1. Basic Data on Bidder

a. Name, telephone number and address, including email of Bidder

Ebiquity
646-998-7249
156 Fifth Avenue, Suite 604, New York, NY 10010
judy.bromley@ebiquity.com

b. Name and title of individual authorized to bind the Bidder and submit the proposal.

Bill Bruno
CEO – North America

c. Name, email address and telephone number of person the Board may contact during the proposal evaluation process.

Judy Bromley
judy.bromley@ebiquity.com
646-998-7249

d. Form of business – e.g. sole proprietorship, partnership, corporation, Not-for Profit organization. If a non-Iowa corporation, indicate state of incorporation.

Public Limited Company (PLC)

e. Whether the business is owned or controlled by a parent corporation. If yes, provide the name and address of the parent corporation, nearest offices and managing office where the project staff assigned to this project will be located.

Managing Office
156 Fifth Avenue, Suite 604
New York, NY10010

Chicago Office
444 North Michigan Avenue, Suite 1400
Chicago, IL 60611

Head Office London
Citypoint
1 Ropemaker Street, London C2Y 9AW

f. Whether the Bidder is a small business or certified targeted small business as defined in Iowa Code (2015) section 15.102.

Ebiquity is not a small business as defined in Iowa Code (2015) section 15.102.

2. Executive Summary – this part of the response to the RFP should be limited to a brief narrative highlighting the bidder's proposal. The summary should contain as little technical jargon as possible and should be oriented toward non-technical personnel. The summary should describe the following.

a. Bidder understands Regents' needs.

The Board of Regents located in the state of Iowa is a group of nine individuals responsible for governing various institutions. Their role is ensuring a quality education, accessible and offers public service activities the University of Iowa (UI), Iowa State University (ISU), and the University of Northern Iowa (UNI).

There are hundreds of majors offered between UI, ISU, and UNI at on their home campus, located in the counties of Johnson, Story, and Black Hawk, respectively. Also offered are non-traditional online program offerings.

The Board of Regents is considering locating a Regents Resource Center (RRC) at a campus in the Des Moines metro area where they will offer the majority of their educational programs. The one known location considered is the AIB Business School campus, which was gifted UI in January 2015.

The Des Moines metropolitan area is an optimal location, a population over 600,000 residents, and an active economy. Located in Des Moines metro area also places the universities amongst four other competing institutions of higher education: Des Moines University, Drake University, Grand View University, and the Des Moines Area Community College.

The Board of Regents goal is to offer an RRC in the Des Moines metro area that will deliver the majority of their educational programs without a compromise on educational needs of the region and the universities. The research solution we are offering will consider student demand both currently and in the future.

- Will students both undergrads and graduate be highly receptive to completing their degree programs and certificates in greater Des Moines?
- And, what is the optimal location for the Regents Resource Center? Will locating the RRC at the AIB campus be more optimal than another location within the capital city?

In order to explore demand, target audiences extend beyond the traditional current and prospective students. Because the need is to move the majority of the programs to the RRC, the Board of Regents will need to explore the ability to attract and retain qualified faculty and administrators at the RRC in the Des Moines metro area. As well, it is important to engage the interest of prospective employers of the university students, as well as ensure the universities are seen as continuing to provide quality education among regulators, accreditors, banks and other financial services organizations that provide support for students.

The Board would also like to explore motivations - What motivates a student's decision to pursue an education at the RRC rather than the main campus, online, or at another institution? We need to identify questions that maximize the behavior to choose the RRC in Des Moines metro area. For example, is the schedule at the RRC location influencing the student? Is the degree program more attractive and that is significantly motivating choice?

c. Qualifications and experience in development of strategic plans for a higher education system.

Conducted a strategic framework for Career Education Corporation

A large provider of private, for-profit postsecondary education and with a presence in both on-campus and online education was seeking to partner with a market research service provider to address brand awareness, perceptions, and reputation among target and influential audiences. They needed a strategic action plan that would develop a new brand positioning and messaging that would align with their brand's character in order to create a lasting and meaningful impression among key stakeholders.

At the time of the research, CEC was an amalgam of 16 distinct brands, each of which had a separate identity and reputation in the industry.

