

**UNIVERSITY OF MARYLAND COLLEGE PARK FOUNDATION, INC.
(UMCPF)**

**Request for Proposal (“RFP”)
For Comprehensive Stakeholder Analysis**

Dear Christopher Simpson:

The UMCPF invites you to submit a proposal to assist the University of Maryland in completing a comprehensive stakeholder analysis, as the University embarks on a new strategic planning process and prepares for its next major marketing campaign.

BACKGROUND

The UMCPF is an independent non-profit organization whose mission is to support and help advance the University of Maryland, College Park.

The University of Maryland, College Park is the state’s flagship institution. It is the leading public research university in the region, and competes for talented students, faculty, and research grants on a national and international level. The University is ranked by *U.S. News & World Report* as 18th among the nation’s public research universities, and ranks 37th in the world--11th among American public universities--in the Jiao Tong University ranking of the World’s Top 100 Universities.

The quality of Maryland’s education has changed dramatically over the last two decades. Once an open admission institution and considered a “safety school,” undergraduate admission has become increasingly competitive, with only 44% of applicants offered admission. The middle 50% of the freshman class scored between 1170 and 1390 on their SATs, and their average HS GPA was a 3.8.

Maryland is one of the most ethnically diverse public universities. The University graduates more African American students at the bachelor’s and PhD levels than any other top 20 public university.

Known for living-learning programs and enriched undergraduate experiences, Maryland’s graduation rate is 80% for those who began as freshman. Also the State’s center for premier graduate education, 31 of Maryland’s graduate programs rank in the top 10 nationally. In addition, strong transfer articulation agreements with Maryland community colleges make the University the four-year degree institution of choice for the State’s transfer students.

While there have been marked changes in quality, affordability has become a challenge. Though Kiplinger’s rated University of Maryland the nation’s 15th best value, affordability for all institutions in Maryland—not just the University of Maryland—is ranked unfavorably compared with other states, largely as a result of comparatively low state support for public universities, both in terms of state appropriation and funds for need-based financial aid. In-state tuition has increased to rank the seventh highest in the nation--\$7,969 annually. Out-of-state students pay more than double what Maryland residents do. A focus on increased financial aid and programs for low income students has begun to address impact for the

neediest students, but far more aggressive efforts to fund scholarships are underway. Identifying highly talented students who recognize the value of a Maryland degree—and are willing to pay for it—is another area of focus.

In addition to educational enhancements and challenges, the University's improvement and momentum in other realms are also notable. In the fiscal year ending June 30, 2007, the University reached a record \$407 million in research expenditures, primarily funded by grants and contracts (placing Maryland among the leaders among universities without medical centers). This represents a dramatic increase in awareness of Maryland's strong academic reputation, and resulting support from agencies and foundations over the last decade. However another \$100M annually will be required to reach the level of other peer institutions (excluding those with medical schools, which Maryland does not have).

In 2006, Maryland kicked off a one billion dollar fundraising campaign, one of less than 30 institutions across the nation currently engaged in a campaign at that level. To date, the Great Expectations campaign has already reached \$405.2M. The campaign will run through 2011. The previous campaign, the first comprehensive campaign ever undertaken by the University, closed in 2004. Its original target was \$350M and eventually raised \$476M over seven years. The dramatic increase in fundraising capacity is in large part a measure of stronger relations with alumni. Until 1989, the University did not have campus-based alumni association. Since then, improved communication, events, and relationship building have resulted in more than 40,000 alumni donors annually, and more than 35,000 members of the alumni association. Given that there are 250,000 living alumni, more than half of which live within a two hour drive of the University, substantial additional alumni engagement and support will be required to reach the performance at peer flagship institutions—most of which have robust alumni associations that were founded more than a century ago. The University's Great Expectations campaign has strategically focused on five regions of the nation for more focused outreach: Baltimore, Washington, New York, Southeast U.S. and the West. Each region has a primary market with active and engaged alumni, as well as a larger expansion market where the potential for growth (based on number of alumni in the region) is promising.

