



August 26, 2021

Western Oregon University
 345 N. Monmouth Avenue
 Monmouth, OR 97361

Program Order Form: Adult Learner Recruitment & Professional & Adult Education Forum

EAB Global, Inc. (“EAB” or “we”) appreciates the opportunity to work with Western Oregon University (“Organization” or “you”) in the Adult Learner Recruitment & the Professional & Adult Education Forum (the “Programs”) pursuant to the terms and conditions set forth in this Program Order Form.

I. Terms of Coverage

The following educational facilities will have access to the Programs services, which are described in greater detail in the “Scope of Services” attached to and a part of this Program Order Form:

Western Oregon University

The term of the Programs is outlined in the table below (the “Program Term(” and each year therein, a “Year”), provided that the parties may begin planning and preparing for the Programs as of the execution of this Program Order Form:

	Start Date	End Date
Adult Learner Recruitment Services*	July 1, 2021	June 30, 2024
Professional & Adult Education Forum	July 1, 2021	June 30, 2024

* For Adult Learner Recruitment Services, a “Year” shall mean the period from July 1 – June 30, or any portion thereof. All deploying campaigns will start upon first launch, which may occur prior to the Start Date listed above.

II. Financial Terms

EAB is pleased to provide the Programs for the following fees:

FY 2022

Program	Quantities	Program Costs	EAB Investments	Net Program Costs	Estimated Media Costs	Add'l Program Cost/M	Add'l Postage Cost/M
Student Journey							
<i>Audiences Receiving Multi-channel Campaigns</i>							
Student Journey Marketing Names (e-only)	28,500					\$1,950	\$201
Total	28,500						
<i>Schools Included:</i>							
Grad Wide							
Degree Completion							
<i>Additional Programs Included</i>							
Paid Search							
Professional & Adult Education Forum							
Partnership Fees:		\$451,640		\$451,640	\$95,000		
Multi-Year Partnership Discount:			(\$52,840)	(\$52,840)			
Multi Student Journey Discount:			(\$112,403)	(\$119,640)			
Total Costs		\$451,640	(\$165,243)	\$286,397	\$95,000	-	-

FY 2023

Program	Quantities	Program Costs	EAB Investments	Net Program Costs	Estimated Media Costs	Add'l Program Cost/M	Add'l Postage Cost/M
Student Journey							
<u>Audiences Receiving Multi-channel Campaigns</u>							
Student Journey Marketing Names (e-only)	28,500					\$2,008	\$201
Total	28,500						
<u>Schools Included:</u>							
Grad Wide Degree Completion							
<u>Additional Programs Included</u>							
Paid Search Professional & Adult Education Forum							
Partnership Fees:		\$475,850		\$475,850	\$123,600		
Multi-Year Partnership Discount:			(\$63,520)	(\$63,520)			
Multi Student Journey Discount:			(\$123,700)	(\$123,700)			
EAB Investment:			(\$32,230)	(\$32,230)			
Total Costs		\$475,850	(\$219,450)	\$256,400	\$123,600	-	-

FY 2024

Program	Quantities	Program Costs	EAB Investments	Net Program Costs	Estimated Media Costs	Add'l Program Cost/M	Add'l Postage Cost/M
Student Journey							
Student Journey Marketing Names (e-only)	28,500					\$2,069	\$207
Total	28,500						
<u>Schools Included:</u>							
Grad Wide Degree Completion							
<u>Additional Programs Included</u>							
Paid Search Professional & Adult Education Forum							
Partnership Fees:		\$500,000		\$500,000	\$123,600		
Multi-Year Partnership Discount:			(\$75,010)	(\$75,010)			
Multi Student Journey Discount:			(\$127,500)	(\$127,500)			
EAB Investment			(\$41,090)	(\$41,090)			
Total Costs		\$500,000	(\$243,600)	\$256,400	\$123,600	-	-

As Applicable:

Add'l Program Cost/M and Add'l Postage Cost/M will be applied if the actual quantity volumes are higher than those included in the tables above.

The estimated postage and media costs are based on then-current available postage or media rates. In the event that actual postage and/or media costs are greater than the estimated postage and/or media costs, EAB will invoice Organization for the difference. Estimated postage and/or media costs in excess of the actual postage and/or media costs will be applied as credit to other services in the current or next fiscal year as agreed upon by EAB and Organization, unless organization requests a refund of such excess postage and/or media costs.

Organization will incur the estimated list costs in the above tables, which will be invoiced directly by, and should be paid directly

to, the list providers.

Invoicing

Organization shall pay the Program Fees in accordance with the following:

FY 2022

Invoice in July 2021	100% Program Costs	100% Media	Total Invoice
	\$286,397	\$95,000	\$381,397

FY 2023

Invoice in July 2022	100% Program Costs	100% Media	Total Invoice
	\$256,400	\$123,600	\$380,000

FY 2024

Invoice in July 2023	100% Program Costs	100% Media	Total Invoice
	\$256,400	\$123,600	\$380,000

III. Special Provisions

The Program's preferred pricing is based on your current EAB portfolio. If you terminate or discontinue any program in your EAB portfolio during the Program Term, the Annual Program Fees will increase pursuant to a written amendment.

Opt-Out: Organization may elect to discontinue the Programs effective June 30, 2022 (the "Early Termination Date") by providing written notice of its intent to terminate the Programs no less than ninety (90) days prior to the Early Termination Date, in which case the Programs will cease on the Early Termination Date and Organization will owe a termination fee of \$100,000. If you do not provide such written notification or do not pay the termination fee on or before the Early Termination Date, the Programs will continue in accordance with the terms of this Program Order Form.

Modifications to Master Agreement

In addition, the following amendments and modification are hereby made a part of the Master Agreement:

1. Section 3 is amended and restated in its entirety as follows:

Taxes. Organization will be responsible for payment of any applicable sales, use, and other applicable taxes, including the value-added tax, and all applicable export and import fees, customs duties and similar charges (other than taxes based on EAB's income, including without limiting the foregoing, Oregon's Corporate Activity Tax), and any related penalties and interest for the grant of the Services hereunder. If Organization is tax exempt and provides EAB with a valid tax-exempt certificate issued by the relevant taxing jurisdiction, EAB will not charge Organization any taxes that Organization is not obligated to pay. Organization will make all required payments to EAB free and clear of, and without reduction for, any withholding taxes. Any such taxes imposed on payments to EAB will be Organization's sole responsibility, and Organization will, upon EAB's written request, provide EAB with official receipts issued by appropriate taxing authorities, or such other evidence as EAB may reasonably request, to establish that such taxes have been paid.

2. Section 14 is amended and restated in its entirety as follows:

Entire Agreement; Amendment. The Agreement consists only of the Order Form, these Terms, as amended, and any supplemental terms attached hereto and, once executed and delivered by the parties, supersedes in its entirety all other understandings and agreements regarding the provision of the Services. This Agreement constitutes a legal, valid, binding, and enforceable obligation of each party. In the event of an express conflict between any provision of these Terms and of an Order Form, the provision of the applicable Order Form shall control.

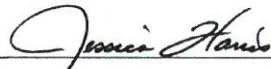
3. Section 16 is amended and restated in its entirety as follows:

Governing Law; Survival. The Agreement is governed by and construed in accordance with the laws of the State of Oregon, without regard to conflict of laws rules or the United Nations Convention on the International Sale of Goods. Each party irrevocably consents and submits to the exclusive jurisdiction of the state and federal courts situated in Polk County, Oregon, in connection with any action to enforce the provisions of the Agreement, to recover damages or other relief for breach or default under the Agreement, or otherwise arising under or by reason of the Agreement. Sections 2 through 26 of these Terms, and any provision of the Agreement that by its nature should survive, shall survive the expiration or termination of the Agreement.


