

E-mail Address william.pagan@rutgers.edu

Address 65 Davidson Road, RM 302, Piscataway, NJ 08854-5602

Telephone No . 848-445-5067

Brief Description Please see proposal for details

Attachment 2 – Vendor Business Information

ATTACHMENT 2 VENDOR INFORMATION

It is the intent of Southeast Missouri State University to seek and solicit vendor participation from certified minority, women, Missouri service-disabled veteran owned businesses, and blind/sheltered workshops. Please complete the applicable sections of this form and return with your bid or proposal response. Completion of the following information does not affect purchase order/contract award.

SECTION I

BUSINESS TYPE

- | | |
|---|--|
| <input type="checkbox"/> A. Small, Minority, Missouri | <input type="checkbox"/> F. Large, Non-Minority, Missouri |
| <input type="checkbox"/> B. Small, Non-Minority, Missouri | <input type="checkbox"/> G. Large, Minority, Non-Missouri |
| <input type="checkbox"/> C. Small, Minority, Non-Missouri | <input checked="" type="checkbox"/> H. Large, Non-Minority, Non-Missouri |
| <input type="checkbox"/> D. Small, Non-Minority, Non-Missouri | <input type="checkbox"/> I. Female-Owned Business |
| <input type="checkbox"/> E. Large, Minority Missouri | <input type="checkbox"/> J. Unable to Classify |

DEFINITIONS:

Small: An organization with less than 500 employees.

Large: An organization with greater than 500 employees.

Minority: An organization that has been (1) certified socially and economically disadvantaged by the Small Business Administration, (2) certified as a minority business enterprise by a state or federal agency, or (3) is an independent business concern that is 51% owned and controlled by a minority group member including:

- Black American
- Hispanic American with origins from Puerto Rico, Mexico, Cuba, South or Central America
- Native Indian, Eskimo, or Native Hawaiian
- Asian Pacific American with origins from Japan, China, the Philippines, Vietnam, Korea, Samoa, Guam, the U.S. Trust Territories of the Pacific, northern Marianas, Laos, Cambodia, Taiwan, or the Indian Subcontinent

Non-Minority: An organization that does not satisfy the criteria listed above for Minority.

Missouri: An organization whose state of incorporation is in Missouri, or if not incorporated whose principal place of business is in Missouri.

Non-Missouri: An organization whose state of incorporation is not in Missouri, or if not incorporated whose principal place of business is located outside Missouri.

For example: An organization having 50 employees, owned by a Black American, and whose general mailing address is Tampa, Florida would be classified as:

- Small, Minority, Non-Missouri

SECTION II

SERVICE-DISABLED VETERAN STATUS

Service-Disabled Veteran (SDV): Any individual who is disabled as certified by the appropriate federal agency responsible for the administration of veterans' affairs.

Service-Disabled Veteran Business Enterprise (SDVE): a business concern

- not less than fifty-one (51) percent of which is owned by one or more service-disabled veterans OR, in the case of any publicly owned business, not less than fifty-one (51) percent of the stock of which is owned by one or more service-disabled veterans; AND
- the management and daily business operations of which are controlled by one or more service-disabled veterans.

If a bidder meets the standards of a qualified SDVE as defined in 34.074 RSMo and is either doing business as a Missouri firm, corporation, or individual; or maintains a Missouri office or place of business, please provide the following:

- a copy of an award letter from the Department of Veterans Affairs (VA), or a copy of the bidder's discharge paper (DD Form 214, Certificate of Release or Discharge from Active Duty); AND
- a completed copy of this section

By signing below, I certify that I meet the standards of a SDVE as defined in section 34.074, RSMo, and that I am either doing business as a Missouri firm, corporation, or individual; or maintain Missouri offices or places of business at the location(s) listed below.

N/A

Service-Disabled Veteran's Name
(Please Print)

Service-Disabled Veteran Business Name

Service-Disabled Veteran's Signature

MO Address of Service-Disabled
Veteran Business

SECTION III

BLIND OR SHELTERED WORKSHOP

Indicate appropriate business classification (s):

_____ Organization _____ Sheltered
for the Blind Workshop

Organization Name: N/A

Organization Address: _____

Organization Contact Name: _____

Email Address: _____

Phone Number: _____

Certification Number: _____
(or attach a copy of certificate)

Certification Expiration Date: _____

Authorization Signature of Participating Organization
(Organization of the Blind or Sheltered Workshop)

Date

Attachment 3 – Affidavit of Work Authorization

**ATTACHMENT 3
BUSINESS ENTITY CERTIFICATION, ENROLLMENT DOCUMENTATION,
AND AFFIDAVIT OF WORK AUTHORIZATION**

BUSINESS ENTITY CERTIFICATION:

The bidder must certify their current business status by completing either Box A or Box B on this Attachment.

BOX A: To be completed by a non-business entity as defined below.

BOX B: To be completed by a business entity who has not yet completed and submitted documentation pertaining to the federal work authorization program as described at <https://www.e-verify.gov/>.

Business entity, as defined in section 285.525, RSMo pertaining to section 285.530, RSMo is any person or group of persons performing or engaging in any activity, enterprise, profession, or occupation for gain, benefit, advantage, or livelihood. The term “**business entity**” shall include but not be limited to self-employed individuals, partnerships, corporations, contractors, and subcontractors. The term “**business entity**” shall include any business entity that possesses a business permit, license, or tax certificate issued by the state, any business entity that is exempt by law from obtaining such a business permit, and any business entity that is operating unlawfully without such a business permit. The term “**business entity**” shall not include a self-employed individual with no employees or entities utilizing the services of direct sellers as defined in subdivision (17) of subsection 12 of section 288.034, RSMo.

Note: Regarding governmental entities, business entity includes Missouri schools, Missouri universities, out of state agencies, out of state schools, out of state universities, and political subdivisions. A business entity does not include Missouri state agencies and federal government entities.

BOX A – CURRENTLY NOT A BUSINESS ENTITY

I certify that _____ (Company/Individual Name) **DOES NOT CURRENTLY MEET** the definition of a business entity, as defined in section 285.525, RSMo pertaining to section 285.530, RSMo as stated above, because: (check the applicable business status that applies below)

- I am a self-employed individual with no employees; **OR**
- The company that I represent utilizes the services of direct sellers as defined in subdivision (17) of subsection 12 of section 288.034, RSMo.

I certify that I am not an alien unlawfully present in the United States and if Blackboard Inc. (Company/Individual Name) is awarded a contract for the services requested herein under RFP 5989 (IFB/RFP/RFQ number) and if the business status changes during the life of the contract to become a business entity as defined in section 285.525, RSMo pertaining to section 285.530, RSMo then, prior to the performance of any services as a business entity, Blackboard Inc. (Company/Individual Name) agrees to complete Box B, comply with the requirements stated in Box B and provide Southeast Missouri State University with all documentation required in Box B of this attachment.

**Authorized Representative's
Name (Please Print)**

Authorized Representative's Signature

Company Name (if applicable)

Date

ATTACHMENT 3 continued

BOX B – CURRENT BUSINESS ENTITY STATUS

I certify that Blackboard Inc. (Business Entity Name) **MEETS** the definition of a business entity as defined in section 285.525, RSMo pertaining to section 285.530.

Michael Pohorylo
Authorized Business Entity Representative's Name (Please Print)


Authorized Business Entity Representative's Signature

Blackboard Inc.
Business Entity Name

August 17, 2022
Date

generalcounsel@blackboard.com
E-Mail Address

As a business entity, the bidder/offeror/contractor must perform/provide each of the following. The bidder/offeror/contractor should check each to verify completion/submission of all of the following:

- Enroll and participate in the E-Verify federal work authorization program (Website: <https://www.e-verify.gov/>; Phone: 888-464-4218; Email: e-verify@dhs.gov) with respect to the employees hired after enrollment in the program who are proposed to work in connection with the services required herein; AND
- Provide documentation affirming said company's/individual's enrollment and participation in the E-Verify federal work authorization program. Documentation shall include a page from the E-Verify Memorandum of Understanding (MOU) listing the bidder's/offeror's name and the MOU signature page completed and signed, at minimum, by the bidder/offeror and the Department of Homeland Security – Verification Division. If the signature page of the MOU lists the bidder's/offeror's name and company ID, then no additional pages of the MOU must be submitted.; AND
- Submit a completed, notarized Affidavit of Work Authorization provided on the next page of this Attachment.

THE E-VERIFY
MEMORANDUM OF UNDERSTANDING
FOR EMPLOYERS USING AN E-VERIFY EMPLOYER AGENT

ARTICLE I
PURPOSE AND AUTHORITY

The parties to this agreement are the Department of Homeland Security (DHS), the Blackboard Inc. (Employer), and the E-Verify Employer Agent. The purpose of this agreement is to set forth terms and conditions which the Employer and the E-Verify Employer Agent will follow while participating in E-Verify.

E-Verify is a program that electronically confirms an employee's eligibility to work in the United States after completion of Form I-9, Employment Eligibility Verification (Form I-9). This Memorandum of Understanding (MOU) explains certain features of the E-Verify program and describes specific responsibilities of the Employer, the E-Verify Employer Agent, the Social Security Administration (SSA), and DHS.

Authority for the E-Verify program is found in Title IV, Subtitle A, of the Illegal Immigration Reform and Immigrant Responsibility Act of 1996 (IIRIRA), Pub. L. 104-208, 110 Stat. 3009, as amended (8 U.S.C. Section 1324a note). The Federal Acquisition Regulation (FAR) Subpart 22.18, "Employment Eligibility Verification" and Executive Order 12989, as amended, provide authority for Federal contractors and subcontractors (Federal contractor) to use E-Verify to verify the employment eligibility of certain employees working on Federal contracts.

ARTICLE II
RESPONSIBILITIES

A. RESPONSIBILITIES OF THE EMPLOYER

1. The Employer agrees to display the following notices supplied by DHS in a prominent place that is clearly visible to prospective employees and all employees who are to be verified through the system:
 - A. Notice of E-Verify Participation
 - B. Notice of Right to Work
2. The Employer agrees to provide to the SSA and DHS the names, titles, addresses, and telephone numbers of the Employer representatives to be contacted about E-Verify. The Employer also agrees to keep such information current by providing updated information to SSA and DHS whenever the representatives' contact information changes.
3. The Employer shall become familiar with and comply with the most recent version of the E-Verify User Manual. The Employer will obtain the E-Verify User Manual from the E-Verify Employer Agent.
4. The Employer agrees to comply with current Form I-9 procedures, with two exceptions:
 - A. If an employee presents a "List B" identity document, the Employer agrees to only accept "List B" documents that contain a photo. (List B documents identified in 8 C.F.R. 274a.2(b)(1)(B)) can be presented during the Form I-9 process to establish identity.) If an employee objects to the photo requirement for religious reasons, the Employer should contact E-Verify at 1-888-464-4218.
 - B. If an employee presents a DHS Form I-551 (Permanent Resident Card), Form I-766 (Employment Authorization Document), or U.S. Passport or Passport Card to complete I-Form I-9, the Employer agrees to make a photocopy of the document and to retain the photocopy with the employee's Form I-9. The Employer will use the photocopy to verify the photo and to assist DHS with its review of photo mismatches that employees contest. DHS may in the future designate other documents that activate the photo screening tool.

Note: Subject only to the exceptions noted previously in this paragraph, employees still retain the right to present any List A, or List B and List C, document(s) to complete the Form I-9.