In order to provide our client with a complete an integrated measure of reputation, we started with a benchmark analysis of the company's standing in the media. Next our team conducted a comprehensive stakeholder research program consisting of over 5,000 qualitative and quantitative interviews with current and prospective students, faculty and administration, potential employers and alumni. The results helped our client to shape a revised communications plan for future positioning of the company.

d. Brief List and Description of Similar Projects Completed (client, scope and duration of assessment, outcome, and client contact name).

Segmentation research for a non-profit organization

A non-profit organization that provides safety-related products and services to U.S. companies commissioned our team to conduct a study in order to identify behavioral or market segments and their corresponding unmet needs and wants.

We employed a two-phased approach: Phase one- In-depth interviews were conducted to determine the issues, attributes and attitudes that are relevant to customers and non-customers. This informed the development of Phase two of the study. Phase two- Quantitative research was completed online among existing customers and by phone among non-customers to measure the prevalence of the needs and expectations of both groups.

A battery of attitudinal statements around safety needs was analyzed using cluster analysis to identify four market segments. We provided our Client with recommendations for prioritizing the segments, the tools for identifying prospects' segments, and the approach to communications most likely to motivate each segment based on their organizational needs and attitudes towards safety programs.

Client: National Safety Council
Contact: Lyn Corbett Fitzgerald
Duration: 4 to 5 weeks

Segmentation research for Alegeus Technologies - consumer directed healthcare solutions, offering the industry's most comprehensive platform for the administration of healthcare benefit accounts

Alegeus Technologies asked Ebiquity to perform a broad-based consumer research study. The study ultimately resulted in six distinct customer segments in terms of healthcare. The research findings lead to segments by assessing consumer's attitudes, behaviors and psychographics as it relates to the management and funding of their healthcare situation, and will identify ways companies offering benefit services can target and personalize offerings relevant to their needs.

An online quantitative study was conducted among the general U.S. adult population. A total sample of 5,000 respondents participated in a 15 minute survey. Quotas were set by key demographics.

Client: ALEGEUS TECHNOLOGIES
Contact: Jennifer Irwin
Duration: 4 to 5 weeks

e. High Level Project Execution Plan.

Phase I: Assessment of the Des Moines Metro Area. A comprehensive review and assessment (Environmental Scan) of the higher education industry in the Des Moines area in order to identify threats, opportunities, and leading competitors. This phase will include secondary desk research.

Phase II: Identify the key issues and trepidations – Through a qualitative method of in-depth open-ended interviews we will identify perceptions among the key academic stakeholders at the universities. This phase is meant to provide a thorough understanding of the issues faced as perceived by the key decision makers at the institution.

Phase III: – Determining the image in the Des Moines Area as it relates to RRC and higher education institutions. In this phase the research will determine the image for higher education programs in the Des Moines metro area and evaluate how optimal a location for the Regents Resource Center. Determining the image in the capital city is an essential step that determines if and where gaps exist between identity that is currently held by key academic stakeholders and the image of the community and among the key stakeholder groups.

The initial research will be an exploratory methodology among selected stakeholders.
The findings from the in-depth interviews as well as a review of the environmental scan of its competitors and the higher education industry will serve as the basis for discussion guides that will be used to conduct exploratory research. We have explored two approaches for this research – traditional focus groups and online co-creation groups. Ebiquity is recommending the co-creation method for these reasons: more convenient and suitable to this audience, is more likely to inspire creative sharing of ideas and free expression, shorter time to execute qualitative phase, and more cost-effective.

<u>Online Co-Creation Groups</u>
For this research we are recommending online groups (similar to focus groups but not in-person). The benefits of online groups include convenience to the respondent, larger number of participants, individuals can share initial ideas without pressure or influence from other members.

- Ideation: Participants are presented with a creative challenge and asked to generate ideas to address the challenge.
- Collaboration: Participants work together to make the ideas stronger.
- Evaluation: Participants rank ideas to indicate which ones they believe are the strongest. Participants typically earn an incentive for their efforts, and incentive amounts can vary by the amount they contribute.