This Program Order Form, together with the Master Agreement, available at <http://eab.com/terms/master>, incorporated herein by reference, form the entire agreement between the parties with respect to the Programs (and together with any other applicable agreements or supplements, the “**Agreement**”). Each of the individuals executing this Program Order Form represent and warrant that he or she is authorized to execute the Agreement on behalf of Organization or EAB, as applicable. Notwithstanding anything to the contrary in any purchase order or other document provided by Organization, any Program provided by EAB to Organization in connection with a purchase order related to this Program Order Form is conditioned upon Organization's acceptance of the Agreement. Any additional, conflicting or different terms proffered by Organization in a purchase order or otherwise shall be deemed null and void.

To initiate Organization's involvement in the Programs, please sign this Program Order Form and return it to Benjamin Roberts at BRoberts@eab.com no later than **August 27, 2021** (after which fees and terms set forth above are subject to change).

EAB Global, Inc.:

Signature: 
Name: Jessica Harris
Title: Chief Accounting Officer
Date: 8/26/2021

Western Oregon University:

Signature: 
Name: DOLYANA KARAMAN
Title: UPFA
Date: 8/27/21

Adult Learner Recruitment Scope of Services

EAB will provide the services described below on behalf of the Organization to support their goals and objectives.

A. Coordination of Services

On execution of the Agreement, EAB will assign a team led by a Strategic Leader to work with you to manage the services and establish program development and management across Organization's academic programs. The Strategic Leader will serve as Organization's primary point of contact. The Strategic Leader will work collaboratively with Organization as set forth below to assist Organization in meeting their program goals.

EAB staff is available to travel to Organization's campus as well as host Organization staff at EAB's premises, to the extent permissible by Organization's policies and procedures, to discuss the services provided under the terms of this Agreement. All associated travel costs are assumed by EAB; the Organization is not assessed any incremental fees for travel.

EAB staff will monitor and coordinate the following services along with the descriptions in the Summary of Program Services for Organization as applicable:

- Delivery of on-going marketplace assessments and trend analyses on both market research as well as market observation
- Audience recommendations for optimal results (including, as applicable, list recommendations and list order placement)
- Creation of marketing strategy and development of creative assets for the multi-channel marketing campaign
 - Delivery of customized marketing strategy based on EAB Audience Insights
 - Development and hosting of dynamic, responsive landing pages
 - Design and deployment of email campaigns in EAB's Student Journey
 - Design and deployment of digital advertisements through channels such as Facebook, Instagram, LinkedIn, and Google
 - Design, production, and deployment of printed materials
- Delivery of data-driven campaign reporting, analysis, and optimization recommendations
 - Exchange of data via secure FTP
 - On-going refinement of campaign strategy based on performance monitoring and assessments
 - Recurring, on-going reporting as well as detailed interim and final analyses
 - Use of EAB's proprietary methods and systems

B. Summary of Program Services

Marketing Strategy

- **EAB Student Journey Campaign** creation and deployment including:
 - Launch multichannel digital campaigns to build awareness including:
 - Multichannel digital campaigns including Facebook, Instagram, LinkedIn, and Google Ads display advertisements with flighting strategy aligned with Organization goals. The following advertisements will be included for the campaign duration:
 - Up to 5 simultaneous Facebook and Instagram advertisements
 - Up to 3 simultaneous LinkedIn advertisements
 - Up to 3 simultaneous Google Ads (including Gmail Sponsored Promotion)
 - 1 direct mail package per model delivered to high affinity audience prospective student population identified in the High Affinity Audience Generation above.
 - Launch multichannel campaigns to facilitate consideration and decision including:
 - Retargeting digital campaigns on Google Ads and Facebook from all EAB hosted landing pages.

- EAB will develop and host responsive landing pages to support prospect engagement with relevant institution content, inquiry form submission, and initiation of the application process for all prospect audiences, augmented by site-based digital retargeting campaigns, including:
 - Creation of application landing page to facilitate prospective student access to the application, inquiry generation, and further research with program information.
 - Creation of micro-survey hosted on landing page to understand student intent. Responders receive customized email response.
 - Creation of content give deployed through gated landing page to promote program information and engage prospective students. Responders receive an SMS message in addition to email response.
 - Creation of inquiry generation and facilitate further research with program information.
- Creation and deployment of monthly newsletter, as applicable.
- Up to 3 versions of direct mail package including personalized letter delivered to prospective student identified in Prospective Student Identification above.
- Responsive email campaigns:
 - Welcome campaign including up to 5 emails.
 - Nurture campaign including up to 10 emails.
 - Application campaign including up to 10 emails.
 - Up to 1 behavior-based trigger email to most engaged prospects.
 - Deadline campaign including up to 6 emails for up to 3 deadlines across the year.
 - Up to 8 additional emails triggered by key interactions or campaign events
- Utilizing dynamic content based on student data.
 - 4 customized content copy versions for welcome email based on lead source.
 - 10 customized content copy versions for micro-survey response email based on survey response.
- Services include the development, hosting, management and analysis of Organization’s online web application. All students who select the apply link will be directed seamlessly to the EAB-hosted Organization application.
 - EAB-hosted custom application features a perfectly rendered application for smartphones, tablets, and desktop web browsers, allowing students to navigate and submit their application using their preferred method.
 - Data will be sent on a daily basis for direct download in a pre-established and tested format.
 - SMS campaign to drive application completion.

Paid Search

- Paid Search:

EAB will manage Paid Search Ad Words campaigns, which includes analyzing the campaigns, creating ads, and reviewing the budget ensuring it’s utilized efficiently. EAB will also provide regular campaign reporting and analyses.

C. Delivery of Data-Driven Campaign Reporting, Analysis, and Optimization Recommendations

- Partner Portal: 24/7 on-demand access to your campaign performance data by segment right from your desktop or device, enabling you to filter key performance data by demographic, providing detailed insights into campaign performance by segment. The portal also allows you to share campaign performance data with stakeholders on campus to inform strategic conversations and spark action. KPIs are tracked to optimize recruitment strategy and provide ultimate transparency and reporting on marketing investments.
- Campaign Performance Monitoring: Ongoing evaluation of email deliverability, email open data, testing of email response preferences, and on-going associated adjustments, as well as coordination with digital marketing and in-home paper delivery, will allow for maximum campaign adjustments and performance. Digital marketing campaigns include ongoing monitoring across channels and campaigns to identify opportunities for optimization and reallocation of marketing spend. Using best

available data from the Organization, EAB will collaborate with the Organization to analyze and report on the campaign contribution on enrollment outcomes.

- If an application is developed and hosted by EAB, then during the term of this Agreement, Organization may access MyAnalytics™, EAB’s Organization-only website for program reporting and analysis for the application process as part of the Student Journey.

D. Social Media Accounts

Organization agrees to establish the following social media accounts as soon as practicable following the Program Term(s) and to grant EAB agency access to each such account as set forth below (each, a “**Social Media Account**” and collectively, the “**Social Media Accounts**”):

Channel or Platform	EAB Access Requirements
Facebook	<ul style="list-style-type: none"> • Assign EAB as a Facebook Page Admin • Add EAB as a Partner and grant Leads Access Permissions for direct access inquiries generated from Facebook Lead Form ads
LinkedIn	<ul style="list-style-type: none"> • Assign EAB as a LinkedIn Page Admin • Grant EAB “Sponsored Content Poster” and “Lead Gen forms Manager” permissions to create ads and to access inquiries generated from LinkedIn Lead Form ads
Google Analytics	<ul style="list-style-type: none"> • Provide EAB with “Read & Analyze” access to your .edu Google Analytics account (the property level) to provide insight into campaign analysis and performance
Other social media accounts as mutually agreed upon by the Parties	<ul style="list-style-type: none"> • As mutually agreed upon by the parties

* Facebook Business Manager is a platform that enables Organization and EAB to integrate Facebook marketing efforts. With Business Manager, Organization may run and track advertisements, manage assets such as your Facebook Pages, and add EAB to help manage your advertising campaign.

** LinkedIn Campaign Manager is a platform to access Organization’s advertising account and manage Organization’s campaigns.