5. The Employer agrees to record the case verification number on the employee's Form I-9 or to print the screen containing the case verification number and attach it to the employee's Form I-9.

6. The Employer agrees that, although it participates in E-Verify, the Employer has a responsibility to complete, retain, and make available for inspection Forms I-9 that relate to its employees, or from other requirements of applicable regulations or laws, including the obligation to comply with the antidiscrimination requirements of section 274B of the INA with respect to Form I-9 procedures.
 - A. The following modified requirements are the only exceptions to an Employer's obligation to not employ unauthorized workers and comply with the anti-discrimination provision of the INA: (1) List B identity documents must have photos, as described in paragraph 5 above; (2) When an Employer confirms the identity and employment eligibility of newly hired employee using E-Verify procedures, the Employer establishes a rebuttable presumption that it has not violated section 274A(a)(1)(A) of the Immigration and Nationality Act (INA) with respect to the hiring of that employee; (3) If the Employer receives a final nonconfirmation for an employee, but continues to employ that person, the Employer must notify DHS and the Employer is subject to a civil money penalty between \$550 and \$1,100 for each failure to notify DHS of continued employment following a final nonconfirmation; (4) If the Employer continues to employ an employee after receiving a final nonconfirmation, then the Employer is subject to a rebuttable presumption that it has knowingly employed an unauthorized alien in violation of section 274A(a)(1)(A); and (5) no E-Verify participant is civilly or criminally liable under any law for any action taken in good faith based on information provided through the E-Verify.
 - B. DHS reserves the right to conduct Form I-9 compliance inspections, as well as any other enforcement or compliance activity authorized by law, including site visits, to ensure proper use of E-Verify.
7. The Employer is strictly prohibited from creating an E-Verify case before the employee has been hired, meaning that a firm offer of employment was extended and accepted and Form I-9 was completed. The Employer agrees to create an E-Verify case for new employees within three Employer business days after each employee has been hired (after both Sections 1 and 2 of Form I-9 have been completed), and to complete as many steps of the E-Verify process as are necessary according to the E-Verify User Manual. If E-Verify is temporarily unavailable, the three-day time period will be extended until it is again operational in order to accommodate the Employer's attempting, in good faith, to make inquiries during the period of unavailability.
8. The Employer agrees not to use E-Verify for pre-employment screening of job applicants, in support of any unlawful employment practice, or for any other use that this MOU or the E-Verify User Manual does not authorize.
9. The Employer must use E-Verify (through its E-Verify Employer Agent) for all new employees. The Employer will not verify selectively and will not verify employees hired before the effective date of this MOU. Employers who are Federal contractors may qualify for exceptions to this requirement as described in Article II.B of this MOU.
10. The Employer agrees to follow appropriate procedures (see Article III below) regarding tentative nonconfirmations. The Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer agrees to provide written referral instructions to employees and instruct affected employees to bring the English copy of the letter to the SSA. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending. Further, when employees contest a tentative nonconfirmation based upon a photo mismatch, the Employer must take additional steps (see Article III.B below) to contact DHS with information necessary to resolve the challenge.
11. The Employer agrees not to take any adverse action against an employee based upon the employee's perceived employment eligibility status while SSA or DHS is processing the verification request unless the Employer obtains knowledge (as defined in 8 C.F.R. Section 274a.1(l)) that the employee is not work authorized. The Employer understands that an initial inability of the SSA or DHS automated verification system to verify work authorization, a tentative nonconfirmation, a case in continuance (indicating the need for additional time for the government to resolve a case), or the finding of a photo mismatch, does not establish, and should not be interpreted as, evidence that the employee is not work authorized. In any of such cases, the employee must be provided a full and fair opportunity to contest the finding, and if he or she does so, the employee may not be terminated or suffer any adverse employment consequences based upon the employee's perceived employment eligibility status (including denying, reducing, or extending work hours, delaying or preventing training, requiring an employee to work in poorer conditions, withholding pay, refusing to assign the employee to a Federal contract or other assignment, or otherwise assuming that he or she is unauthorized to work) until and unless secondary verification by SSA or DHS has been completed and a final nonconfirmation has been issued. If the employee does not choose to contest a tentative nonconfirmation or a photo mismatch or if a secondary verification is completed and a final nonconfirmation is issued, then the Employer can find the employee is not work authorized and terminate

the employee's employment. Employers or employees with questions about a final nonconfirmation may call E-Verify at 1-888-464-4218 (customer service) or 1-888-897-7781 (worker hotline).

12. The Employer agrees to comply with Title VII of the Civil Rights Act of 1964 and section 274B of the INA as applicable by not discriminating unlawfully against any individual in hiring, firing, employment eligibility verification, or recruitment or referral practices because of his or her national origin or citizenship status, or by committing discriminatory documentary practices. The Employer understands that such illegal practices can include selective verification or use of E-Verify except as provided in part D below, or discharging or refusing to hire employees because they appear or sound "foreign" or have received tentative nonconfirmations. The Employer further understands that any violation of the immigration-related unfair employment practices provisions in section 274B of the INA could subject the Employer to civil penalties, back pay awards, and other sanctions, and violations of Title VII could subject the Employer to back pay awards, compensatory and punitive damages. Violations of either section 274B of the INA or Title VII may also lead to the termination of its participation in E-Verify. If the Employer has any questions relating to the anti-discrimination provision, it should contact OSC at 1-800-255-8155 or 1-800-237-2515 (TDD).
13. The Employer agrees that it will use the information it receives from E-Verify (through its E-Verify Employer Agent) only to confirm the employment eligibility of employees as authorized by this MOU. The Employer agrees that it will safeguard this information, and means of access to it (such as PINS and passwords), to ensure that it is not used for any other purpose and as necessary to protect its confidentiality, including ensuring that it is not disseminated to any person other than employees of the Employer who are authorized to perform the Employer's responsibilities under this MOU, except for such dissemination as may be authorized in advance by SSA or DHS for legitimate purposes.
14. The Employer agrees to notify DHS immediately in the event of a breach of personal information. Breaches are defined as loss of control or unauthorized access to E-Verify personal data. All suspected or confirmed breaches should be reported by calling 1-888-464-4218 or via email a E-Verify@dhs.gov. Please use "Privacy Incident - Password" in the subject line of your email when sending a breach report to E-Verify.
15. The Employer acknowledges that the information it receives through the E-Verify Employer Agent from SSA is governed by the Privacy Act (5 U.S.C. Section 552a(i)(1) and (3)) and the Social Security Act (42 U.S.C. 1306(a)). Any person who obtains this information under false pretenses or uses it for any purpose other than as provided for in this MOU may be subject to criminal penalties.
16. The Employer agrees to cooperate with DHS and SSA in their compliance monitoring and evaluation of E-Verify (whether directly or through their E-Verify Employer Agent), which includes permitting DHS, SSA, their contractors and other agents, upon reasonable notice, to review Forms I-9 and other employment records and to interview it and its employees regarding the Employer's use of E-Verify, and to respond in a prompt and accurate manner to DHS requests for information relating to their participation in E-Verify.
17. The Employer shall not make any false or unauthorized claims or references about its participation in E-Verify on its website, in advertising materials, or other media. The Employer shall not describe its services as federally-approved, federally-certified, or federally-recognized, or use language with a similar intent on its website or other materials provided to the public. Entering into this MOU does not mean that E-Verify endorses or authorizes your E-Verify services and any claim to that effect is false.
18. The Employer shall not state in its website or other public documents that any language used therein has been provided or approved by DHS, USCIS or the Verification Division, without first obtaining the prior written consent of DHS.
19. The Employer agrees that E-Verify trademarks and logos may be used only under license by DHS/USCIS (see M-795 ([Web](#))) and, other than pursuant to the specific terms of such license, may not be used in any manner that might imply that the Employer's services, products, websites, or publications are sponsored by, endorsed by, licensed by, or affiliated with DHS, USCIS, or E-Verify.
20. The Employer understands that if it uses E-Verify procedures for any purpose other than as authorized by this MOU, the Employer may be subject to appropriate legal action and termination of its participation in E-Verify according to this MOU.
21. The Employer agrees that it will notify its E-Verify Employer Agent immediately if it is awarded a federal contract with the FAR clause. Your E-Verify Employer Agent needs this information so that it can update your company's E-Verify profile within 30 days of the contract award date.

B. RESPONSIBILITIES OF E-VERIFY EMPLOYER AGENT

1. The E-Verify Employer Agent agrees to provide to the SSA and DHS the names, titles, addresses, and telephone numbers of the E-Verify Employer Agent representatives who will be accessing information under E-Verify and shall update them as needed to keep them current.
2. The E-Verify Employer Agent agrees to become familiar with and comply with the E-Verify User Manual and provide a copy of the most current version of the E-Verify User Manual to the Employer so that the Employer

can become familiar with and comply with E-Verify policy and procedures. The E-Verify Employer Agent agrees to obtain a revised E-Verify User Manual as it becomes available and to provide a copy of the revised version to the Employer no later than 30 days after the manual becomes available.

3. The E-Verify Employer Agent agrees that any person accessing E-Verify on its behalf is trained on the most recent E-Verify policy and procedures.
4. The E-Verify Employer Agent agrees that any E-Verify Employer Agent Representative who will perform employment verification cases will complete the E-Verify Tutorial before that individual initiates any cases.
 - A. The E-Verify Employer Agent agrees that all E-Verify Employer Agent representatives will take the refresher tutorials initiated by the E-Verify program as a condition of continued use of E-Verify, including any tutorials for Federal contractors, if any of the Employers represented by the E-Verify Employer Agent is a Federal contractor.
 - B. Failure to complete a refresher tutorial will prevent the E-Verify Employer Agent and Employer from continued use of E-Verify.
5. The E-Verify Employer Agent agrees to grant E-Verify access only to current employees who need E-Verify access. The E-Verify Employer Agent must promptly terminate an employee's E-Verify access if the employee is separated from the company or no longer needs access to E-Verify.
6. The E-Verify Employer Agent agrees to obtain the necessary equipment to use E-Verify as required by the E-Verify rules and regulations as modified from time to time.
7. The E-Verify Employer Agent agrees to, consistent with applicable laws, regulations, and policies, commit sufficient personnel and resources to meet the requirements of this MOU.
8. The E-Verify Employer Agent agrees to provide its clients with training on E-Verify processes, policies, and procedures. The E-Verify Employer Agent also agrees to provide its clients with ongoing E-Verify training as needed. E-Verify is not responsible for providing training to clients of E-Verify Employer Agents.
9. The E-Verify Employer Agent agrees to provide the Employer with the notices described in Article II.B.1 below.
10. The E-Verify Employer Agent agrees to create E-Verify cases for the Employer it represents in accordance with the E-Verify Manual, the E-Verify Web-Based Tutorial and all other published E-Verify rules and procedures. The E-Verify Employer Agent will create E-Verify cases using information provided by the Employer and will immediately communicate the response back to the Employer. If E-Verify is temporarily unavailable, the three-day time period will be extended until it is again operational in order to accommodate the E-Verify Employer Agent's attempting, in good faith, to make inquiries on behalf of the Employer during the period of unavailability.
11. When the E-Verify Employer Agent receives notice from a client company that it has received a contract with the FAR clause, then the E-Verify Employer Agent must update the company's E-Verify profile within 30 days of the contract award date.
12. If data is transmitted between the E-Verify Employer Agent and its client, then the E-Verify Employer Agent agrees to protect personally identifiable information during transmission to and from the E-Verify Employer Agent.
13. The E-Verify Employer Agent agrees to notify DHS immediately in the event of a breach of personal information. Breaches are defined as loss of control or unauthorized access to E-Verify personal data. All suspected or confirmed breaches should be reported by calling 1-888-464-4218 or via email at E-Verify@dhs.gov. Please use "Privacy Incident - Password" in the subject line of your email when sending a breach report to E-Verify.
14. The E-Verify Employer Agent agrees to fully cooperate with DHS and SSA in their compliance monitoring and evaluation of E-Verify, including permitting DHS, SSA, their contractors and other agents, upon reasonable notice, to review Forms I-9, employment records, and all records pertaining to the E-Verify Employer Agent's use of E-Verify, and to interview it and its employees regarding the use of E-Verify, and to respond in a timely and accurate manner to DHS requests for information relating to their participation in E-Verify.
15. The E-Verify Employer Agent shall not make any false or unauthorized claims or references about its participation in E-Verify on its website, in advertising materials, or other media. The E-Verify Employer Agent shall not describe its services as federally-approved, federally-certified, or federally-recognized, or use language with a similar intent on its website or other materials provided to the public. Entering into this MOU does not mean that E-Verify endorses or authorizes your E-Verify Employer Agent services and any claim to that effect is false.
16. The E-Verify Employer Agent shall not state in its website or other public documents that any language used therein has been provided or approved by DHS, USCIS or the Verification Division, without first obtaining the

prior written consent of DHS.