The process will involve randomly recruiting those who are willing to share, express, and engage with the group. This online exercise will encourage both independent thinking and group brainstorming exercises using a proprietary platform to conduct these online groups. The groups will be based on a prepared topic outline guide and will viewable in 'real-time' by the Board of Regents.

The findings from these groups will be used to test ideas, finalize the language for the questionnaire used in the quantitative phase of the study and assist in clarifying the findings of the survey through a process called triangulation. The triangulation analytic process uses results from the qualitative research to clarify and further explain survey findings and in turn aid in increasing the overall reliability and usability of the findings.

Our confidence in this approach is supported by our partnership with a leading online company who recently collaborated with Columbia University on a CrowdWeaving co-creation challenge among alumni volunteers. Conclusion:

"The results were encouraging. Even when exposed to different ideation approaches, participants—regardless of whether they exhibit an adaptive or innovative style—participate equally. Even after the ideation phase, participants equally collaborated on and evaluated ideas, illustrating that a co-creation challenge can appeal to all creative styles when the opportunity is clear and expectations are well defined. Further, different methods can be employed to motivate people of different creative styles and levels to participate." Resource: KL Communications. April 2014

<u>Quantitative research</u>

Our quantitative research plan is designed to meet the Board of Regents objective of determining the current and long-term demand for various degree programs and certificates in greater Des Moines, and for discovering the optimal location in the Des Moines metro area for a Regents Resource Center (RRC) from which to deliver the majority of the educational programs.

In addition to questions tailored to these specific audiences, the quantitative study will incorporate a common set of core questions across the various surveys. These common questions will provide a means of determining commonalities and differences across the groups. Understanding areas where all groups agree as well as those where they disagree will help the Board of Regents to better understand how to meet study objectives and profile those who will utilize the RRC facility for meeting their higher educational needs.

Analysis

The key in the analysis of this study is the integration of findings from all phases of the research into a single assessment that can be used to provide direction to the Board of Regents.

The primary analytic tool we are recommending is an analysis called "key driver analysis". This is an analytic method based on a statistical process called multiple regressions. The analysis uses a statistical technique called regression that is concerned with predicting one variable by knowing others. The method predicts the values of one variable (dependent variable) such as willingness to take classes at the new RRC location in Des Moines by knowing the values of another variable (independent variable) such as level of education, employment status, family background or other related variables.

In this study, the analysis will examine each of the various factors (independent variables) that may contribute to a decision to attend at a location in Des Moines (dependent variable) and determine the likely overall contribution each of factors makes toward that overall decision to willingness to make this commitment.

Key driver analyses will also be used to identify the predictors of overall satisfaction among the stakeholder groups explored in this phase. As previously mentioned, the factors important in selecting a school may not be the same as those that result in overall satisfaction while attending that school and satisfaction upon graduation. For example, someone may select a school because of the culture. While attending that school, the main reason behind their satisfaction (or dissatisfaction) could be the faculty. Lastly, upon graduation, satisfaction may be due to the job placement efforts put forth by the college/university on behalf of their students. Identifying these drivers at three different points of student engagement will allow RRC to develop a well-rounded communications plan.

While regression analysis is meant to identify those questions which "move the needle the most" for the intended behavior or decision choice. AID has a different objective in that this technique identifies those questions that maximize the intended behavior, even if that question only moves the needle a small amount. The output from AID is a tree diagram that shows combinations of questions that yield the highest percentage of respondents for the decision variable.

One benefit of using AID is that it reports the absolute maximum that would select RRC and provides the list of questions that generate that maximum. It is likely that questions will ask which campus students plan to attend. The analytic methods above can also be used to evaluate this behavior by looking at key questions that differentiate the main campus from the RRC. Discriminant will be the analytic vehicle of choice for this analysis. Data frequencies will determine which groups are relevant for analysis.