*** Google Tag Manager is a tool to manage analytics and advertising tools in your apps without having to rebuild and resubmit the applications' binaries to the app marketplaces.

For the avoidance of doubt, EAB shall have advertising access to each Social Media Account but shall not be responsible for posting content organically to any Social Media Account.

Organization agrees that EAB may add the following pixels to Organization’s applicable landing pages: 1. Facebook Pixel; 2. LinkedIn Insight Tag; 3. Google Ads Remarketing. EAB may utilize the Pixels solely to provide the Services, including, but not limited to, measuring inquiry form submission and/or application submission.

E. Data & Technical Specifications

General Requirements: In order to provide Organization with the services outlined above in a timely and accurate manner, Organization agrees to complete the following requirements related to data exchange by the specified dates or milestones.

- Identify a Data Lead(s) and participate in Data Planning Call(s) within one (1) week of the execution of the Program Order Form

- Provide comprehensive and valid data files as outlined below on or before a date agreed upon in the Data Planning Call(s)
- Coordinate with EAB to ensure that the entering class data are reliable and valid. EAB will provide report iteration(s) for Organization to validate against their source systems
- Automate current entering class data feeds at EAB-requested frequency by the end of the data implementation

In the event Organization does not provide the above requirements within the period specified, EAB may assess a delay in Student Journey Campaign deployment.

Program Data Requirements: Pursuant to the timeline above, Organization will transmit valid data files from the below source systems to EAB’s secure data center that correspond to the applicable Program(s) provided herein.

Program	Source Systems	Details
Student Journey Campaign	SIS, ERP, and/or CRM	One-time delivery of historical entering class data (up to 5 finalized years) and ongoing data feeds of current entering class data

Data Integration Services

EAB’s Data Integration Services are a set of highly recommended yet optional delivery services provided at no additional cost to generate necessary Organization data from Organization’s SIS, ERP or CRM to implement the Program(s) outlined herein. This service is available for the following source systems: Ellucian Banner, Campus-Vue, Peoplesoft, PowerCampus, Slate, Target X (includes Jenzabar JRM), Jenzabar CX, Jenzabar EX, CAMS, Hobsons Connect, Ellucian Colleague on SQL Server (not Unidata), and Campus-hosted or Cloud-hosted Ellucian Recruit/Recruiter (required connection to established backend database). If you have a different source system, EAB will conduct a feasibility assessment to determine if EAB can provide Data Integration Services for that system. EAB is not in any case responsible for third-party licensing fees to extract or integrate data from the above source systems as part of the Data Integration Services or any subsequent data integration or extraction work from any data source, even if provided as part of the Data Integration Services described below.

- *Implementation Support* – If applicable, in providing the Data Integration Services, EAB will, where possible:
 - Outline source data fields required for implementation of Program(s) in consultation with EAB staff and Organization subject matter experts;
 - Create SQL queries to extract data or code in the Query Environment specified above to output data files for implementation of the Program(s);
 - Develop query logic and/or code to generate regular updates of the output data files on a frequency needed by the Program(s); and
 - Work with Organization’s staff to integrate the Data Integration Services queries or code into the production environment.
- *Institution Support Requirements* – If applicable, EAB will provide Organization with the Data Integration Services at no additional cost. Shortly after executing the Agreement, Organization and an assigned team of EAB employees will participate in a “Technical Planning Call” to discuss the project implementation and utilization of the Data Integration Services and will provide a project implementation plan. Organization is required to provide access to the applications named above within two (2) weeks of the Technical Planning Call.
- *Data Access Permissions* – Organization will coordinate the delivery to EAB of any and all confidentiality agreements, data use agreements, or similar agreements required by Organization’s source system vendor(s) in order to permit EAB access to interact with Organization’s source system(s) and deliver appropriate data feeds to EAB. All such documentation shall be delivered to EAB two (2) weeks after the Technical Planning Call.

Professional & Adult Education Forum

Scope of Services

The Professional & Adult Education Forum addresses the strategic challenges related to designing, positioning and delivering flexible, innovative educational offerings to working adult and online students. The Professional & Adult Education Forum equips continuing, professional, and online education executives with unparalleled access to real-time employer demand data and actionable market research to inform strategic growth paired with implementation tools and resources to execute against marketing, recruiting, and student service priorities.

A. Program Services:

- Strategic Leader—A EAB staff member who will serve as primary point of contact and will facilitate service utilization and dissemination of the Forum services and resources outlined below.
- Annual Professional & Adult Education Executive Roundtables—One full-day or two half-day sessions designed for Forum staff to present the major research findings from the year and facilitate discussion amongst senior continuing, professional, and online education executives on how to introduce these ideas to their own organizations. Held several times throughout the year, often in multiple locations.
- Annual Marketing & Recruiting Leader Intensives— Full-day working sessions designed for Forum staff to present the major research findings from the year and facilitate discussion among marketing and recruiting professionals from Organization facilities.
- Annual Webinar Series—Short web-based educational intensives facilitated by Forum staff to provide discussion and implementation support on Forum research, without the burden of travel. Webinars are open to all Organization employees. Organization may also request to have Forum staff deliver “private-label” webinar for their employees.
- Best Practice Research—Comprehensive studies containing detailed profiles of dozens of innovative practices and strategies, implementation road maps, and advice. Organization employees have unlimited access to all Forum best practice research, available in multiple formats.
- Diagnostic and Implementation Resources—An assortment of tools and resources that allow organizations to assess their own performance gaps, identify target areas for improvement, and support installation of best practices identified through Forum research. Examples include, but are not limited to, worksheets, case profiles, corresponding benchmarks and discussion guides.
- Summary Briefs—Condensed versions of research studies meant for broad distribution to key leadership constituencies at Organization facilities. Organization employees have unlimited access to briefs, available in multiple formats.
- Market Insights—Organization employees may request customized on-demand market demand briefs and real-time employer demand analytics. These briefs may focus on Market Opportunity Scans, Portfolio Health Checks, Program Feasibility Studies, and/or a 360 Program Assessment – at the Organization’s choosing. Organization employees will also have unlimited access to existing library of reports, State and Regional Labor Market Demand Profiles, and Program Planning Tools. Organization may request custom cuts of labor market data across the Program Term. EAB requires in most instances that Organization allow us to complete an analysis before assigning the next.
- Organizational Benchmarking and Strategy Consults—Peer benchmarking and custom analysis to inform governance, policy, and Professional & Adult Education organizational design. Organization may request unlimited customized cuts of the data to inform strategic planning, budget requests, or organizational design conversations.
- Access to Our Experts—Forum research staff is available for telephone consultations to discuss Forum research, providing hands-on support for diagnosis, implementation and troubleshooting. Staff time is subject to availability during EAB’s regular business hours at no additional cost.
- Ask EAB—Organization can access a dedicated team of EAB content specialists who respond to institution-specific research questions, leveraging a combination of existing EAB research and external research sources.

- On-Campus Intensive—Up to once each Program Year, a Forum staff member is available to travel an Organization facility to present Forum research or facilitate discussion on a related topic or terrain to the employee group of Organization’s choosing.
- EAB Online Research Portal—Dedicated website (www.eab.com) for Organization employees providing full online access to all Forum research and implementation resources. Through the website, Organization employees may subscribe to EAB’s “Daily Briefing” and Forum newsletter(s).