17. The E-Verify Employer Agent agrees that E-Verify trademarks and logos may be used only under license by DHS/USCIS (see) and, other than pursuant to the specific terms of such license, may not be used in any manner that might imply that the E-Verify Employer Agent's services, products, websites, or publications are sponsored by, endorsed by, licensed by, or affiliated with DHS, USCIS, or E-Verify.
18. The E-Verify Employer Agent understands that if it uses E-Verify procedures for any purpose other than as authorized by this MOU, the E-Verify Employer Agent may be subject to appropriate legal action and termination of its participation in E-Verify according to this MOU.

C. RESPONSIBILITIES OF FEDERAL CONTRACTORS

The E-Verify Employer Agent shall ensure that the E-Verify Employer Agent and the Employers represented by the E-Verify Employer Agent carry out the following responsibilities if the Employer is a Federal contractor or becomes a federal contractor. The E-Verify Employer Agent should instruct the client to keep the E-Verify Employer Agent informed about any changes or updates related to federal contracts. It is the E-Verify Employer Agent's responsibility to ensure that its clients are in compliance with all E-Verify policies and procedures.

1. If the Employer is a Federal contractor with the FAR E-Verify clause subject to the employment verification terms in Subpart 22.18 of the FAR, it will become familiar with and comply with the most current version of the E-Verify User Manual for Federal Contractors as well as the E-Verify Supplemental Guide for Federal Contractors.
2. In addition to the responsibilities of every employer outlined in this MOU, the Employer understands that if it is a Federal contractor subject to the employment verification terms in Subpart 22.18 of the FAR it must verify the employment eligibility of any "employee assigned to the contract" (as defined in FAR 22.1801). Once an employee has been verified through E-Verify by the Employer, the Employer may not reverify the employee through E-Verify.
 - A. An Employer that is not enrolled in E-Verify as a Federal contractor at the time of a contract award must enroll as a Federal contractor in the E-Verify program within 30 calendar days of contract award and, within 90 days of enrollment, begin to verify employment eligibility of new hires using E-Verify. The Employer must verify those employees who are working in the United States, whether or not they are assigned to the contract. Once the Employer begins verifying new hires, such verification of new hires must be initiated within three business days after the hire date. Once enrolled in E-Verify as a Federal contractor, the Employer must begin verification of employees assigned to the contract within 90 calendar days after the date of enrollment or within 30 days of an employee's assignment to the contract, whichever date is later.
 - B. Employers enrolled in E-Verify as a Federal contractor for 90 days or more at the time of a contract award must use E-Verify to begin verification of employment eligibility for new hires of the Employer who are working in the United States, whether or not assigned to the contract, within three business days after the date of hire. If the Employer is enrolled in E-Verify as a Federal contractor for 90 calendar days or less at the time of contract award, the Employer must, within 90 days of enrollment, begin to use E-Verify to initiate verification of new hires of the contractor who are working in the United States, whether or not assigned to the contract. Such verification of new hires must be initiated within three business days after the date of hire. An Employer enrolled as a Federal contractor in E-Verify must begin verification of each employee assigned to the contract within 90 calendar days after date of contract award or within 30 days after assignment to the contract, whichever is later.
 - C. Federal contractors that are institutions of higher education (as defined at 20 U.S.C. 1001(a)), state or local governments, governments of Federally recognized Indian tribes, or sureties performing under a takeover agreement entered into with a Federal agency under a performance bond may choose to only verify new and existing employees assigned to the Federal contract. Such Federal contractors may, however, elect to verify all new hires, and/or all existing employees hired after November 6, 1986. Employers in this category must begin verification of employees assigned to the contract within 90 calendar days after the date of enrollment or within 30 days of an employee's assignment to the contract, whichever date is later.
 - D. Upon enrollment, Employers who are Federal contractors may elect to verify employment eligibility of all existing employees working in the United States who were hired after November 6, 1986, instead of verifying only those employees assigned to a covered Federal contract. After enrollment, Employers must elect to verify existing staff following DHS procedures and begin E-Verify verification of all existing employees within 180 days after the election.
 - E. The Employer may use a previously completed Form I-9 as the basis for creating an E-Verify case for an employee assigned to a contract as long as:
 - i. That Form I-9 is complete (including the SSN) and complies with Article II.A.6,

- ii. The employee's work authorization has not expired, and
 - iii. The Employer has reviewed the information reflected in the Form I-9 either in person or in communications with the employee to ensure that the employee's Section 1, Form I-9 attestation has not changed (including, but not limited to, a lawful permanent resident alien having become a naturalized U.S. citizen).
- F. The Employer shall complete a new Form I-9 consistent with Article II.A.6 or update the previous Form I-9 to provide the necessary information if:
- i. The Employer cannot determine that Form I-9 complies with Article II.A.6,
 - ii. The employee's basis for work authorization as attested in Section 1 has expired or changed, or
 - iii. The Form I-9 contains no SSN or is otherwise incomplete.

Note: If Section 1 of Form I-9 is otherwise valid and up-to-date and the form otherwise complies with Article II.C.5, but reflects documentation (such as a U.S. passport or Form I-551) that expired after completing Form I-9, the Employer shall not require the production of additional documentation, or use the photo screening tool described in Article II.A.5, subject to any additional or superseding instructions that may be provided on this subject in the E-Verify User Manual.

- G. The Employer agrees not to require a second verification using E-Verify of any assigned employee who has previously been verified as a newly hired employee under this MOU or to authorize verification of any existing employee by any Employer that is not a Federal contractor based on this Article.
3. The Employer understands that if it is a Federal contractor, its compliance with this MOU is a performance requirement under the terms of the Federal contract or subcontract, and the Employer consents to the release of information relating to compliance with its verification responsibilities under this MOU to contracting officers or other officials authorized to review the Employer's compliance with Federal contracting requirements.

D. RESPONSIBILITIES OF SSA

1. SSA agrees to allow DHS to compare data provided by the Employer (through the E-Verify Employer Agent) against SSA's database. SSA sends DHS confirmation that the data sent either matches or does not match the information in SSA's database.
2. SSA agrees to safeguard the information the Employer provides (through the E-Verify Employer Agent) through E-Verify procedures. SSA also agrees to limit access to such information, as is appropriate by law, to individuals responsible for the verification of Social Security numbers or responsible for evaluation of E-Verify or such other persons or entities who may be authorized by SSA as governed by the Privacy Act (5 U.S.C. Section 552a), the Social Security Act (42 U.S.C. 1306(a)), and SSA regulations (20 CFR Part 401).
3. SSA agrees to provide case results from its database within three Federal Government work days of the initial inquiry. E-Verify provides the information to the E-Verify Employer Agent.
4. SSA agrees to update SSA records as necessary if the employee who contests the SSA tentative nonconfirmation visits an SSA field office and provides the required evidence. If the employee visits an SSA field office within the eight Federal Government work days from the date of referral to SSA, SSA agrees to update SSA records, if appropriate, within the eight-day period unless SSA determines that more than eight days may be necessary. In such cases, SSA will provide additional instructions to the employee. If the employee does not visit SSA in the time allowed, E-Verify may provide a final nonconfirmation to the E-Verify Employer Agent.

Note: If an Employer experiences technical problems, or has a policy question, the employer should contact E-Verify at 1-888-464-4218.

E. RESPONSIBILITIES OF DHS

1. DHS agrees to provide the Employer with selected data from DHS databases to enable the Employer (through the E-Verify Employer Agent) to conduct, to the extent authorized by this MOU:
 - A. Automated verification checks on alien employees by electronic means, and
 - B. Photo verification checks (when available) on employees.
2. DHS agrees to assist the E-Verify Employer Agent with operational problems associated with its participation in E-Verify. DHS agrees to provide the E-Verify Employer Agent names, titles, addresses, and telephone numbers of DHS representatives to be contacted during the E-Verify process.
3. DHS agrees to provide to the E-Verify Employer Agent with access to E-Verify training materials as well as

an E-Verify User Manual that contain instructions on E-Verify policies, procedures, and requirements for both SSA and DHS, including restrictions on the use of E-Verify.

4. DHS agrees to train E-Verify Employer Agents on all important changes made to E-Verify through the use of mandatory refresher tutorials and updates to the E-Verify User Manual. Even without changes to E-Verify, DHS reserves the right to require E-Verify Employer Agents to take mandatory refresher tutorials.
5. DHS agrees to provide to the Employer (through the E-Verify Employer Agent) a notice, which indicates the Employer's participation in E-Verify. DHS also agrees to provide to the Employer anti-discrimination notices issued by the Office of Special Counsel for Immigration-Related Unfair Employment Practices (OSC), Civil Rights Division, U.S. Department of Justice.
6. DHS agrees to issue each of the E-Verify Employer Agent's E-Verify users a unique user identification number and password that permits them to log in to E-Verify.
7. HS agrees to safeguard the information the Employer provides (through the E-Verify Employer Agent), and to limit access to such information to individuals responsible for the verification process, for evaluation of E-Verify, or to such other persons or entities as may be authorized by applicable law. Information will be used only to verify the accuracy of Social Security numbers and employment eligibility, to enforce the INA and Federal criminal laws, and to administer Federal contracting requirements.
8. DHS agrees to provide a means of automated verification that provides (in conjunction with SSA verification procedures) confirmation or tentative nonconfirmation of employees' employment eligibility within three Federal Government work days of the initial inquiry.
9. DHS agrees to provide a means of secondary verification (including updating DHS records) for employees who contest DHS tentative nonconfirmations and photo mismatch tentative nonconfirmations. This provides final confirmation or nonconfirmation of the employees' employment eligibility within 10 Federal Government work days of the date of referral to DHS, unless DHS determines that more than 10 days may be necessary. In such cases, DHS will provide additional verification instructions.