Though research grants, fundraising, and entrepreneurial activity, the University will need to depend on its own efforts to fund enhancement of quality to a world-class level, even as it advocates for improvements in state support for higher education generally, and for the Flagship in particular. State funding as a proportion of the total operating budget of the University of Maryland has declined steadily for the past two decades. State support as a percentage of the University budget is only 25%. This trend prevails throughout the United States and is also true for the other public institutions in the State.

NEED TO UNDERSTAND STAKEHOLDER VIEWS

A comprehensive stakeholder analysis was last completed in 1995. (An executive summary and the specific instrumentation for each of the stakeholder groups can be made available to the chosen firm.) There are two primary purposes for undertaking a new stakeholder study at this time:

Development of a New Strategic Plan

The University's strategic plan has not been updated since 2000, when it chose to focus on becoming one of the nation's top public research universities. A process is underway to develop a new plan that is expected to be essentially complete by March 2008. Approval and adoption of the plan is expected to be complete in time for implementation strategies to commence before the 2008-2009 academic year. The plan will identify strategies to become a world-class research university with global influence and reach, which particularly benefits the State and region's citizens and economy. Particular interest will focus on five areas:

- Enhancing international activity (from educational experiences to partnerships),
- Revising the undergraduate core curriculum to prepare graduates who can address complex problems that require cross-disciplinary solutions
- Improving the quality of the graduate student academic experience, financial support and residential environment.
- Enhancing the opportunities for business, living and retail in the immediate area surrounding the University, improving the atmosphere and overall quality of life.
- Increasing our research capacity to the level of peers.

It is expected that the findings of the stakeholder study will not determine the direction of the plan; rather it will explore support for the general directions being pursued, so that as the plan is implemented, support can be leveraged. Similarly, potential obstacles for support among stakeholder can be identified and strategies to address them considered.

Preparing for the Next Major Marketing Campaign

The results of the last analysis in 1995 were tremendously helpful in developing marketing plans that addressed barriers to accurate awareness and strong support for the University of Maryland. The University's comprehensive visual identity program and nationally recognized branding activity were outgrowths of the analysis findings and subsequent recommendations, and they helped Maryland achieve the kind of awareness and support once unimaginable. In ten years, the University moved from 30th to 18th among public research universities, as ranked *U.S. News and World Report*. Research capacity has more than doubled. The number of high achieving Maryland students who enroll is five times greater than the number attending all other Maryland universities combined—public and private. We have chalked up nine national championships in NCAA Division I athletics. The Clarice Smith Performing Arts Center has exceeded 90% of seat capacity for every season since its opening. And Maryland Day, the University's annual open house exceeds attendance for every one-day event in the state except the Preakness. Pride among students, alumni, faculty and staff has never been greater. However, with ambitious strategic goals, challenges to remain and increase competitiveness on the enrollment front, and a clear need to develop resources more from our own efforts (fundraising, partnerships, and external research funding), increased brand support and loyalty will be crucial. An understanding of perceptions, attitudes and potential support and/or obstacles to support for strategies and goals will be crucial as we identify priorities for our next major marketing push.

SCOPE OF WORK

On behalf of the University, the UMCPF is seeking a marketing research firm to work as a partner in crafting and implementing a comprehensive stakeholder analysis. Topics to be explored (with core questions for all audiences and some variability by audiences) will include assessment of:

- The University's strengths and weaknesses;

- Its perceived position in relation to competitors/peers;
- Change in the University’s quality over the last 10 years;
- Quality of/satisfaction with interactions with the University ;
- Support for current mission as a national public research university and flagship university of the State of Maryland;
- Perceived impact and benefits;
- Potential support for world-class public research university with global influence and reach;
- Potential support for general directions of new strategic plan; and
- Hopes for the future of the University.

The University has significant internal capability for both institutional research and marketing. Thus, the successful firm will work in conjunction with staff to complement existing capabilities.