B. Organization Responsibilities

Organization agrees to:

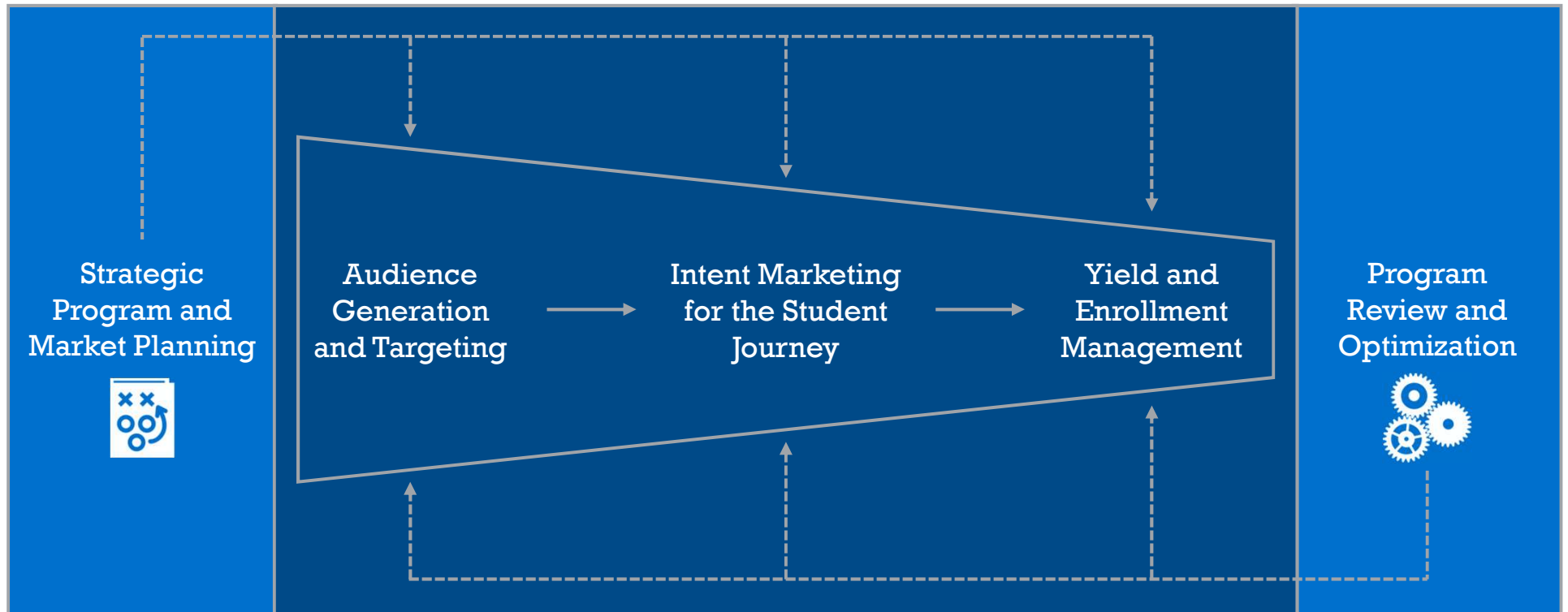
- Schedule and hold a “Welcome Call” with key campus leadership and EAB’s Strategic Leader within the first 60 days of the Program Term to discuss top institutional priorities and the Forum service plan.
- Schedule an “Annual Organization Planning Session” with key campus leaders in each subsequent year to discuss updates to institutional priorities and the Forum service plan.
- Provide Strategic Leader and senior EAB research staff access to strategic plans, initiatives, working groups, and other information upon request to help inform service plan and enable service delivery, including completion of the “Professional & Adult Education Organizational Benchmarking” survey.
- Arrange for campus leader to attend at least one (1) Executive Roundtable or Leadership Summit each Year (contingent on staff availability and travel budget).



Beginning Your
Adult Learner Recruitment
Membership

The Smart Growth Solution for the Adult Learner Market

Our **strategic enrollment solution** combines consumer analytics, intent marketing, and strategic services.



DATA & CONSUMER ANALYTICS AT SCALE

1.5B+

Student interactions analyzed annually

100+

Data and analytics experts on staff

500+

Field marketing tests performed annually

Our Partnership Model

How Our Team Supports Your Adult Learner Success



Full Campaign Management

- Identify and recommend strategic changes to your program portfolio*
- Develop a true understanding of your goals, voice, and brand
- Own all aspects of campaign development and deployment, while still allowing you full creative control
- Process all data related to campaign deployments
- Allow your team to focus their time on connecting with students



Strategy Support

- Dedicated Strategic Lead available to you at any time, day or night
- Ongoing collaboration throughout each step of the cycle
- Regularly scheduled calls
- Planning session(s) hosted by EAB or on your campus
- On-demand access to campaign performance



Continuous Refinement

- Regular and ad hoc data analysis to monitor campaign performance
- Continuous review of email deliverability
- Flexible campaigns allow for in-campaign modifications as necessary
- EAB team will do whatever it takes to help you meet your objectives



We have had short-term relationships with a number of different consulting groups and the reason we stopped working with them was they would not do what EAB does: learn us, take the time to know what we do well enough to deliver a strategy or insight in a way that resonates and does not feel like they are taking it off the shelf. **For the first time in my 30 year career, I feel like what we have here is truly consultative.**

**Strategic Program and Market Planning services are an optional enhancement.*

Assembling Your Team



Project Lead (1-3)

Sample Titles:

- Graduate and Adult Enrollment Leaders
- Dean of Graduate Program(s)
- Marketing Leaders
- Undergraduate Degree Completion Owners

Key Responsibilities

- Primary point(s) of contact between institution and EAB team
- Involved in project planning and oversight of day-to-day operations, including creative reviews and campaign performance updates

Estimated Commitment

- *Initial launch:* 8 hours
- *Ongoing:* 2-4 hours per month



Executive Sponsor (1)

Sample Titles

- President
- Provost
- Chief Innovation Officer
- Chief Marketing Officer
- VP/Dean of Graduate Enrollment

Key Responsibilities

- Overall program and organizational champion
- Ensures support for initiative and holds team accountable

Estimated Commitment

- 1 hour per month



IT Team (1)

Sample Titles

- Director of University Admissions Operations
- Associate Director of Admissions
- Director of Information Systems

Key Responsibilities

- Coordinates with EAB data team on initial infrastructure
- Supports ongoing data transfer

Estimated Commitment

- *Initial set up:* 8-10 hours
- *Ongoing:* 1 hour per month as needed



Influencers (Many)

Sample Titles

- Admissions Team
- Marketing Team
- Digital Team
- Deans

Key Responsibilities

- Provide input about goals and strategy periodically
- Review campaign content

Estimated Commitment

- *Initial launch:* 8 hours
- *Ongoing:* Less than 1 hour per month¹

1) While a small time commitment is anticipated for this group, the EAB partnership typically frees up capacity previously spent on recruitment implementation, giving them time back overall.

How We Work With Your Organization

Our Enrollment and Execution Experts Help You Accomplish More While Reducing the Burden on Your Staff

Our Team

Your Key Points of Contact



Strategic Leader

- Our expert on your institution
- Maps your needs to our offering
- Advises you on strategy



Account Manager

- Your day-to-day point of contact
- Oversees execution
- Quarterbacks EAB teams



A Team of Experts Backing Your Success



Client Data Steward

- Dedicated liaison for your data staff
- Supports collection of historical data
- Optimizes data transfer processes



Data Scientist

- Expertise in machine learning
- Develops your custom audience models
- Identifies your high-affinity audiences



Strategic Analyst

- Tracks your campaign performance
- Performs custom analyses
- Informs your strategy



Targeting Analyst

- Industry-leading list expertise
- Translates your aims into list strategy
- Oversees all technical list work



Copywriter

- Develops governing campaign themes
- A communications best-practice expert
- Your brand steward within EAB



Art Director

- Leverages your legacy branding
- Ensures strong visual differentiation
- Ensures consistency across all media



Web Designer

- Expert in responsive web design
- Builds user-friendly web pages
- Optimizes content for conversions



Senior Director of Marketing Strategy

- Expertise in adult learner marketing
- Drives marketing innovation
- Leads testing and learning agenda



Digital Marketer

- Develops digital marketing campaigns
- Manages digital campaign launches
- Tests new ways to optimize performance



Project Manager

- Oversees campaign creation and launch
- Ensures coordinated, prompt delivery
- Optimizes team workflows



Subject Matter Experts

- Deep focus on key content areas
- "Sage counsel" at your service
- Includes student segment experts



Enrollment Planning Consultant

- Extensive real-world experience
- Performs competitive analyses
- Advises on strategic program planning

Kicking Off Your Partnership

A series of development calls serve as the formal kickoff for your ALR membership. You will connect with key members of the EAB team and work together to determine goals, timelines, roles, and expectations for data intake, implementation, and creative assets.