ARTICLE III

REFERRAL OF INDIVIDUALS TO SSA AND DHS

A. REFERRAL TO SSA

1. If the Employer receives a tentative nonconfirmation issued by SSA, the Employer must print the notice as directed by E-Verify. The Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer also agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer agrees to provide written referral instructions to employees and instruct affected employees to bring the English copy of the letter to the SSA. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to contest the finding, while their case is still pending.
2. The Employer agrees to obtain the employee's response about whether he or she will contest the tentative nonconfirmation as soon as possible after the Employer receives the tentative nonconfirmation. Only the employee may determine whether he or she will contest the tentative nonconfirmation.
3. After a tentative nonconfirmation, the Employer will refer employees to SSA field offices only as directed by E-Verify. The Employer must record the case verification number, review the employee information submitted to E-Verify to identify any errors, and find out whether the employee contests the tentative nonconfirmation. The Employer will transmit the Social Security number, or any other corrected employee information that SSA requests, to SSA for verification again if this review indicates a need to do so.
4. The Employer will instruct the employee to visit an SSA office within eight Federal Government work days. SSA will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary.
5. While waiting for case results, the Employer agrees to check the E-Verify system regularly for case updates.
6. The Employer agrees not to ask the employee to obtain a printout from the Social Security Administration number database (the Numident) or other written verification of the SSN from the SSA.

B. REFERRAL TO DHS

1. If the Employer receives a tentative nonconfirmation issued by DHS, the Employer must promptly notify employees in private of the finding and provide them with the notice and letter containing information specific to the employee's E-Verify case. The Employer also agrees to provide both the English and the translated notice and letter for employees with limited English proficiency to employees. The Employer must allow employees to contest the finding, and not take adverse action against employees if they choose to

- contest the finding, while their case is still pending.
2. The Employer agrees to obtain the employee's response about whether he or she will contest the tentative nonconfirmation as soon as possible after the Employer receives the tentative nonconfirmation. Only the employee may determine whether he or she will contest the tentative nonconfirmation.
 3. The Employer agrees to refer individuals to DHS only when the employee chooses to contest a tentative nonconfirmation.
 4. If the employee contests a tentative nonconfirmation issued by DHS, the Employer will instruct the employee to contact DHS through its toll-free hotline (as found on the referral letter) within eight Federal Government work days.
 5. If the Employer finds a photo mismatch, the Employer must provide the photo mismatch tentative nonconfirmation notice and follow the instructions outlined in paragraph 1 of this section for tentative nonconfirmations, generally.
 6. The Employer agrees that if an employee contests a tentative nonconfirmation based upon a photo mismatch, the Employer will send a copy of the employee's Form I-551, Form I-766, U.S. Passport, or passport card to DHS for review by:
 - A. Scanning and uploading the document, or
 - B. Sending a photocopy of the document by express mail (furnished and paid for by the employer).
 7. The Employer understands that if it cannot determine whether there is a photo match/mismatch, the Employer must forward the employee's documentation to DHS as described in the preceding paragraph. The Employer agrees to resolve the case as specified by the DHS representative who will determine the photo match or mismatch.
 8. DHS will electronically transmit the result of the referral to the Employer within 10 Federal Government work days of the referral unless it determines that more than 10 days is necessary.
 9. While waiting for case results, the Employer agrees to check the E-Verify system regularly for case updates.

ARTICLE IV

SERVICE PROVISIONS

A. NO SERVICE FEES

1. SSA and DHS will not charge the Employer for verification services performed under this MOU. The Employer is responsible for providing equipment needed to make inquiries. To access E-Verify, an Employer will need a personal computer with Internet access.

ARTICLE V

MODIFICATION AND TERMINATION

A. MODIFICATION

1. This MOU is effective upon the signature of all parties and shall continue in effect for as long as the SSA and DHS operates the E-Verify program unless modified in writing by the mutual consent of all parties.
2. Any and all E-Verify system enhancements by DHS or SSA, including but not limited to E-Verify checking against additional data sources and instituting new verification policies or procedures, will be covered under this MOU and will not cause the need for a supplemental MOU that outlines these changes.

B. TERMINATION

1. The Employer may terminate this MOU and its participation in E-Verify at any time upon 30 days prior written notice to the other parties. In addition, any Employer represented by the E-Verify Employer Agent may voluntarily terminate this MOU upon giving DHS 30 days' written notice.
2. Notwithstanding Article V, part A of this MOU, DHS may terminate this MOU, and thereby the Employer's participation in E-Verify, with or without notice at any time if deemed necessary because of the requirements of law or policy, or upon a determination by SSA or DHS that there has been a breach of system integrity or security by the Employer, or a failure on the part of the Employer to comply with established E-Verify procedures and/or legal requirements. The Employer understands that if it is a Federal contractor, termination of this MOU by any party for any reason may negatively affect the performance of its contractual responsibilities. Similarly, the Employer understands that if it is in a state where E-Verify is mandatory, termination of this by any party MOU may negatively affect the Employer's business.
3. An Employer that is a Federal contractor may terminate this MOU when the Federal contract that requires its

participation in E-Verify is terminated or completed. In such cases, the Federal contractor must provide written notice to DHS. If an Employer that is a Federal contractor fails to provide such notice, then that Employer will remain an E-Verify participant, will remain bound by the terms of this MOU that apply to non-Federal contractor participants, and will be required to use the E-Verify procedures to verify the employment eligibility of all newly hired employees.

4. The Employer agrees that E-Verify is not liable for any losses, financial or otherwise, if the Employer is terminated from E-Verify.
5. Upon termination of the relationship between an Employer and their E-Verify Employer Agent, E-Verify cannot provide the Employer with its records. The Employer agrees to seek its records from the E-Verify Employer Agent.

ARTICLE VI

PARTIES

- A. Some or all SSA and DHS responsibilities under this MOU may be performed by contractor(s), and SSA and DHS may adjust verification responsibilities between each other as necessary. By separate agreement with DHS, SSA has agreed to perform its responsibilities as described in this MOU.
- B. Nothing in this MOU is intended, or should be construed, to create any right or benefit, substantive or procedural, enforceable at law by any third party against the United States, its agencies, officers, or employees, or against the Employer, its agents, officers, or employees.
- C. The Employer may not assign, directly or indirectly, whether by operation of law, change of control or merger, all or any part of its rights or obligations under this MOU without the prior written consent of DHS, which consent shall not be unreasonably withheld or delayed. Any attempt to sublicense, assign, or transfer any of the rights, duties, or obligations herein is void.
- D. Each party shall be solely responsible for defending any claim or action against it arising out of or related to E-Verify or this MOU, whether civil or criminal, and for any liability wherefrom, including (but not limited to) any dispute between the Employer and any other person or entity regarding the applicability of Section 403(d) of IIRIRA to any action taken or allegedly taken by the Employer.
- E. The Employer understands that its participation in E-Verify is not confidential information and may be disclosed as authorized or required by law and DHS or SSA policy, including but not limited to, Congressional oversight, E-Verify publicity and media inquiries, determinations of compliance with Federal contractual requirements, and responses to inquiries under the Freedom of Information Act (FOIA).
- F. The individuals whose signatures appear below represent that they are authorized to enter into this MOU on behalf of the Employer, the E-Verify Employer Agent, and DHS respectively. The Employer understands that any inaccurate statement, representation, data or other information provided to DHS may subject the Employer, its subcontractors, its employees, or its representatives to: (1) prosecution for false statements pursuant to 18 U.S.C. 1001 and/or; (2) immediate termination of its MOU and/or; (3) possible debarment or suspension.
- G. The foregoing constitutes the full agreement on this subject between DHS, the Employer, and the E-Verify Employer Agent. Blackboard Inc. (Employer) hereby designates and appoints Sarah Rekala (E-Verify Employer Agent), including its officers and employees, as the E-Verify Employer Agent for the purpose of carrying out (Employer) responsibilities under the MOU between the Employer, the E-Verify Employer Agent, and DHS.

Company ID Number:207561

Client Company ID Number:1385021

If you have any questions, contact E-Verify at 1-888-464-4218.

Approved by:

Employer Blackboard Inc.	
Name (Please Type or Print) Wilson Pillow	Title
Signature Electronically Signed	Date February 26, 2019
E-Verify Employer Agent EMP TRUST SOLUTIONS LLC	
Name (Please Type or Print) Sarah Rekala	Title
Signature Electronically Signed	Date February 26, 2019
Department of Homeland Security - Verification Division	
Name USCIS Verification Division	Title
Signature Electronically Signed	Date February 26, 2019

Company ID Number:207561

Client Company ID Number:1385021

Information Required for the E-Verify Program	
Information relating to your Company:	
Company Name	Blackboard Inc.
Company Facility Address	1111 19th St NW Floor 10 Washington, DC 20036
Company Alternate Address	1111 19th St NW Floor 10 Washington, DC 20036
County or Parish	District Of Columbia
Employer Identification Number	52-2081178
North American Industry Classification Systems Code	Publishing Industries (Except Internet) (511)
Parent Company	
Number of Employees	2,500 to 4,999
Number of Sites Verified for	17

Company ID Number:207561

Client Company ID Number:1385021

Are you verifying for more than 1 site? If yes, please provide the number of sites verified for in each State:

Arizona	1
Texas	2
Indiana	1
Maryland	1
South Carolina	2
Kentucky	1
Dist Of Col	2
Virginia	1
California	2
North Carolina	1
New Jersey	1
Connecticut	1
Pennsylvania	1

Company ID Number:207561

Client Company ID Number:1385021

Information relating to the Program Administrator(s) for your Company on policy questions or operational problems:

Name	Wilson Pillow
Phone Number	(202) 303-9085
Fax Number	
Email Address	wilson.pillow@blackboard.com

ATTACHMENT 3 continued

AFFIDAVIT OF WORK AUTHORIZATION:

The bidder/offeror who meets the section 285.525, RSMo definition of a business entity must complete and return the following Affidavit of Work Authorization.

Comes now Michael Pohorylo (Name of Business Entity Authorized Representative) as Deputy General Counsel (Position/Title) first being duly sworn on my oath, affirm Blackboard Inc. (Business Entity Name) is enrolled and will continue to participate in the E-Verify federal work authorization program with respect to employees hired after enrollment in the program who are proposed to work in connection with the services related to contract(s) with the University for the duration of the contract(s), if awarded in accordance with subsection 2 of section 285.530, RSMo. I also affirm that Blackboard Inc. (Business Entity Name) does not and will not knowingly employ a person who is an unauthorized alien in connection with the contracted services provided to the contract(s) for the duration of the contract(s), if awarded.

In Affirmation thereof, the facts stated above are true and correct. (The undersigned understands that false statements made in this filing are subject to the penalties provided under section 575.040, RSMo.)


Authorized Representative's Signature


Michael Pohorylo
Printed Name

Deputy General Counsel
Title

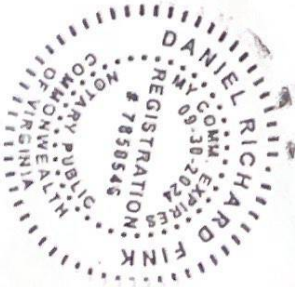
August 17, 2022
Date

generalcounsel@blackboard.com
E-Mail Address

Subscribed and sworn to before me this 17th of August, 2022. I am
(DAY) (MONTH, YEAR)
commissioned as a notary public within the County of Fairfax, State of
(NAME OF COUNTY)
Virginia, and my commission expires on 9-30-2024.
(NAME OF STATE) (DATE)


Signature of Notary

8-17-2022
Date



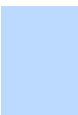
COMMENTS AND CLARIFICATIONS

Thank you for inviting Anthology to participate and bid your Proposal for Online Program Management. As the owner, developer and vendor of the Anthology products and services, we look forward to negotiating mutually agreeable terms and conditions that will serve to benefit both parties. To clarify, Anthology's Master Agreement for All Products and Services ("MSA") reflects our business model, hosted and SaaS products, professional services and pricing, all of which helps to streamline the sales and utilization process for the client. To note, after years of listening to our clients, Anthology has enhanced the MSA to better serve our clients' needs for use and security of the licensed products and professional services. Anthology, therefore, respectfully asks our clients to review our standard Master Agreement for All Products and Services enclosed with this letter, and available at <http://agreements.blackboard.com/bbinc/blackboard-new-master-agreement-all-products.aspx>. It is our intention that those agreed upon terms will serve as the final governing Master Agreement between the parties.