The University’s Office of Institutional Research, Planning, and Assessment (IRPA) will coordinate overall project management and will handle the data collection, analysis and report of findings related to the internal audiences. The firm will handle data collection related to external audiences, and will also work with University partners to develop consistent areas of interest across all stakeholder groups, as well as collaborate on final report of findings and implications. The Office of Marketing and Communications will work in tandem with the firm and IRPA to guide the work a steering and planning committee, which will provide campus representation, buy-in and input for the analysis and eventual findings.

A combination of quantitative and qualitative methods will be used to assess awareness of and support for current mission and significant new directions, among these audiences:

Stakeholder	Suggested Method	Administration by University or Firm	Estimated Population/Suggested Sample
Internal Audiences			
Prospective Undergraduate Students	Web survey design, administration, mail follow up and analysis by MD Resident/Non-resident, race, and entry status (frosh versus transfer)	University (IRPA)	300,000/TBD
Undergraduate and graduate students	Web survey design, administration, mail	University (IRPA)	UG 24,000/TBD

	<p>follow-up, and analysis</p> <p>Analysis of both UG and Grad by MD resident/non-resident, race, gender, on-campus/off-campus residence, and perhaps college or school.</p>		
Faculty and staff	Primarily web survey (with some paper for selected employees). Design, administration, mail follow-up, and analysis by full/part-time, exempt/non-exempt and other employment categories.	University (IRPA)	10,000/TBD
Deans and VPs	Focus groups (one each)	University (IRPA)	2 groups (5-15 each)
Parents	Web survey design, administration, mail follow-up, and analysis	University (IRPA)	TBD
External Audiences			
Alumni	Web or phone survey design, administration, phone and email follow up, analysis by year of graduation, region (2-5 comparison groups, race, and gender.	Firm	250,000/Sample to yield at least 200 responses for smallest region; 400-800 responses from region (including Baltimore and Washington). Final sample determination to be made in consultation with IRPA.
H.S. principals and guidance counselors of selected feeder schools	4 focus groups (2 each of principals and counselors) at conferences and analysis	University (IRPA)	TBD
Business leaders	40 Interviews (in-person or	Firm	40 subjects: current partners and non

	phone), plus incentive		partners at level of R&D, VP or CEO
Government influentials (including federal agency leaders)	30 Interviews (mix of in-person and phone), including small gift incentive	Firm	30 subjects: Governor, General Assembly leaders, congressional leaders, key staffers, and federal agency leaders (at the level of undersecretary or higher)
Education leaders (including select AAU presidents and Deans and Provosts at other institutions)	20 Interviews (mix of in-person and phone), including small gift incentive	Firm	20 subjects from select AAU institutions; may be possible to access at Washington meeting
Maryland registered voters	Telephone survey with sample of registered voters, with suggested analysis by regions of Maryland, represented as consistent with proportion of registered voters in each region: Western Maryland, Eastern Shore, Central Maryland and Southern Maryland.	Firm	Recommendations provided by firm are welcomed. See scope of work for additional information on sample requirements.

For each of the studies, top line findings, a preliminary analysis and report, and a final report will be required. The reports of individual studies will be compiled into an overall stakeholder analysis report, on which the firm will be expected to collaborate. The data files for each method are the intellectual property of the University and will convey at the time that the analysis is complete.

TIMELINE

We welcome the recommendations of the firm regarding completion of this report. It is likely that the successful firm will be identified in late October. The University prefers to complete data collection no later than the end of March, though earlier would be ideal. Final analysis, report and presentation must be complete by the end of May.

PROCESS TO SOLICIT PROPOSALS

This proposal process has 4 key steps:

- Firms submit written questions about the RFP.

- Answers to all questions provided to all interested firms.
- Firms submit written proposals.
- Foundation selects finalists for oral presentations.

