



FURMAN

**Request for Interest
Furman University Enrollment and Marketing Research Project**

Notification Of Interest Due: July 15, 2014

Submit notifications to:
Mark Kelly
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Greenville, SC 29613

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Introduction

Furman University, a private liberal arts university located in Greenville, South Carolina, is seeking interest from prospective research partners to assist with a comprehensive enrollment and marketing research study that will help clarify and strengthen the University's identity and market position, with particular focus on the recruitment of undergraduate students.

The University has experienced recent volatility in its admission strategies and market positioning, which has led to unpredictability in net tuition revenues. In addition, there have been three transitions in Presidential leadership since 2009.

With the July 1, 2014 arrival of Elizabeth Davis, Ph.D., the University's 12th President, Furman desires to understand its strengths, weaknesses, opportunities and threats, and to adopt longer-term, data-driven enrollment and marketing strategies that will lead to market leadership among nationally ranked liberal arts universities located in the southeastern United States, while also contributing to the University's long-term financial stability.

Research Objectives

The University has identified the following broad research questions, or objectives:

1. What is the perception of Furman's strengths and weaknesses in the recruiting markets in which we compete?
2. How do those perceptions compare to our competitors?
3. What distinctive programs or offerings are most likely to present opportunities to increase applications and strengthen yield?
4. Where are the opportunities to further penetrate existing markets and to establish new markets?
5. What environmental, institutional, and market-specific threats present issues for Furman's ability to strengthen its enrollment strategies and market position?
6. What marketing and enrollment management strategies are most likely to strengthen our selectivity and yield and contribute to the overall financial sustainability of the University?
7. What financial strategies should we pursue to strengthen enrollment and market position, including tuition pricing and financial aid, and investments in marketing (to include positioning, sales/promotion, product enhancement)?

Process and Tentative Timeline

A steering committee composed of Trustees, administrators, and faculty has been appointed by the University's Board of Trustees to guide the project, including establishing goals, selecting a research partner, assisting with and coordinating the firm's work, and reporting the findings to the Board and to the University community.

The Committee includes:

Co-Chairs:

Jolley Bruce Christman, Ph.D.
Founder and Senior Research Fellow, Research for Action, Inc.

David Trone, Class of 1977
Owner/President, Total Wine & More

Members:

Gil Einstein, Ph.D.
Professor of Psychology

Brad Harmon, Ph.D.
Associate Director of Residence Life

Mark Kelly
Vice President for Marketing and Public Relations

Donald Pierce
Director of Institutional Assessment and Research

Brad Pochard
Associate Vice President for Admission

Todd Ruppert
Trustee, Retired President and Chief Executive Officer, T.Rowe Price Global Investment Services

Robert Underwood, Ph.D.
Professor of Marketing

Committee Staffing:

Lindsay Niedringhaus
Assistant Director for Marketing

The University desires to have an expeditious and efficient process, but recognizes that a study of this scope and long-term importance will need to be thorough and deliberate. Our goal is to have a research partner under contract and to have begun the assessment and interpretation of

existing research and environmental scans by late summer 2014, with the goal of developing and implementing the research firm's process of qualitative and/or quantitative research during the Fall 2014 semester.

In the best scenario, the firm's report would be completed prior to the Inauguration of Elizabeth Davis in March 2015 though, as noted, we can be flexible in the interest of receiving an outstanding report of findings and recommendations for strategy development.

We are asking for expressions of interest by July 15. Interested firms will be invited to campus at their expense to meet with members of the Steering Committee and to present their qualifications, expertise and experience, and process.

Following the campus visits, we will expect interested firms to submit formal proposals, including process, timelines, and fees; a deadline for submission of proposals will be established once the schedule for firm interviews is complete.

Notification of Interest

Please submit a written notification of interest with an executive summary, including:

- An overview of how your firm would manage the overall research, and how you set and reach major deadlines.
- A description of how your firm has executed similar projects (projects for both university and non-academic clients considered of interest).
- A brief description of your firm's size and organizational structure as it relates to potential services proposed, and how long your firm has been performing the services.
- A description of key staff capability, their relevant projects, and clientele.
- A summary of the staff that will be assigned to the project, and their specific roles.
- Your background and approach to working with the clients' in-house staff.
- Your intention to involve subcontractors for any portion of the project and, if so, for which portion and how you select and manage those subcontractors.
- A description of any significant growth, downsizing, mergers, and/or restructuring that have taken place in your firm within the last three years.
- Description of any potential conflicts of interest or current work with similar colleges and/or competitors (U.S. *News* Top 50-ranked liberal arts colleges).
- Description of any qualifications under special programs including Women-Owned, Veteran-Owned, Minority-Owned Business Enterprises, ADA, etc.
- Information relating to bankruptcies, current lawsuits, legal actions, or governmental investigations affecting your firm.

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