Thank you, The Anthology Contracts Team

ANTHOLOGY APPENDICES

Appendix 1 - Case Study Rutgers University





Rutgers Maximizes Online Enrollment and ROI in Move from OPM to Blackboard's Online Program Experience (OPX) Solutions

New Jersey's flagship public university sees strong results in switch to Blackboard's flexible alternative to the traditional online program management model

Rutgers, The State University of New Jersey, is among the oldest, highest-ranked, and most diverse public research universities in the country. Broadening access to Rutgers' high-quality academics beyond its three regional campuses, the university offers a robust portfolio of fully online degrees (marketed as Rutgers Online). Programs include degrees in nursing, business, social work, and other areas at the undergraduate and graduate levels.

Outgrowing the OPM

During the early years of Rutgers Online, the university had an agreement with a leading online program management (OPM) provider to oversee many aspects of Rutgers Online in exchange for a share of program revenue, as is custom with the OPM model. However, by the time the seven-year contract was winding down (lengthy contracts are common with OPMs), the higher education landscape had evolved. Competition was fiercer than ever, and several Rutgers Online programs were struggling with enrollment as a result.

Looking to the future, university leaders recognized that for Rutgers to retain its status as a leader in online education and to maximize return on investment, they needed more visibility into—and ultimately more control over—key elements of online program development and delivery than the traditional OPM model allows.

Among their main requirements, Rutgers was in search of a partner with a strong track record in marketing and enrollment coaching services to higher education institutions along with the proven ability to deliver customized, unbundled solutions. Given their limited funds available, they also needed that bridge solution to be cost-effective.

After considering several different options, Rutgers leaders identified Blackboard as the perfect fit to help transition off revenue-share arrangement to a more flexible, transparent, and strategic approach to managing online programs. Working together, the Rutgers and Blackboard teams planned for the next chapter of Rutgers Online, where the university would take some critical services back in house.

These functions included:

- ★ Instructional Design
- ★ Digital Services
- ★ Technology (LMS)
- ★ IT/Help Desk Support Services
- ★ State Authorization

For areas outside of the university's scope, such as market research and marketing, enrollment coaching, and retention coaching, Rutgers would rely on Blackboard's best-in-category Online Program Experience ("OPX") solutions on a fee-for-service basis. This unbundled approach would provide Rutgers with more flexibility over its online program strategy.

Research Builds Strong Foundation for Post-OPM Success

Under the OPM model, Rutgers leaders had limited visibility into how its marketing and enrollment dollars were being used and how campaigns were performing. So, though Rutgers had been marketing online programs for some time, the team lacked a clear understanding of the market landscape, historical conversion data, the types of students to target (and how best to reach them), and other important insights.

To shed more light on the market and Rutgers' place in it, Blackboard conducted a program-by-program analysis of Rutgers Online degrees and enrollment trends, tuition and start dates, marketing spend, and more. A comprehensive market landscape analysis provided a fuller understanding of student and workforce demand for online programs, the types of students most likely to be interested in Rutgers Online programs, and the competitive landscape in order to identify key differentiators to help Rutgers stand out.

Equipped with a more transparent view of the market, Rutgers can now set informed expectations for program sustainability and growth while being more strategic about its portfolio of online degrees.





Data Drives Effective Marketing and Nurture Strategy

Drawing on market research and industry best practices, the Blackboard team developed target segments, personas, leading benefits, program-specific messaging, and geo-targeting recommendations. With this foundation in place, Blackboard designed a detailed digital marketing plan focused on conversions.

Key campaign elements included:

- ★ Custom creative with messaging focused on Rutgers Online target audiences
- ★ Active bid management and media flighting with a strategic channel mix, including paid search (SEM), display, and social media advertising.
- ★ A program-specific microsite designed to optimize conversions
- ★ Measurement of down-funnel performance by program

To engage prospective students at each stage of the decision cycle—from initial interest, through application, and beyond—and help convert them into matriculated students, Blackboard developed and executed on a customized communications plan consisting of emails and phone outreach by dedicated enrollment coaches trained in Rutgers Online programs, processes, and policies.

The digital focus allows for a level of data transparency that had been lacking during the OPM years—Blackboard tracks KPIs such as lead volume and conversion rate, and optimizes ad spend in real time to help ensure marketing dollars are used as efficiently as possible.

Exceeding Expectations

In the year since the Blackboard campaign launched, Rutgers Online has not only quickly reversed the enrollment decline that institutions typically face when transitioning off an OPM relationship but has also met or exceeded projected goals for prospective students (“leads”) expressing interest, submitted applications, and enrollment.

Results to date include:

- ★ 24.8 million+ impressions
- ★ 6,000 prospective students contacted by Blackboard enrollment coaches
- ★ Conversion rates that exceeded industry benchmarks
- ★ Cost-per-lead nearly 50% lower than projected

Moreover, by moving on from a revenue-share agreement, Rutgers has realized significant cost savings and a higher yield on its investment in online programs. Based on media spend and enrollments generated since launch, the Blackboard campaign has generated a **4.8x return on investment**. Blackboard is continuously identifying opportunities to build and improve processes from campaign learnings.

Summary

Working with Blackboard and its best-in-category OPX solutions, Rutgers transitioned the development and management of its online program portfolio from a leading OPM provider (and its costly revenue-share model) to a more balanced mix of in-house capabilities and outsourced services. In the 1.5 years since the partnership launch, Rutgers has not only reversed declining enrollment and realized a 4.8x return on its investment, but has also gained full access to data and analytics at all stages, which will allow the university to continue to optimize its online efforts well into the future.

About Blackboard's Online Program Experience (OPX) Solutions

Blackboard's Online Program Experience (OPX) solutions offer a flexible and transparent alternative to the traditional OPM model. This unbundled, fee-for-service approach allows your institution to keep in house the elements of online program development and delivery where you excel and lean on the best-in-category services of an outsourced partner to provide guidance where you need it.

Blackboard OPX solutions are tech agnostic and offer support in the following areas to enable you to make ongoing strategic decisions—all with flexible financing options and short contract terms.

Unbundled Solutions for Online Program Development:

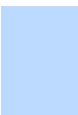
- ★ Course Development and Instructional Design
- ★ Faculty Training
- ★ Market Research and Strategic Planning
- ★ Marketing & Media
- ★ Enrollment Management

Contact us today for a consultation on how a partnership with Blackboard can help your institution optimize its online efforts and achieve maximum ROI.

**LEARN
MORE**



Appendix 2 - Case Study Texas Tech University



Blackboard

Research paves the way for enrollment growth



TEXAS TECH
UNIVERSITY.



www.ttu.edu



Lubbock, TX



15,000+ online students

Ranking 21st on Carnegie’s “Highest Activity Research” institutions for return on investment, it’s no surprise that Texas Tech University (TTU) values the role of research in its decision-making process. When the university’s overall enrollments began to stagnate, the leadership team decided to explore growth opportunities within its Worldwide eLearning program.

Ambitious goals

The university had set a goal of enrolling 5,000 new students in its eLearning program within a five-year period. What’s more, TTU wanted to increase the program’s standing within national rankings—no small feat, considering the leanness of the Worldwide eLearning team.

“Tech had been running a ‘shotgun approach’ to marketing,” explains Dr. Justin Louder, Assistant Vice Provost and Assistant Professor of Practice of Worldwide eLearning, TTU. “We knew we needed more students, but we didn’t know anything about them—what was important to them in a school, how to reach them, or even which programs to promote.” The team at TTU needed concrete insights to better focus its efforts if it was going to achieve its goals.

“It was critical that we engage an objective third party to help us,” continues Dr. Louder. “To look at our practices and the competitive landscape, and tell us what we needed to fix, without having any preconceived notions or invested interest in the findings.” After an extensive RFP process in search of the right partner to help evaluate the institution’s internal programs and practices, as well as assess those of its competitors, TTU chose Blackboard.

Tailored to TTU

Starting first with a fact-finding mission within the university, the Blackboard team hosted discovery sessions with stakeholders to better understand each organization’s practices and objectives. Blackboard then customized the research approach to meet TTU’s goals. The highly collaborative process involved collecting a breadth of both internal- and student-facing information, including marketing materials, website messaging and navigation, program and enrollment data, student feedback, and more.

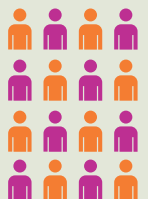
Armed with a comprehensive view of TTU’s eLearning department, Blackboard applied a blend of third-party and primary research methods to benchmark TTU against its top competitors. Key dimensions included: cost, programs offered, delivery format, enrollment trends, brand, positioning, marketing activity and channels, recruitment and lead nurturing efforts, and media investment. The findings were both surprising and validating.

Within just six months, Tech experienced a

17% INCREASE IN APPLICATIONS

+ 25% INCREASE IN ENROLLMENTS

in just one year—that’s **12,000+ STUDENTS** (fall 2016 – 2017)



A methodical approach

Blackboard uncovered new insights that provided a clear path forward with concrete recommendations. The methodical approach included:

- › Assessing the university’s current online programs and potential whitespace growth opportunities (Program Viability)
- › Understanding competitors’ strengths and weaknesses, and areas of opportunity (Competitive Analysis)
- › Uncovering ideal target student audiences (Audience Segmentation)
- › Identifying differentiators and leading benefits to inform messaging (Marketing Plan)
- › Understanding investment options and creating a plan of action (Financial Model)



Blackboard helped us build the case for change. They provided us with actionable information that has informed our go-forward strategy, and they presented the findings to our colleagues, which helped us gain buy-in across campus.”

Dr. Justin Louder, Assistant Vice Provost and Assistant Professor of Practice of Worldwide eLearning, Texas Tech University

The result: a comprehensive analysis that highlighted “low-hanging fruit” (such as website updates) as well as longer-term strategic wins (including competitive differentiation, messaging, and program selection). “We couldn’t have done this without Blackboard,” says David R. Hankins, Senior Director of Marketing eLearning and Academic Partnerships with TTU. “We simply didn’t have the resources or the expertise to thoroughly vet and quantify opportunities the way that Blackboard could.”



The information has been absolutely invaluable. I refer to the Blackboard reports on a weekly basis. We’re still unpacking the wealth of information, even a year later.”

David R. Hankins, Senior Director of Marketing eLearning and Academic Partnerships, Texas Tech University

Actionable insights

In addition to overhauling their website, the TTU team has implemented other recommendations as a result of Blackboard’s research—from the way it nurtures enrollment leads and the portfolio of programs it offers to the types of students it targets.

Continuing the conversation

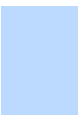
With the Worldwide eLearning organization’s new plan underway, the university set its sights on strategizing the future of Tech’s K-12 program, “TTU K-12.” Within two months of receiving initial brand findings from Blackboard, the program significantly improved its go-to-market strategy and perception within the marketplace.