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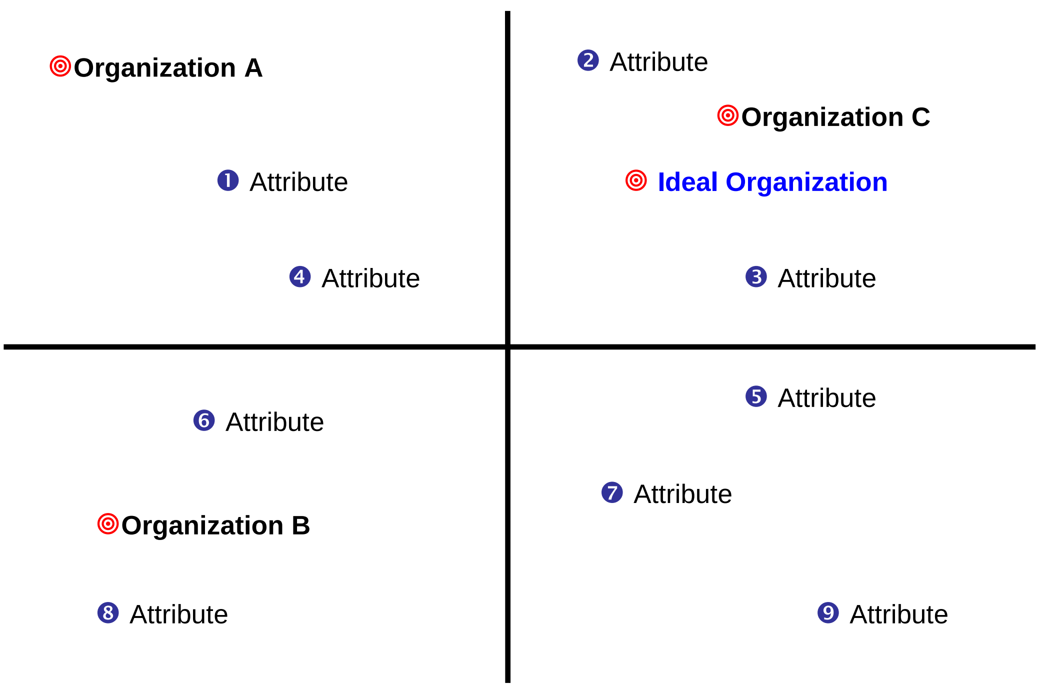
Another series of questions can address benefits which might motivate students to attend the RRC. There are two means of addressing this issue. One is to list a series of benefits and have respondents rate/rank each in terms of positively influencing their desire to attend the RRC.   This data would be analyzed via crosstabs and discriminant analysis.

Perceptual Mapping

In addition to key driver analysis, another critical analysis of the survey will be a "map" that compares the image of various schools in the Des Moines area with an ideal school or "gold standard" in a two-dimensional representation that can be used as a benchmark for measurement and also provides insights into how to position RRC against its competitors.

This map is derived using a multi-variate statistical analysis called correspondence analysis. Correspondence analysis is a statistical data reduction technique that uses data from ratings on each of the key attributes of an organization or product to determine the relative distance between each attribute and each organization rated on each of these attributes. An example of this type of analysis is as follows:



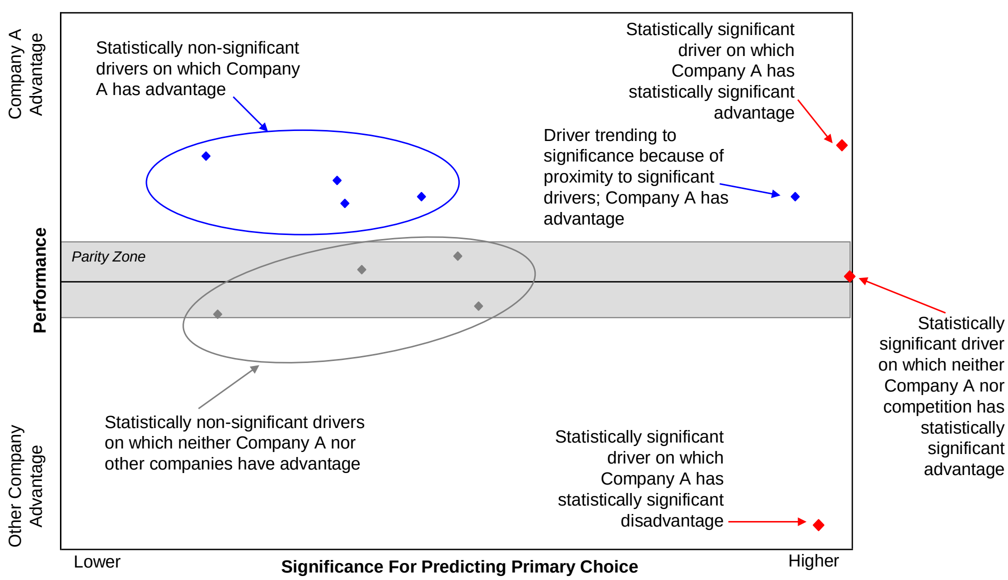
Parity Mapping

For each predictor or attribute examined in this research Ebiquity plans on collecting ratings of how the new RRC brand and competitors are perceived to perform. With this information, we are able to make a competitive assessment of your perceived strengths, weaknesses and areas on which you are perceived at parity with the competition.

We combine the output from this competitive assessment with the output from the key driver analyses onto a series of parity maps. These maps illustrate where the RRC brand has a perceived advantage or disadvantage on those factors that are significant for driving school choice, satisfaction and recommendation. From these analyses, on a brand by brand basis, you can develop a focused tactical plan for action to enhance your position of school of choice.

The following is an example of how to read and interpret the parity maps:

An Example of How to Read and Interpret The Parity Maps



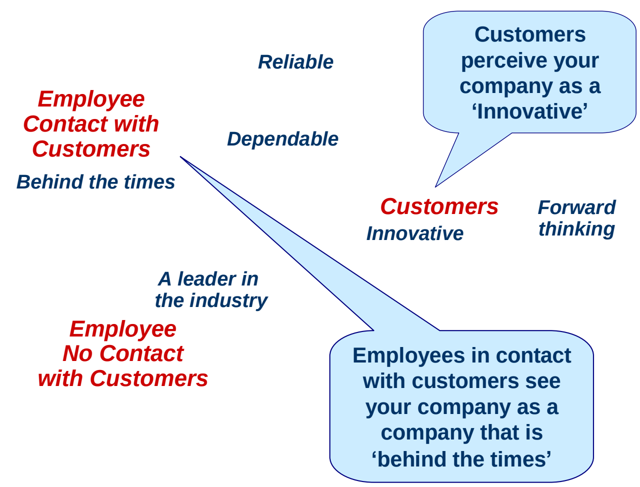
Linkage Analysis

This analysis is used to compare the results across different stakeholder groups. For each of the Universities, we can determine if perceptions vary between faculty and students, for example. The value of the analysis is that it identifies differences in attitudes or images and allows the Board to address these issues in their messaging, whether it is internal, external or both.

An example of the output is:

Linkage Analysis

- **When customers and employees perceive your company differently, mixed messages impede true understanding of your offerings.**



- The most successful corporate branding occurs when customers receive consistent messages
  - Marketing, Public Relations, and Employee communication should converge to yield the desired image.
- In the scenario depicted here, employees perceive the company very differently than customers.
  - This discrepancy has a high potential for employees to send the wrong message to customers

3. Company Background – the following information is requested to evaluate the Bidder's financial stability and ability to support the commitments set forth in response to the RFP. Please include at a minimum the following:

a. How long the company has been in business.

25+ years (formerly d/a Echo Research)

b. A brief description of the company size and organizational structure.

Ebiquity is a global company employing 800+ employees across the United States, United Kingdom, France/Belgium, Germany/Dach, Italy, Russia/CIS/CEE, Portugal, Spain, and the Netherlands.

Our U.S. offices include two locations – New York and Chicago.

The Ebiquity Executive Management Team consists of nine individuals responsible for practice management, business development, operations and finance.

- Bill Bruno, CEO North America
- PJ Leary, Chairman, Media, North America
- Maigari Jinkiri, President, Market Performance Optimization, North America
- Neil Capobianco, Managing Director, Media, North America
- Rebeca Denny, Managing Director, Market Intelligence, North America
- Geoff Greenblatt, Head of Digital, North America
- Stephanie Chastan, Head of Business Development, North America
- Kristy Ginther, Financial Controller, North America
- Sara Dobes, Head of Operations, North America

c. How long the company has been working with:

1) Higher education clients; 10 years
2) Government clients; 25 + years
3) Commercial clients performing similar services. 25+ years

d. Recent annual financial report or bank references for evaluation of financial capability to satisfactorily complete the requirements of this RFP.