Upcoming Planning Calls

First 2 weeks (ideal)



Welcome Call

Executive Sponsor and Project Lead

During this call, your IT team and project leads will connect with EAB to review the technical specifications guide to initiate data intake and implementation.



IT and Data Intake Call

Your Client IT Team and Project Leads

During this call, your IT team and project leads will connect with EAB to review the technical specifications guide to initiate data intake and implementation.



Program Call

Your Admissions Team

During this call, our team will get to know your enrollment goals, academic calendars, historic strengths/weaknesses, competitors, and other relevant considerations.



Brand & Marketing Review Call

Your Marketing Team

During this call, we will seek to understand your voice, tone, and brand vision, and discuss the scope/depth of existing marketing efforts and digital media budget allocation.



Digital Marketing Call

Your Digital Team

We will strive to understand current digital marketing initiatives, media spend, channels, historical outcomes, and goals.

Recurring Call Series

Onboarding and Development Updates

30 minutes bi-weekly

Discuss implementation status and campaign development updates with your EAB Strategic Leader and team.

IT and Data

30 minutes (as needed)

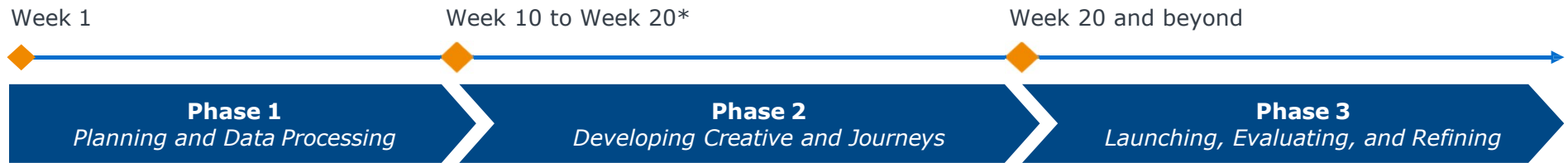
Review progress and needs related to data intake and modeling (likely to be more frequent during initial onboarding and bi-weekly once data is received in a viable format).

Weekly Campaign Strategy Calls

30 minutes weekly

Walk through campaign timing, status, and performance as well as any calibration and optimization recommendations.

Overall Implementation Timeline



Representative Activities:

- Welcome call with your ALR team
- Onboarding calls with your creative team
- Receipt of brand assets & publications
- Data file delivered
- Agency access to your social media and display ad accounts
- Check-in calls to discuss road blocks and progress
- Sign off on domain names

Milestones:

- Data approved
- Affinity audience generation

Representative Activities:

- Creative assets are built for each stage of the student journey
- Share model insights with your team
- Discuss audience targeting recommendations including high affinity, digital, and purchased names
- Webinar to review creative strategy within the journey and walk through components for sign off
- Sign off on creative assets such as display ads, landing pages, and email

Milestones:

- Sign off on all creative assets needed to launch initial Student Journey stages
- Sign off on targeting recommendations for audience development

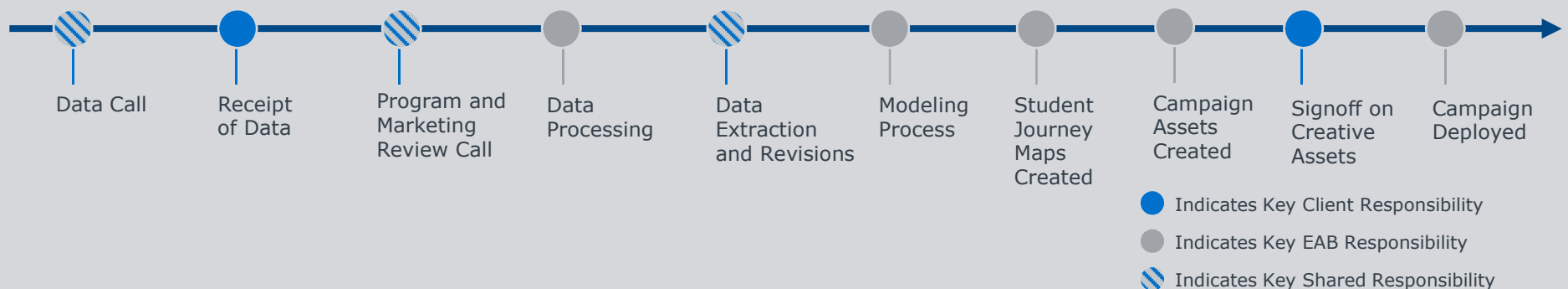
Representative Activities:

- Share campaign performance
- Review and sign off on refreshed display ads
- Discuss additional campaign assets as needed in the campaign
- Review any tests in the field and assess impact on performance
- Check-in calls to review campaign performance
- Analyze yield survey results

Milestones:

- Performance dashboard shared

Partnership Launch Milestones



*Dependent on each client's goals and timeline

Overall Implementation Timeline with Strategic Program Planning



Strategic Program and Market Planning

Complete by Week 8-24*



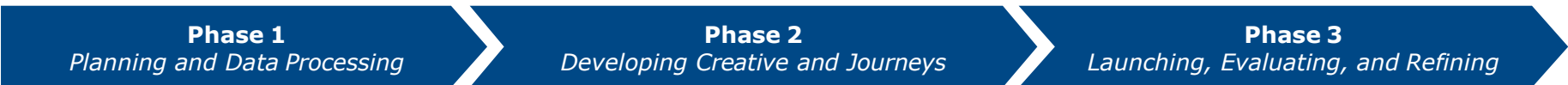
Activities and Milestones:

- Conduct introductory call to discuss goals and gather contextual information that will inform analyses and recommendations
- Complete competitor and program demand analyses
- Deliver recommendations on new programs, programmatic changes, and prioritization of existing programs

Activities and Milestones:

- Operationalize the results of your program analyses
- Host academic and operational efficiency workshops to enhance strategic planning

Audience Generation, Campaign Launch, and Refinement



Representative Activities:

- Welcome call with your ALR team
- Onboarding calls with your creative team
- Receipt of brand assets & publications
- Data file delivered
- Agency access to your social media and ad accounts
- Check-in calls to discuss obstacles and progress
- Sign off on domain names

Milestones:

- Data approved
- Affinity audience generation

Representative Activities:

- Creative assets are built for each stage of the student journey
- Share model insights with your team
- Discuss audience targeting recommendations including high affinity, digital, and purchased names
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Milestones:

- Performance dashboard shared

*Dependent on each client's goals and timeline

Strategic Program and Market Planning

Advisory Services Ensure You Are Making Informed Choices About Program Prioritization, Modality, and Design

Complete by Week 8-24

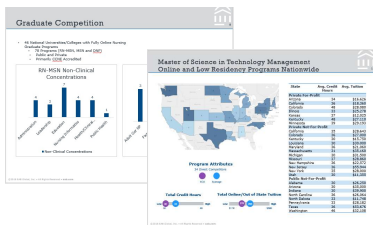
Strategic Programmatic Planning

Implementation Workshops

Review, Evaluation, and Refinement

Competitor Analysis Report

Using a **proprietary dataset** along with national labor and education data, EAB examines how your programs compare to those of your competitors. In addition to determining general demand, we analyze key program factors including admissions requirements, tuition per credit hour, number of credits, and concentrations

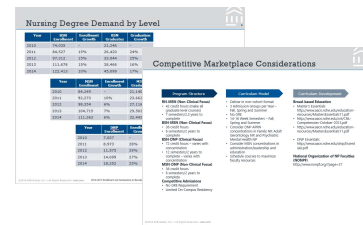


Outcomes

- ✓ Identify highest potential current programs
- ✓ Pinpoint key positive differentiators to highlight in marketing messaging

Future Program Recommendations

EAB determines **market demand** for potential new programs based on national labor and education data. These recommendations are driven by your school's enrollment priorities and internal capacities.