Let’s talk

To read more examples of how institutions like yours have solved student lifecycle challenges, visit: [Blackboard.com/lifecycleservices](https://blackboard.com/lifecycleservices)

Appendix 3 – Case Study UTEP



The University of Texas at El Paso Grows Online Program Arm with Multi-Channel Digital Marketing Strategy



THE UNIVERSITY OF TEXAS AT EL PASO
UTEP CONNECT
 EXTENDED UNIVERSITY

Blackboard helps UTEP Connect strike the right balance of paid and organic marketing for predictable, long-term growth

The University of Texas at El Paso (UTEP) is a public research university in El Paso, Texas. UTEP is among the largest and most successful Hispanic-serving universities in the US, with a student body of over 25,000, which is over 80% Hispanic, and prides itself on a strong record of advancing educational access and academic excellence.

Connecting Nontraditional Learners with High-Quality Education

In 2015, to help meet the needs of the growing number of nontraditional learners, UTEP launched UTEP Connect, a centralized hub for online programs designed for adult learners, those in the military and law enforcement, and students returning to finish their degrees. Today, UTEP Connect offers nearly 25 fully online programs from across the University: degrees at the bachelor's and master's levels and graduate certificates in a variety of areas.

Partnering for Growth

☀️ Paid and Organic: Better Together

Paid advertising, while an effective way to generate fast awareness and response in the market, needs to be supported by a strategic SEO-driven organic content for sustained success.

Together, these two marketing approaches generate continued awareness of UTEP Connect's online programs, maintain a strong pipeline of prospective students, and engage and nurture leads until they are ready to enroll.

In 2016, University leaders enlisted Blackboard’s [higher education marketing services](#) to help expand awareness and enrollment for UTEP Connect across Texas and beyond with a research and data-backed digital marketing strategy.

In the four years since, the partnership has evolved to stay ahead of changing market dynamics; while early efforts centered around building awareness of UTEP Connect among its target demographics, strategy now also focuses on overcoming increased competition and standing out in a crowded online marketplace.

Today, Blackboard helps drive predictable and reliable enrollment growth for UTEP Connect’s online programs with a multi-channel digital marketing strategy backed by market research and audience insights:

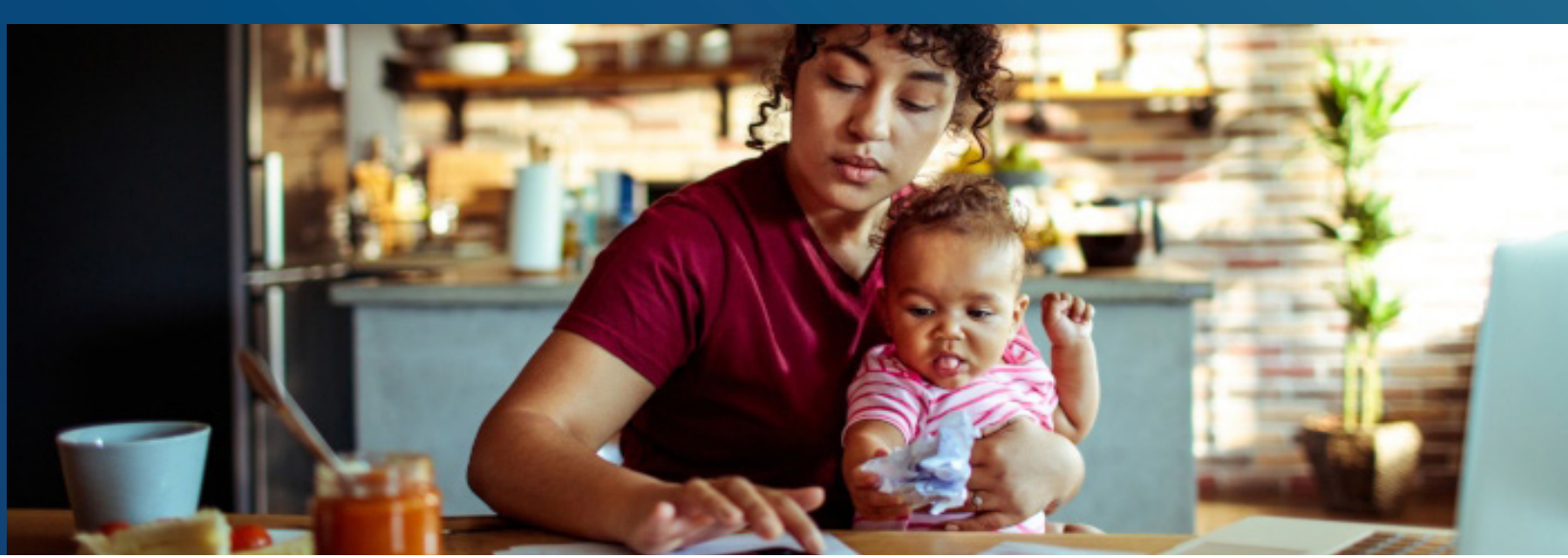
<p>Organic marketing services to engage, nurture, and enroll prospective students at various stages of the research and decision process</p>	<ul style="list-style-type: none">▶ Search engine optimization (SEO) for UTEP Connect’s website: technical audits, keyword analyses, on-page optimizations, and UI/UX audits▶ Content marketing strategy and management: SEO-driven blogging, infographics, eBooks, and animations▶ Social media strategy and management: daily posting and creative assets for two platforms, boosting, and reporting
<p>Paid media plan designed to reach prospective students where they are online when they’re ready to act</p>	<ul style="list-style-type: none">▶ Planning and execution of a targeted digital advertising strategy for expanding the pool of qualified leads for UTEP Connect programs:▶ Custom creative development for text, social media, and display advertising, retargeting, and a microsite focused on lead generation▶ Media placement and active media management▶ Regular testing and reporting

Tracking is built into every piece of the enrollment funnel for transparency, reporting, and ongoing campaign optimization.

2020 Results and Analysis

Each year since 2016, UTEP Connect has seen incremental growth in key metrics such as leads, applications submitted, and enrollments directly attributable to the Blackboard partnership.





Overall results for 2020, including both paid media and organic marketing activities:

- ▶ **Leads** – 120% to goal, up 18.5% from 2019
- ▶ **Applications** – 90% to goal, up 21.5% from 2019
- ▶ **Enrollments** – 213% to goal, up 4% from 2019

Data Point

Organic marketing contributed to **5% of all leads** in 2020 and these leads **converted to enrollments at a faster pace** than inquiries generated through paid advertising.

In addition, Blackboard performed multiple SEO audits: a technical SEO audit, a UI/UX analysis, and a keyword exercise. The UTEP team implemented all recommendations, leading to a 150% year-over-year increase in organic users to the UTEP Connect website. Organic search is now the largest driver of traffic to the UTEP Connect website, contributing close to 81% of all traffic, up from 70% in 2019.

Based on total annual investment (including paid media and organic marketing budgets) and enrollments in 2020, Blackboard's services yielded returns of 4.5x average tuition revenue for one academic year and 13x average tuition revenue for a completed degree.*

“One of the best things about working with Blackboard is that it is a true partnership. They bring us research, analysis, and insight, but they also listen to our ideas and help turn them into strong marketing initiatives and materials. They are immediately responsive to our requests and always enjoyable to work with. We could not have picked a better partner to help us market and grow our online programs at UTEP.”

– Beth Brunk-Chavez, Dean, Extended University at UTEP

*The return-on-investment calculations are based on UTEP's 2020-2021 in-state tuition for online classes and assume an average of three (3) semesters per calendar year, with an average of 12-15 credits per enrolled student.



Summary

In a highly competitive and noisy digital environment, universities need comprehensive marketing strategies to be heard and seen favorably by prospective students.

Since 2016, UTEP and Blackboard have sustained continued growth for UTEP Connect online programs with a research-backed strategy that combines organic marketing and paid media advertising. In 2020 alone, this holistic approach resulted in higher-than-expected leads and enrollments and delivered a 13x return on UTEP's investment.

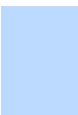
Experience the Power of a Multi-Channel Digital Marketing Strategy in Student Recruitment

Build your institutional brand, increase lead generation, and improve enrollment yield. Blackboard's integrated marketing strategies combine the pillars of modern search and digital marketing to attract and convert the right students in support of your overall growth strategy.

Learn more about comprehensive marketing strategies for student recruitment.

Learn More at [Blackboard.com/Marketing-Services](https://blackboard.com/marketing-services)

Appendix 4 - Case Study Wichita State University



Blackboard®

Enrollment in online programs double through research-driven marketing.



WICHITA STATE
UNIVERSITY



www.wichita.edu



Wichita, Kansas



14,000+ students

Founded in 1895, Wichita State University (WSU) offers more than 60 undergraduate, graduate, and doctoral degree programs in more than 200 areas of study at six colleges and several satellite locations.

Like many higher education institutions, WSU had been offering online degree programs for several years, providing flexible options for both their undergraduate and graduate student bodies. Having recently completed a Strategic Enrollment Management planning initiative, the administration set an ambitious university-wide enrollment growth goal of 110% to be met by 2020. This included WSU Online, where six programs were targeted as part of a pilot to increase exposure of the university's distance learning opportunities.

With aggressive goals in place, WSU Online turned to developing new marketing strategies. However, the path to achieve those goals was not clear. There had been limited coordination between the enrollment and marketing areas of the University in the past, which meant that the online team needed to independently find the expertise they needed.

Seeking the right partner

WSU Online decided that an outside vendor would offer them the right expertise, attention, and resources they needed to meet their goals. However, finding the right partner was more difficult than expected.

"We looked at a few different vendors," says Mark Porcaro, Executive Director of Online Learning, "and most of them had some of the pieces we were looking for. One firm was strong on the planning side, but hands-off when it came to execution. One vendor was lacking in technology."

WSU Online then discovered that Blackboard, with whom the University had an existing relationship, had wide experience in higher education marketing.

"Blackboard stood out on all fronts," continues Porcaro. "They had expertise in strategic planning and tactical execution. They could provide the 24/7 staffing we needed, and they also had the experience and resources to pull off the aggressive, six-month implementation deadline we'd set for ourselves."

Blackboard met with key WSU leadership and once the objectives and expectations were agreed upon, the real work began.

After just the first year,
WSU achieved its 2020 goals

117% INCREASE IN
APPLICATIONS

+ 110% INCREASE IN
ENROLLMENTS



Creating a comprehensive solution

Blackboard started by helping WSU Online identify the right audiences for the programs they wanted to target. To achieve this, they developed a survey that collected student preferences and measured demand for the specific online programs WSU offered.

Once the research had been analyzed and reviewed with WSU leadership, the Blackboard marketing team created a matrix of nuanced messaging based on audience, program, and market. This ensured that every communication would be truly relevant and honed to that audience's interests.

With concise, differentiated messaging mapped out, Blackboard developed a comprehensive enrollment marketing campaign, centering on attracting quality students and expanding into new markets. This was bolstered by proactive outreach to prospective student leads to ensure students were motivated to complete their applications and more likely to enroll.

Blackboard provided daily marketing management and accountability for campaign performance, measuring leads, applications, and enrollments to ensure the results were meaningful and on target.