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4. Qualifications and Experience

a. Additional information deemed pertinent to 2c.

U.S. Department of Education – implementation of their analytics technology on the public domain

Kennesaw State University training and education on marketing analytics

University of Illinois training and data analysis of their digital presence

DePaul University – training program for their marketing and admissions teams

DeVry – implementation of analytics across.com as well as reporting and analysis

b. A list of personnel to be assigned to this RFP, their functions in the project, length of enure, and a detailed resume of each.

Team Member and Title	Functions in the Project	LinkedIn Resume
Rebeca Denny, Managing Director, Market Intelligence, North America.	Will oversee the Client partnership and networking and provide broad level strategic recommendations and case studies.	https://www.linkedin.com/in/rebecadenny
Judy Bromley, Research & Reputation Director, Market Intelligence	Will be responsible for communicating reputation insight and analysis to the Client. Will be responsible for presenting research findings to the Client.	https://www.linkedin.com/in/judybromley
Jennifer Clark, Research & Reputation Director, Market Intelligence	Will be responsible for communicating reputation insight and analysis to the Client. Will be responsible for presenting research findings to the Client.	https://www.linkedin.com/pub/jennifer-clark/5/878/273
Christopher Martin, Associate Account Director, Market Intelligence	Research support	https://www.linkedin.com/pub/christopher-martin/12/439/75
Cara Buscaglia, Insights Director, Market Intelligence	Will provide the Client with overall creative insight and recommendations.	https://www.linkedin.com/pub/cara-buscaglia/9/508/897
Kathryn Weining, Project Manager, Market Intelligence	Research support	https://www.linkedin.com/in/kathrynwiening

c. During the last five (5) years, has the Bidder had a contract for services terminated for any reason? If so, provide full details related to the termination.

No, while we have clients opt to not renew a yearly engagement due to shifting budgets and restructures, we have not had a client terminate. Our retention rate for clients the past 3 years is the highest it has ever been.

i) During the last five (5) years, describe any order, judgment or decree of any Federal or State authority barring, suspending, or otherwise limiting the right of the Bidder to engage in any business, practice, or activity.

None

ii) **During the last five (5) years, list and summarize pending or threatened litigation, administrative or regulatory proceedings, or similar matters that could affect the ability of the Bidder to perform the required services. The Bidder must also state whether it or any owners, officers, or primary partners have ever been convicted of a felony. Failure to disclose these matters may result in rejection of the bid proposal or in termination of any subsequent contract. This is a continuing disclosure requirement. Any such matter commencing after submission of a bid proposal, and with respect to the successful Bidder after the execution of a contract, must be disclosed in a timely manner in a written statement to the Board.**

None

iii) **During the last five (5) years, have any irregularities been discovered in any of the accounts maintained by the Bidder on behalf of others? If so, describe the circumstances of irregularities.**

None

5. Statement of Scope – A clear statement of scope is required from each bidder that demonstrates their understanding of this project and how their past engagements provide them with the insight/skills/tools needed to complete this work.

Understanding of the scope: The Board of Regents has several objectives but the key part of its strategy is to continue to not compromise educational needs and demand by moving the majority of their degree programs and certificates to the Des Moines metro region.
The Board of Regents goal is to offer an RRC in the Des Moines metro area that will deliver the majority of their educational programs without a compromise on educational needs of the region and the universities.
Will students both undergrads and graduate be highly receptive to completing their degree programs and certificates in greater Des Moines?

- And, what is the optimal location for the Regents Resource Center? Will locating the RRC at the AIB campus be more optimal than another location within the capital city?

Our key execution team – Judy Bromley and Jennifer Clark have first-hand experience with delivering a strategic framework for higher education institutions. We both were key leaders in the execution of the Career Education Corporation research.