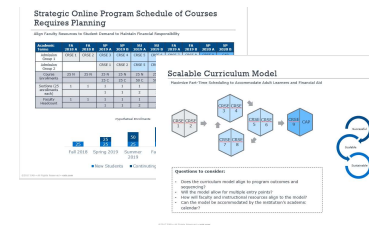


Outcomes

- ✓ Find promising new programs that align with institutional priorities
- ✓ Propose market-savvy plans for new programs

Academic Workshops

We conduct one or more on-site workshops to operationalize the results of your program analyses. We help you develop plans related to **program structure, faculty resources, and academic costs** to maximize program growth and design offerings that perform well in a highly competitive market.

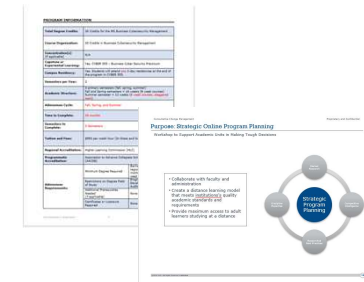


Outcomes

- ✓ Select existing programs to prioritize for marketing
- ✓ Design growth-optimized program structures
- ✓ Align proposed programs with academic resources

Operational Efficiency Workshop

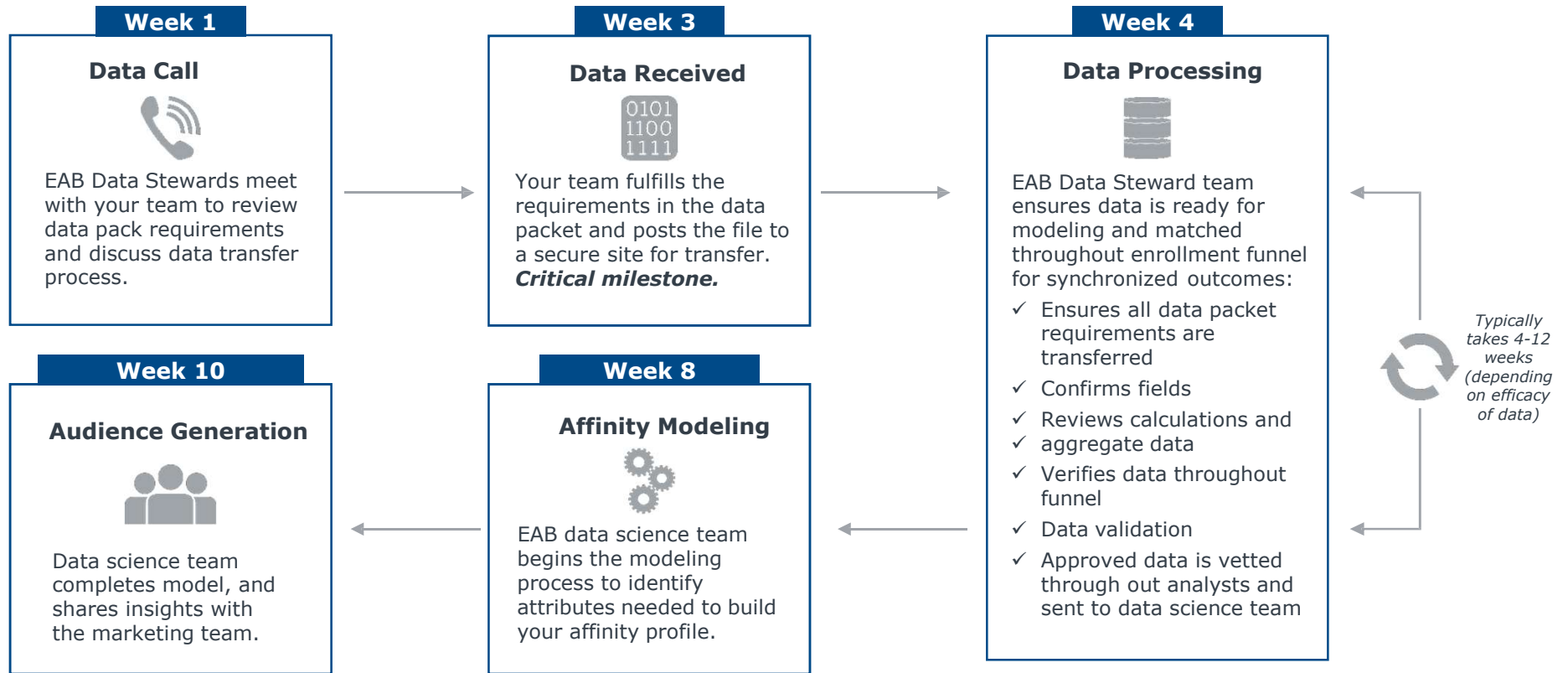
EAB conducts a workshop covering internal processes such as transfer of credit, admissions, student support, recruitment, and instructional design to **enhance strategic planning**.



Outcomes

- ✓ Optimize implementation of program plans to ensure success once proposed changes are in place

Phase 1a: Data Modeling Process and Requirements



Minimum of 1,400 historical student records required to develop an affinity model for an individual field of study

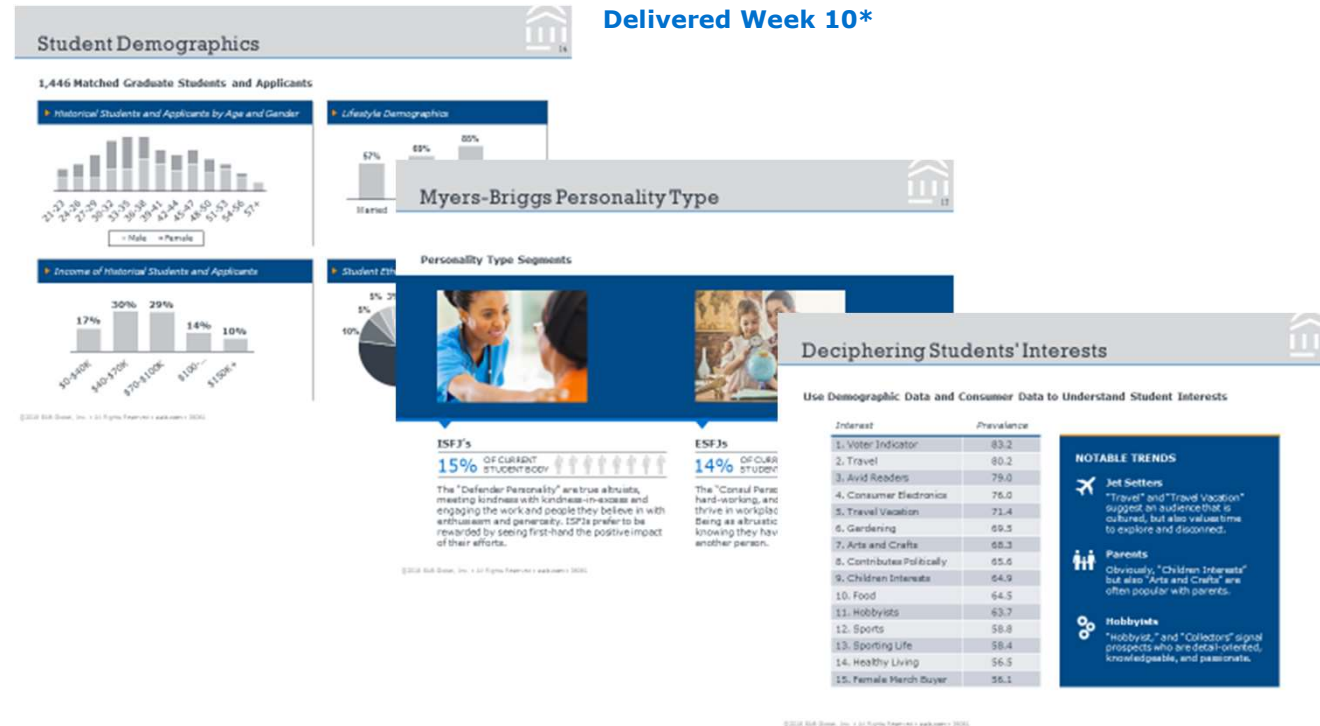
- Historical records should consist of all completed applications for a given field of study
- Records should be gathered from the past five years
- Majority of historical records should consist of domestic applicants age 25 and older

To develop affinity models, the following data fields are required for each student record:

- Full Name (first, middle, last)
- Address (street, city, state, zip)
- Email Address
- Gender
- Date of Birth
- Student Type (undergrad vs. grad)
- Degree
- Program
- Application Submission Status and Date
- Admit Status and Date
- Enrollment Status, Date, and Term
- Unique Student ID (via client source system)

Phase 1b: Data-Driven Affinity Profile

We Combine Your Historical Data With 112 Known Consumer Variables From Our Database to Generate a Detailed, Actionable Profile of Your Student Body.