A. Questions about Proposal

Prior to submitting written proposals, each firm may submit questions about the request. **Questions should be submitted no later than September 21, 2007** and should be addressed to Dr. Teresa Flannery, Assistant Vice President for University Marketing and Communications, and staff liaison to Foundation Board of Trustee's Marketing Committee. Responses will be provided to all interested firms no later than September 25, by the close of business.

Please limit your communications with UMCPF throughout this process to Dr. Flannery, your Single Point-of-Contact. She will schedule all meetings and receive any e-mails, faxes or telephone calls.

Dr. Teresa Flannery
 Assistant Vice President for Marketing and Communications
 Staff Liaison to UMCPF Marketing Committee
 2101 Turner Hall
 University of Maryland
 College Park, MD 20742-1531
 301-405-3316

B. Written Proposals

Your proposal is not to exceed twenty (20) pages in length and is to be submitted by close of business on Friday, September 28, 2007. Please deliver ten (10) hard copies to Dr. Flannery's office, c/o Ms. Julianna Bynoe.

Your proposal must address each of the following areas:

1. Approach to Scope of Work

- For each of the two surveys (alumni and MD registered voters) address the estimated sample sizes for the population, given a tolerance for sampling error in the range of +/-3-5%.
 - Analyses of alumni responses by graduation year and region may represent analysis by three comparison groups and two to five comparison groups, respectively, depending on costs. A minimum of 200 responses for the smallest comparison group is expected.
 - Analyses for the Maryland registered voter group may be stratified and analyzed by region, including Central MD (to include response from Baltimore City, Baltimore County, DC) Southern MD, Eastern Shore, Western MD. A minimum of 200 respondents for each region is expected. Data should be weighted proportionally to the actual household population by region.

- Specify method of data collection and follow up. Summarize methods of data analysis recommended. Identify format for report of findings, as well as suggested process for working with University partners to collaborate on analyses and final report.
- For each of the three qualitative studies (interviews with business, government and education leaders) indicate choices for method that would impact cost.
- Identify specific timeline for the completion of the project.

2. Experience

- Capability of the firm to serve clients of the scale and scope of UMCPF and the University of Maryland.
- Higher education experience.

3. Staffing

- Names, titles and years of experience for all staff who will work on this contract, with the time each staff member will contribute as a percentage of the total project.
- Identification of sub-contractors or partners and experience, if any, in working with them on similar contracts. Provide names, titles, and years of experience and percentage of time (as a portion of the total project) that any sub-contractor staff will contribute.

4. Quality

- Description of quality control and client satisfaction processes.

5. Additional Services or Firm Differentiators

- Description of other services or firm differentiators of interest to UMCPF and the University of Maryland.

6. Financials

- Identify firm's fees for this project, breaking out itemized costs for data collection, analysis and reporting for each component of the study that the firm will administer.
- General overview of the schedule and timing of billings.

II. Oral Presentations

Based on our evaluation of the written proposals, we will determine which firms will be invited to participate in oral presentations. The duration of each presentation will be no longer than 90 minutes, include follow-up questions and answers. Please limit the number of your firm's participants in the oral presentation to no more than three (3). If your firm is selected to participate in orals, we will notify you via telephone (versus Email, etc). Presentations are slated to begin by October 1 and completed by October 10, 2007.

Evaluation Criteria

Our evaluation criteria include the six areas of information solicited above for the written proposal. We will also evaluate the chemistry between our respective teams.

Background on UMCPF

Proposing firms are encouraged to visit our website at www.foundation.umd.edu for a thorough review of the foundations:

- History and vision
- Innovation, capabilities
- Leadership and board member profiles
- Financial results

For more information on the University of Maryland see www.umd.edu.

Confidentiality

By accepting to take part in this proposal process you agree to keep in confidence all information imparted to you in relation with the proposal process, not to disclose it to third parties and not to use it for any other purpose than for the proposal.

Sincerely yours,

Teresa M. Flannery

Teresa M. Flannery
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University Marketing and Communications
Staff Liaison to Foundation Board of Trustees Marketing Committee

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