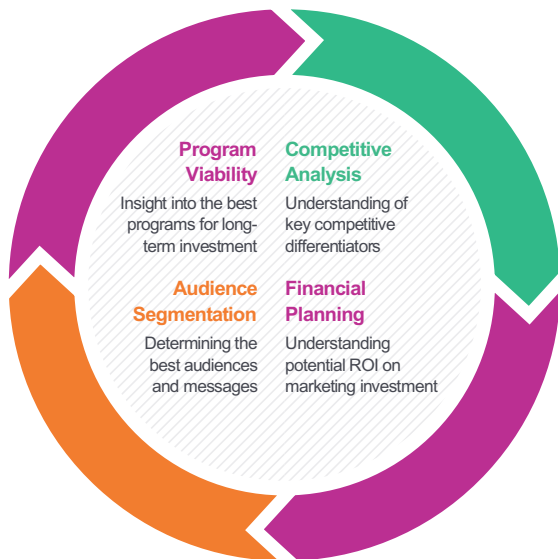


As a partner, Blackboard is very student focused and truly understands that Wichita State's mission is to help our students succeed. They're making us happy by making our students happy, and we know that this is a model that will carry forward as we build our online presence."

Mark D. Porcaro, Ph.D.
Executive Director of Online Learning, Wichita State University

Far exceeding expectations

After just the first year, WSU Online has already achieved its 2020 enrollment goals, increasing applications to their programs by more than 117%, and doubling enrollment to more than 400 students.



Furthermore, the marketing solution generated:

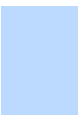
- › 140% increase in prospects
- › 110% increase in enrollments
- › 9x enhanced return on investment
- › 157% increase in new online students

These strong results also secure marketing investment for a greater range of the university's online programs, well beyond the six pilot programs. WSU and Blackboard have since expanded their partnership to now include marketing support for their graduate, undergraduate, and international enrollment endeavors.

Let's talk

To read more examples of how institutions like yours have solved student lifecycle challenges, visit: [Blackboard.com/studentservices](https://blackboard.com/studentservices)

Appendix 5 – Case Study Johns Hopkins University





Johns Hopkins Carey Business School Drives Growth in their Executive Education Program



Challenge



The Carey School of Business at Johns Hopkins University had successfully launched and grown their Executive Education (Exec Ed) division through a focus on their internal market, inclusive of Hopkins University and Hospital staff. The team was interested in expanding beyond internal opportunities to explore growth potential in the external market, and sought out a new partner with the experience and expertise to help accomplish this goal.

Solution



JHU Exec Ed partnered with Blackboard Student Services on a number of solutions, ranging from website design support, to email strategy and execution, to paid media planning and execution. Results have been impressive, with external registrations more than quadrupling year over year, contributing to the Exec Team reaching their stretch growth goal for the current fiscal year.

The Exec Ed partnership launched with a focus in Email, Content, Social Media Marketing, and Website design support, as well as a framework to help execute on development of Employer Partnerships. After setting the foundation for marketing to the external market through these strategies, the team sought to amplify efforts by adding on paid media services, which included a robust marketing plan complete with audience and competitive insights, as well as a media plan to ensure optimal return on investment through the right channel mix and targeting strategies.

In response, Blackboard developed a holistic, strategic plan to help make the case for investment into the external market, as well as B2B and alumni efforts. The framework of the partnership was revised with the goal of maximizing their investment to leverage internal resources when available, and allowing Blackboard to plug in as an extension of the team, working towards the larger goal of continued growth for Exec Ed.

To learn how we can help your institution create measurable impact to grow enrollments and improve retention, visit: blackboard.com/student-services



Executive Ed Performance Snapshot

- › **+49% increase in earned revenue, YoY**
- › **292% increase in external leads, YoY**
- › **311% growth in external registrations, YoY**

**Results inclusive of (but not limited to) Blackboard partnership.*

Appendix 6 – Anthology Transfer Protocol



Table of Contents

1	Overview	2
1.1	Systems and Security	2
1.1.1	Customer Data Security	Error! Bookmark not defined.
2	Data Mapping Worksheet	4
2.1	Specifications	7
2.2	Attributes	4
2.3	File Transfer Logistics	7
2.4	Client Support Information	7

1 OVERVIEW

Anthology Student Services (Anthology) requires foundational user information to provide support to end users. Anthology relies on the client to provide enough information for us to contact a student and have some basic information to support the interaction.

The client will provide user information via file generated at certain intervals (daily) to make sure our system matches the system of record (institution's SIS and/or CRM). This file will be uploaded via SFTP to an Anthology ftp site. Anthology will grab the file and run into our system at corresponding intervals to sync systems.

As records are created in our system, Anthology will send back the unique identifier for each record so that the school has a way to match records.

When an application status is updated in the institution's SIS and/or CRM, the client should send an updated record with the new application status.

1.1 SYSTEMS AND SECURITY

Anthology takes the utmost care in protecting customer data. We adhere to the payment card industry data security standard (PCI DSS). This standard emphasizes the high regard we put on protecting our customer data. Customer data provided to Anthology is hosted internally without access from external systems or the internet.

2 REQUEST FOR INFORMATION (RFI TO ANTHOLOGY)

The Request For Information (RFI) form is either hosted by Anthology or the client. The information collected in this form is imported into Anthology's CRM system and stored.

2.1 ATTRIBUTES

Following are the standard attributes that cannot be changed or reordered as they will be associated with a given user.

Field	Description	Mapped to in Anthology System
First Name	First name of inquiry	First Name
Last Name	Last name of inquiry	Last Name
Phone	Primary phone number of inquiry	Phone
Email	Primary email address of inquiry	Email

Field	Description	Mapped to in Anthology System
Anticipated Start Term	Term for which inquiry is interested in enrolling	Anticipated Start Term
Anticipated Start Year	Year for which inquiry is interested in enrolling	Anticipated Start Year
Program of Interest	Drop down list of available programs: <ul style="list-style-type: none"> Please add all available programs <u>exactly</u> as they should appear Add program name(s) here 	Program of Interest

3 NEW LEAD FILE (ANTHOLOGY TO CLIENT)

For most projects, the information collected on the RFI is imported into Anthology’s CRM system and stored.

3.1 ATTRIBUTES

Following are the standard attributes that are stored in Anthology’s CRM system and exported into this file. The client is responsible for importing and storing these data in their own CRM/SIS system. In order to update the record in our CRM when the student applies, accepts, enrolls, etc. the client needs to store this record (along with the unique identifier)

Field	Description
UUID	Unique identifier in Anthology system associated with record
First Name	First name of inquiry
Last Name	Last name of inquiry
Phone	Primary phone number of inquiry
Email	Primary email address of inquiry
Anticipated Start Term	Term for which inquiry is interested in enrolling

Field	Description
Anticipated Start Year	Year for which inquiry is interested in enrolling
Program of Interest	Name of program inquiry selected on request for information form.

4 UPDATE FILE (CLIENT TO ANTHOLOGY)

The exported flat file consists of **pipe-delimited** strings which are converted into native data types. This data then provides identification of the caller as well as the resource by which Anthology Student Services Counselors can assist those callers.

4.1 ATTRIBUTES

Following are the standard attributes that cannot be changed or reordered as they will be associated with a given user. If attribute does not apply, send a null value in the field.

Column Header	Type	Required	Description	Client Specific Mapping (Data Source)
UUID	String	**Required	Universally Unique Identifier. Can be student ID or another unique identifier.	
FIRSTNAME	String	**Required	Students First name	
LASTNAME	String	**Required	Student Last Name	
PHONE1	String	**Required	The primary phone number of the prospective student	
PHONE2	String	**Required	The secondary phone number of the prospective student	
EMAIL1	String	**Required	The school-defined primary email address of the student	
EMAIL2	String	**Required	The secondary email provided by prospective student	

Column Header	Type	Required	Description	Client Specific Mapping (Data Source)
ADDRESS	String	**Required	The street address provided by prospective student	
CITY	String	**Required	The city of residence of the prospective student	
STATE	String	**Required	The state of residence of the prospective student	
ZIP	String	**Required	The zip code of the prospective student.	
APPLICATION_STATUS	String	Required once received	This field will help our coaches understand the current application status of the student. (ie. No Application, Application Started, Application Submitted, etc.)	
APPLICATION_PROGRAM	String	Required once received	The program that the prospect chooses to apply to.	
APPLICATION_TERM	String	Required once received	The term that the prospect chooses to apply for.	
APP_START_DATE	Date	Required once received	The date the prospect starts their application	
APP_SUBMIT_DATE	Date	Required once received	The date the prospect submits their application/pays app fee.	
APP_COMPLETE_DATE	Date	Required once received	The date all documents are received, and application is complete and ready for review.	
ADMIT_STATUS	String	Required once received	The status of the admission decision. (ie. In Review, Accepted, Denied)	
ADMIT_DATE	Date	Required once received	This date an admissions decision was completed.	
REGISTERED_DATE	Date	Required once received	This is the date the student registered for class.	

Column Header	Type	Required	Description	Client Specific Mapping (Data Source)
ENROLLMENT_STATUS	String	Optional	The overall status of the enrollment process (ie. Inquiry, Applicant, Completed Applicant, Admitted, Registered).	

4.2 SPECIFICATIONS

The following is a list of data file specifications:

- The file should be delivered in a plain text pipe-delimited format.
- The first row of the file should contain the column headers exactly matching the fields in each record as shown in the Attributes section below.
- The records should be delivered as shown in the example below, first column listed first.
If no data is to be provided in the column, the column will be left blank.
- File Name convention
 - Single Daily File: [customer name]_upload_mmddyy.txt
 - Multiple Daily Files: [customer name]_upload_mmddyy_hhmmss.txt
 - Hh=Hour
 - Mm=Minute
 - Ss=Second

4.3 FILE TRANSFER LOGISTICS

This section captures the logistics of the file transfer.

The sample file, initial full file, and on-going incremental files should be submitted to the SFTP server.

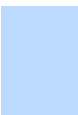
Description	Examples	Client Input
File Upload Time	4:00am	
SFTP Server	ftp.Anthology.com	n/a
SFTP Credentials	Anthology_ftp <i>Provided Securely</i>	n/a
SFTP Folder	Client Name	
User File Type	Full or Delta	
Start Date of Schedule Upload	3/3/2020	
Frequency	Daily (recommended)	

4.4 CLIENT SUPPORT INFORMATION

This section captures the name of the client team that will support the extract moving forward. In case there are issues with the user extract and the account manager reaches out to the client, issues with the user extract will be managed by the person/ team listed below.

Extract owner (Title)	
Extract contact (Email/ Phone)	

Appendix 7 – Case Study Wayland Baptist University



Wayland Baptist University Sees Retention Gains with Help from Blackboard



Blackboard

Wayland Baptist University (WBU) is a private Baptist university based in Plainview, Texas. The university has approximately 5,000 enrolled students, three quarters of whom are undergraduates. In addition to its main campus in Plainview, WBU has multiple satellite campuses across six states, American Samoa, and Kenya, and a virtual campus, WBUonline.

THE CHALLENGE:

Harnessing data-driven insights to maximize student retention and success

Some 58 percent of institutions rank student retention as higher education's most critical issue. That's no surprise, as higher student retention leads to better student graduation rates and success in the job market. With the

success of their students in mind, WBU officials made the forward-thinking decision to employ a proactive strategy to intervene with students before they decide to drop out and provide them with resources and support to help continue toward graduation.

WBU relies on various Blackboard solutions, including Blackboard Learn as its teaching and learning platform, predictive data for identifying at-risk students, and Enrollment Services for a streamlined enrollment process. When it came to developing and deploying a plan to maximize student success, the university turned to Blackboard Student Services for its expertise and experience with data-driven student retention in higher education.