10. Methodology

a. Design/ Solution Development and Implementation Plans

Method of contact	Audience	Number of participants	Contact Resource
Qualitative – online group	Faculty and Administrators	Recruit up to 75	Board of Regents
Qualitative – online group	Current Students	Recruit up to 75	Board of Regents *(with stipulation Ebiquity would not have access to contact info)*
Quantitative Telephone	Corporate – Employers, Admissions Personnel, Policy makers	75	Board of Regents
Quantitative – online group	Prospective Students	Up to 75	Panel- proprietary sample
	Corporate – Employers, Admissions Personnel	75	Board of Regents
	Faculty/ administrators	100	Board of Regents
	High School Advisors	100	Ebiquity to procure list
	Current students	300	Board of Regents *(with stipulation Ebiquity would not have access to contact info)*
	Prospective students	300	Ebiquity to procure list
	Higher education institutions	300	Board of Regents

b. Implementation/ Consultation Phase

The overall period of time required to complete the research phase assignment is estimated at approximately eight weeks. The variability in this schedule is dependent on approvals of key data collection instruments. This schedule for the study is as follows and includes work that may be overlapping.

Project Phase	Time Required
Phase I: Assessment of the Des Moines Metro Area.	8 weeks
Phase II: Identify the key issues - in-depth open-ended interviews we will identify perceptions among the key academic stakeholders at the universities.	4 weeks
Phase III: – Co-creation groups and Quantitative Surveys	8 weeks
Analysis	3 weeks
Report & presentation	2 weeks
Total	***25 weeks***

7. References

1. Career Education Corporation (CEC) is one of the largest providers of private, for-profit post-secondary education and has a presence in both on-campus and online education. Since it was founded in 1994, CEC has progressed rapidly toward the goal of becoming the world's leading provider of quality educational services. CEC is the world's largest on-campus provider of private, for-profit postsecondary education and has a rapidly-growing presence in online education.

   Corey Hammer, Ph.D.
   Current: Principal at Talisman Insights
   Previous: Career Education Corporation
   corey@talismaninsights.com.

2. National Safety Council (NSC) - The nation's leading safety advocate for more than 100 years, the National Safety Council is a nonprofit organization with the mission to save lives by preventing injuries and deaths at work, in homes and communities, and on the road through leadership, research, education and advocacy. Working to make the world measurably safer, NSC advances this mission by engaging businesses, government agencies, elected officials and the public to help prevent the fifth leading cause of death in the U.S. – unintentional injuries.

   Lyn Corbett Fitzgerald
   Senior Director, Brand Communications
   National Safety Council
   630.775.2279
   lcfitz@nsc.org

3. Alegeus Technologies is the market leader in consumer directed healthcare solutions, offering the industry's most comprehensive platform for the administration of healthcare benefit accounts (including FSAs, HSAs, HRAs, wellness incentive, dependent care, and commuter accounts), the industry's most widely-used benefit debit card, and powerful engagement solutions to help consumers maximize savings and optimize spending for their healthcare.

Jennifer Irwin | VP Marketing
ALEGEUS TECHNOLOGIES
(O) 414-921-7506
jennifer.irwin@alegeus.com

7. Cost of Services – Submit a comprehensive price proposal that outlines rates and hour by each phase and any other costs incurred.

a. A comprehensive price proposal should be submitted on the basis of "not-to-exceed pricing" for this project. Under a not-to-exceed pricing arrangement, the contractor is compensated for hours and expenses incurred up to a ceiling amount. If additional effort is required, the bidder is expected to complete this effort at no additional cost to the Board. If less effort is required than the contract price, the Board would not be billed for the work.

	Hours	Rate	Costs
Analysis	149	$375	$56,000
Environmental Scan (6 schools + 3 Client)	350	$71	$25,000
Key Leaders (qualitative)	40	$375	$15,000
Co-creation	200	$375	$75,000
Prospective students and parents	253	$375	$95,000
Current Students & Parents	253	$375	$26,000
High School Career Advisors - IA	253	$375	$15,000
Employers, personnel, Policy, Higher Education	253	$375	$58,000
Total Costs			$365,000

b. Billings would take place at the completion of key milestones/deliverables. The Board expects bidders to propose a milestone/deliverable schedule that should assume that the Board will retain 10% of every invoice which would be released at the acceptance of the final deliverable.