A program that reaches at-risk students before it's too late

WBU partnered with Blackboard to deliver a program aimed at improving student retention by proactively contacting students as soon as they show up as a risk of failing their academic course. The campaign began in November 2019 and will continue running through Winter 2021 to measure term-to-term and year-over-year results. The goals for the program, *Retention Coaching Powered by Predictive Data*, were threefold:

1. Develop a scalable proactive outreach program that increases term-to-term retention of at-risk students by six to eight percentage points.
2. Collect reliable data on WBU's current retention rates to inform future student success efforts.
3. Gather qualitative information to better understand how students decide to return to WBU, take a term off, or withdraw.

To measure effectiveness, the Blackboard and WBU teams would compare term-to-term and year-to-year persistence of a coached group of students with a control group of students who would not see any intervention. The



coached and control groups were balanced on variables that predicted student persistence, such as campus location, degree level, credits earned, academic program, and start date.

To account for the fact that high risk students require a different level of support than low risk students, Blackboard Student Services delivers unique outreach strategies based on the student level of risk of dropping. High risk students receive more outreach via multiple channels (phone, text, email) while outreach to low risk students includes fewer touches. This allows for a strategic, individualized approach to contacting students, rather than blanketing students of different risk groups with the same message using the same channel.

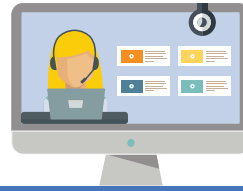
With student risk scores changing daily, the Blackboard Coaching team refreshes their outreach list regularly using algorithms within Blackboard Data. The algorithm uses data points within WBU's student information system, combined with daily updates from the Blackboard Learn learning management system to flag at-risk students. These indicators include but are not limited to cumulative GPA, class GPA, attendance, length of login, last login, previous term GPA, registration for next term, and financial aid documents.

A Holistic Coaching Approach

Blackboard's coaching model focuses on the whole student, not just academic concerns. According to Alby Salsa, Blackboard's Senior Director of Enrollment and Retention Solutions, "Our experience has been consistent with industry research which shows that most student attrition is due to non-academic issues. Today's learner balances many external commitments—their job, family, school, and more—and it's common for students to drop out of school when it becomes hard to juggle all of these responsibilities. In those critical times where a student is considering dropping out of school, it's important they remember their primary motivation for enrolling, and that they have a coach to encourage them and help create specific action plans to mitigate their immediate challenges."

Blackboard's coaching model is grounded in a structured framework that enables coaches and students to have a clear assessment of student risk factors across multiple focus areas that is not limited to academics alone. Once the student has identified their core risk factor, the coach has various methods to help them address it, ranging from student-facing coaching tools, providing recommendations, or referrals to campus resources.

Program Results: First Term



Students in the coached group registered for the Spring 2020 semester at a rate **seven percentage points higher** than that of students in the control group.

12% increase in student retention from winter to spring for the coached group.

Coached cohort registered for Spring 2020 at a rate of **65%** compared to **58%** registration rate of the non-coached population.

78 at-risk students registered for the Spring 2020 semester after talking with a coach.

76% of live coach eligible students registered for the next semester.

“Blackboard’s retention program provides our online students with the proactive support they need, when the need it. I appreciate that the Blackboard coaches quickly follow up with students as soon as they show up as a risk, and when necessary they put these at-risk students in contact with university resources, such as our advising team. I am very pleased with the retention gain that this program has produced.”

Patricia M. Ritschel-Trifilo, Ph.D., Director of WBUonline, Wayland Baptist University

Results

The first-term results showed that students in the coached group registered for the Spring 2020 semester at a rate seven percentage points higher than that of students in the control group. The first-term results also generated reliable data about WBU’s current retention rates, as well as rich qualitative information from students’ conversations with Blackboard Success Coaches about their decision-making process.

Summary


Blackboard and WBU successfully harnessed data-driven insights to deliver a proactive outreach campaign to students at risk of dropping out of college. The first-term program has resulted in a higher term-to-term retention compared with a control population and provided WBU with valuable quantitative and qualitative data to help drive future student success efforts.

“Blackboard’s retention program provides our online students with the proactive support they need, when they need it,” said Patricia M. Ritschel-Trifilo, Ph.D., Director of WBUonline. “I appreciate that the Blackboard coaches quickly follow up with students as soon as they show up as a risk, and when necessary they put these at-risk students in contact with university resources, such as our advising team.”

“I am very pleased with the retention gain this program has produced.”

[CLICK HERE TO LEARN MORE](#)

Appendix 8 – Case Study Walden University



Measuring the Impact of Financial Aid and Student Support Services on Course Registration at Walden University

WALDEN
UNIVERSITY

An early pioneer in distance education, Walden University was established in 1970 to make advanced degrees more accessible to nontraditional learners. Today, Walden continues that mission with online programs designed for adults and others who need a flexible path to a high-quality education. Approximately 48,000 students are currently enrolled in the university's 80+ online bachelor's, master's, doctoral, and certificate programs.

Helping Students Overcome Barriers to Their Education

For many students today, financial aid is the most important factor to educational success and completing a degree. If a student with a potential financial aid obstacle can't find help or be directed toward a solution, they may risk attrition.

This critical issue surfaced at Walden in 2019 when support staff were struggling to keep up with an influx of financial aid calls and chats, resulting in long hold times for students and overtaxing agents. Recognizing the broader implications of providing students with fast and easy access to financial aid support, Walden leaders made the strategic decision to enlist Blackboard's [One Stop](#) services to supplement the university's in-house team.

With the partnership, Blackboard would provide Walden students with 24/7 financial aid support via phone, online self-service, and mobile apps. (Around-the-clock availability was particularly important for Walden's large student body of working professionals who need service access during nonconventional hours.)



GOALS

Walden University ▲
Graduation ceremony

Blackboard and Walden leaders hypothesized that by making it easier to access financial aid information and assistance, Blackboard One Stop would enable students to register for their courses unencumbered by financial aid holdups.

Therefore, in addition to improving standard operational-level call center metrics such as average hold time, average speed to answer, etc., goals included:

- 🎯 Measure the impact of the Blackboard service on term-to-term retention against a control group of financial aid inquiries handled by Walden staff.
- 🎯 Expand coverage for financial aid support inquiries to meet growing student demand.
- 🎯 Increase the number of resolutions to potential barriers, such as finance-related holds, that might otherwise prevent a student from registering for the following term.

APPROACH

Between 2019 and August 2020, Blackboard fielded more than 141,000 financial aid support calls from 60% of the student body. Next-term course registration rates were then tracked across the 60% of students who interacted with Blackboard versus the 40% of students with no Blackboard interaction. Additional data analysis was performed to better understand the impact of Blackboard services by degree level, registration account holds, student GPA, and other factors.



RESULTS

The term-to-term retention rate for students who interacted with Blackboard was 26% higher than the comparison group.

Additional analysis revealed:

- ☀ Blackboard-handled students registered for courses at higher rates across every program level: doctoral (27%), master's (26%), and undergraduate (26%).
- ☀ Students supported by Blackboard registered for courses at higher rates across all GPA bands. The greatest difference was in students with a 2.0 GPA, who registered at a rate nearly 73% higher than the comparison group. Students with a 2.5 GPA registered at a rate 53% higher than the comparison group and students with a 3.0 GPA registered at a 48% higher rate.
- ☀ Students with one or more financial holds on their account were 31% more likely to register for the next term if engaged by Blackboard than the control group.
- ☀ Of the colleges within Walden, the College of Health Sciences had the greatest differential between Blackboard handled and non-handled students with a 32% difference, followed by the College of Social and Behavioral Science (28%) and the College of Nursing (26%).

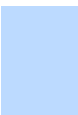
Summary

Blackboard and Walden successfully partnered to better serve students who might otherwise have been at risk for attrition due to financial aid support problems. Blackboard One Stop services resulted in a term-to-term retention rate for students who interacted with Blackboard that was 26% higher than the comparison group, providing Walden with valuable quantitative and qualitative data to help drive future student success efforts.

Provide students with accessible and comprehensive support to help them persist and succeed. Learn more about Blackboard's One Stop solutions.

**LEARN
MORE**

Appendix 9 - Rate Card



Anthology Instructional Design Services		
Service	Pricing	
	Cost	Unit
Strategy development	\$93K - \$115K	Lump Sum
Consulting	\$200.00	Hourly
Course development	\$6250/course	Lump Sum
Project management	\$200.00	Hourly
Licensing of content	250/hour	Lump Sum
Instructional design support	\$200.00	Hourly
Media creation	\$30K	Lump Sum
Marketing and student acquisition	% of Media	Per Project
International student recruitment services	\$47	Per Student
Installation fee	\$20,000	Lump Sum
Hosting and storage cost	N/A	Monthly
Training	250/hour	Lump Sum
Per-student fee	\$100	Per Student
License fee	\$38,800	Lump Sum
Third-party costs (e.g. integration, third-party licenses, optional add-ons)	N/A	Mark-Up
Annual maintenance	N/A	Annual Fee
Off-campus site(s) for in-person instruction	N/A	Monthly
Other fees as appropriate (please describe)	\$20,000	Lump Sum
Cost share*	N/A	
Revenue share*	N/A	

Anthology Marketing & Enrollment Services		
Research & Strategy	Unit	
	Cost to Client	Unit
Primary Research	\$30,000	Lump Sum
Program Viability Research	\$35,000	Lump Sum
SEO Services and Assessment	\$8,000 - \$30,000	Lump Sum
Web Strategy and Audit	\$20,000	Lump Sum
Marketing Media Services	Cost to Client	Unit
Marketing & Media Implementation	\$45,000	Lump Sum
Up to \$250,000 in media spend	30% Mgmt Fee	% of Media
\$250,000 to \$499,999 in media spend	25% Mgmt Fee	% of Media
\$500,000 to \$999,999 in media spend	20% Mgmt Fee	% of Media
\$1,000,000 in media spend	<20% Mgmt Fee	% of Media
Enrollment & Retention Services	Cost to Client	Cost to Client
Implementation (Enrollment)	\$25,000	Lump Sum
Implementation (Retention powered by Data)	\$25,000	Lump Sum
Enrollment Coaching - Qualify & Transfer (S2L = <24hrs)	\$15	Per Lead
Enrollment Coaching - Lead to App Submit	\$60	Per Lead
Enrollment Coaching - Lead to App Complete	\$69	Per Lead
Enrollment Coaching - Lead to Enroll/Start	\$81	Per Lead
Analytics Technology (for Retention Coaching)	\$50,000	Lump Sum
Retention Coaching Powered by Predictive Data	\$85/Student	Per Student

Anthology Technical Support Help Desk Rates				
Blackboard Technical Support HD Rates				
Incident Volume Range	Price Per Incident	SmartView Per Seats License Fee	Technology Infrastructure & Acct Management (per Institution)	Implementation Fees (% of SDO per School)*
5,500	\$8.83	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
11,000	\$8.65	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
21,750	\$8.55	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
43,500	\$8.15	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
87,000	\$7.95	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
130,500	\$7.92	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
174,000	\$7.90	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
217,500	\$7.81	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
261,000	\$7.80	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
304,500	\$7.79	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
348,000	\$7.77	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
392,000	\$7.76	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)
435,000	\$7.75	\$750	\$9,500	20% (Min \$12,500/Max \$15,000)