Demographic Profile

- Income distribution
- Marital and parental status
- Current occupation
- Home ownership



Personality Indicators

- Myers-Briggs classification
- Values and lifestyle
- Cultural and generational characteristics



Affinity-Modeling Outcomes

- Influential interests
- Broader population comparisons
- Ranking and prioritization

Leverage Your Affinity Profile to...



Generate Audience List

Identify and locate high-affinity, high-potential prospects for campaign outreach. *Data model also drives test-taker and digital targeting.*



Construct Student Marketing Personas

Isolate the consumer variables that best characterize your high-affinity prospects

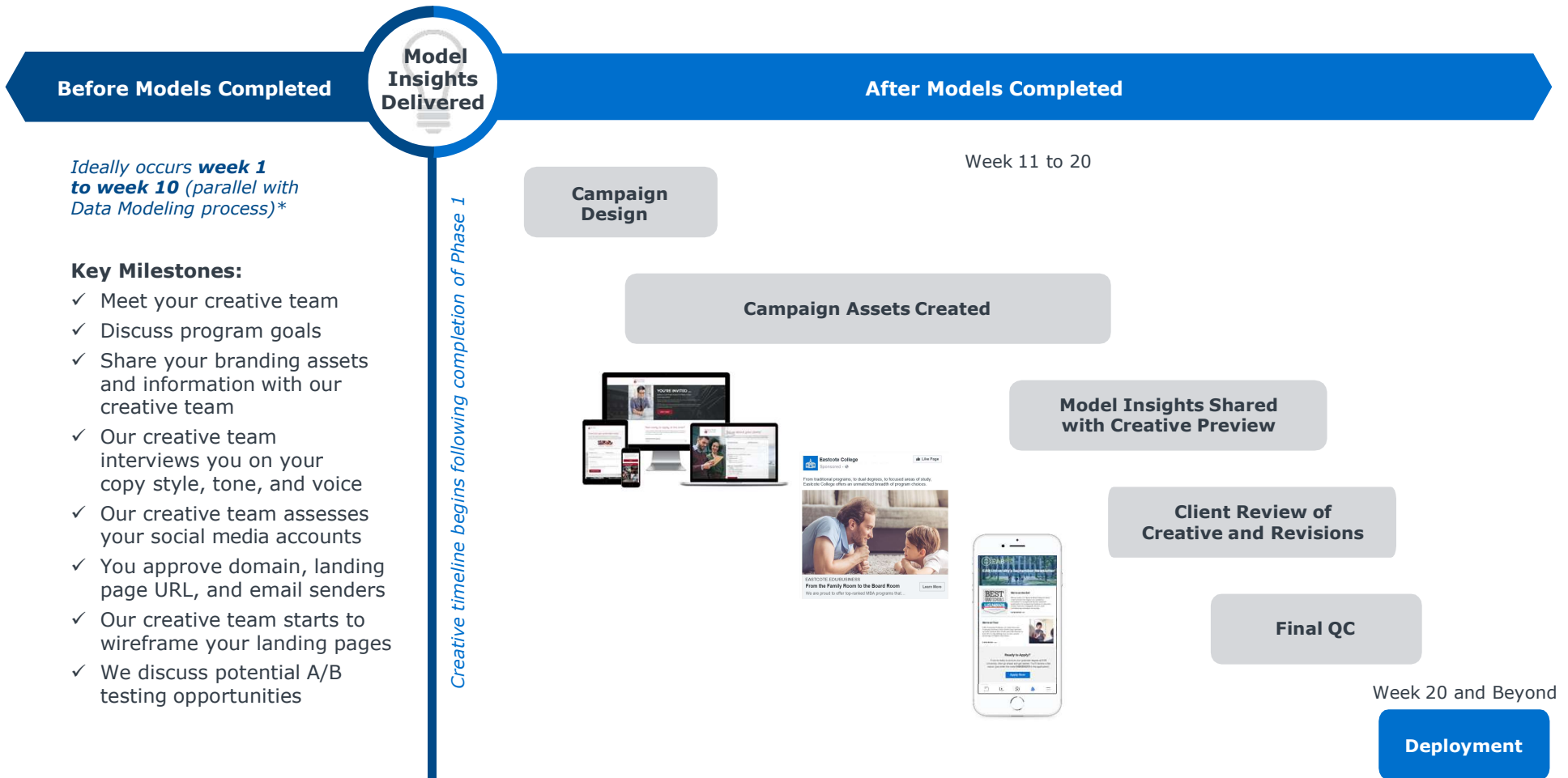


Reveal Insights to Drive Intent Marketing Strategy

Use affinity-modeling insights to inform campaign messaging and imagery selection in the awareness stage of your student journey

*Affinity profiles are delivered approximately 10 weeks after we receive a client data file that can be processed for modelling.

Phase 2: Creative Design and Development



*Timeline based on 1-2 intent-driven marketing campaigns, exact timing subject to various factors.

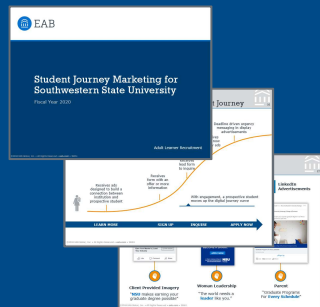
Creation of Customized Student Journey Strategy

We Craft a Multichannel Strategy to Engage Your Prospects Based on Intent

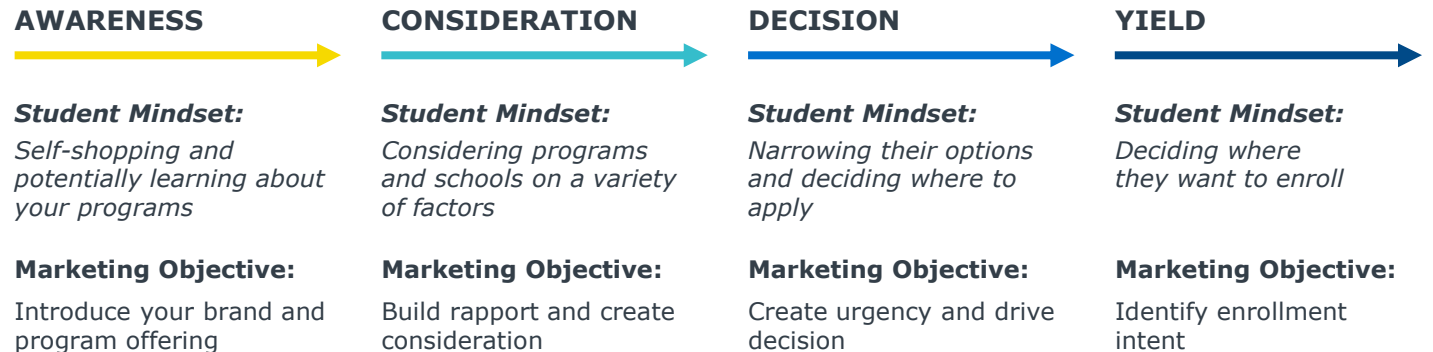
Your Strategy Overview Includes In-Depth Campaign Recommendations:

- ✓ Audiences
- ✓ Campaign flows
- ✓ Timing and schedule
- ✓ Channels
- ✓ Campaign objectives
- ✓ Messaging strategy
- ✓ Imagery strategy
- ✓ Calls to action
- ✓ Suggested A/B tests

Strategy Overview Delivered Week 12*

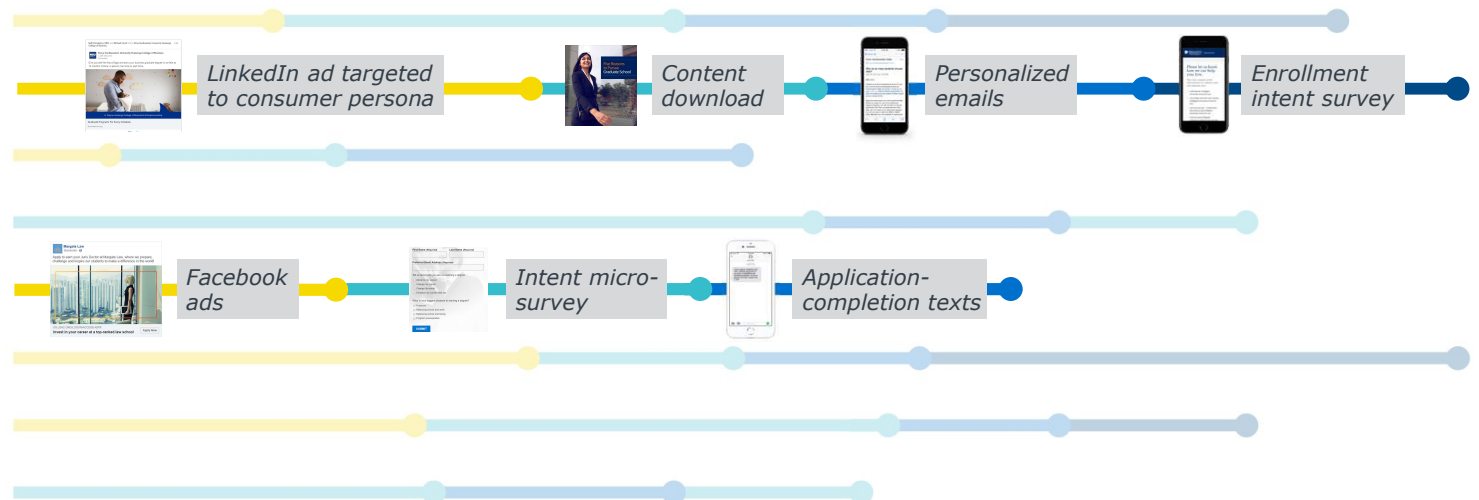


Recommendations Shape a Strategy for Engaging Prospects at Each Journey Stage



Behavioral-Based Campaign Flows Enable Unique and Highly Personalized Journeys

How Sample Campaign Elements Map to Individual Student Journeys



*Dependent on each client's goals and timeline

Phase 3: Ongoing Evaluation and Refinement

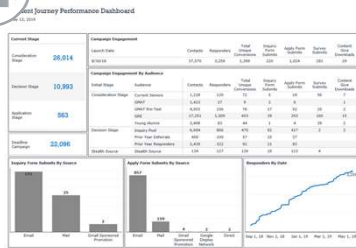
Your Partnership Includes Comprehensive Monitoring and Reporting Services to Evaluate Campaign Progress, Fine-tune Campaign Performance, and Demonstrate Return on Campaign Investments.

Bi-Weekly

Monthly

Annually

Student Journey Performance Report



- Understand email campaign engagement and inquiry generation
- Track contacts, responders, inquiries, and form submissions (including 4 unique forms)
- Analyze by stage, audience, date and source
- View summary of survey responses

Digital Marketing Performance Report



- Understand digital campaign engagement
- Track impressions, clicks, spend, CPM, CPC, CTR, and leads
- Analyze by network, stage, ad type, and date

Client Data Impact Report



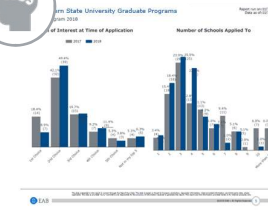
- Understand the impact of EAB campaigns on your enrollment funnel
- Track applications, admits, and enrollments
- Analyze by audience, campaign engagement, and date

Client Onsite Presentation



- Your Strategic Leader will provide comprehensive analyses of campaign and funnel performance along with strategic recommendations

Yield Survey Analysis



- Understand key findings from a survey of your non-yielding admits
- Gain competitive insights

Ongoing Monitoring of Digital Marketing Performance



KPIs are benchmarked against EAB averages, institutional cohort averages, and industry-wide benchmarks.

Sample KPIs:

- Campaign Response Rate
- Click-through Rate
- Impressions
- Total EAB Inquiries
- Application Conversion Rate



Sample Course-Corrections:

- Optimizing Digital Ad Placement
- Optimizing Digital Spend
- Emphasizing High Performing CTAs
- Evaluating Copy & Imagery
- New Ads
- New Audiences
- Ad-hoc Email Sends
- Email Subject Line Testing

Change Management Support Every Step of the Way

It's no coincidence that we refer to the colleges and universities we work with as our "partners." The relationship is a deeply collaborative one, based on close, ongoing coordination between our team and yours. One benefit of this collaborative approach is our unique ability to ensure that all key stakeholders at your institution are fully in the loop—that we're effectively tapping their expertise, educating them about our methods, and demonstrating to them that their voices are being heard.

Representative Stakeholder Questions We Help Address



Admissions staff

What kind of data analytics can you provide to support us in our daily work?



Provost

How can you help grow enrollment in our undersubscribed programs?



University board

How will your work impact net tuition revenue?



Chief Business Officer

How can we be sure we're seeing a return on our recruitment investment?



IT/Data teams

Will the data and reporting infrastructure you're installing place any new demands on my team?



Marketing leadership

How are you going to integrate your creative work with our existing branding and campaigns?

How We Support Your Ability to Lead Change

Personalized VIP Days

Customized visits to the EAB offices to provide your executive team with the latest EAB research and insights and facilitate collaboration

Customized On-Site Presentations

EAB-led presentations and working sessions on your campus to provide updates and discuss strategy with all key teams within your organization

Reporting Analytics

Insight-driven reports to keep your key stakeholders informed about funnel performance, marketing engagement, and more

Survey Capabilities

National surveys addressing key issues in adult learner recruitment, including student communication preferences, enrollment priorities, and more

Adult Student Marketing Blog

Top news, strategies, and analyses from our leading experts sent straight to your inbox to keep you informed on the latest industry trends and research



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Benefits of EAB Data Automation Services

Leveraging EAB's Expertise and Experience to Extract Your Data

Data Automation Services (DAS)

EAB's data Automation services team can provide data extraction and automation services to universities that wish to reduce institutional resource expenditure, particularly those that have IT constraints that may otherwise limit participation in the EAB programs. Using our DAS team enables clients to leverage EAB's knowledge and expertise with common information systems to reduce implementation time and limit the number of project hours required from college staff.

Services Provided by EAB

- Map source system data fields to the EAB data specifications in consultation with college business process/subject matter experts
- Create extract queries or code in the agreed-upon query and scheduling environment to output data files for platform implementation
- Work with college staff to integrate DAS team queries or code into agreed-upon production environment and to automate regular updates of the data files

Support Required from Your Institution

- Remote VPN access, as mutually agreed, to the application and its network, database, and OS environment
- Availability to answer DAS programmers' questions regarding unique application configurations and customization
- Agreement on support ownership for regular execution of the automated extract queries following confirmation that the implementation project is complete

Advantages EAB's Data Automation Services

- Faster implementation
- Easier for college team
- Maintain partnership
- Reduced potential for rework

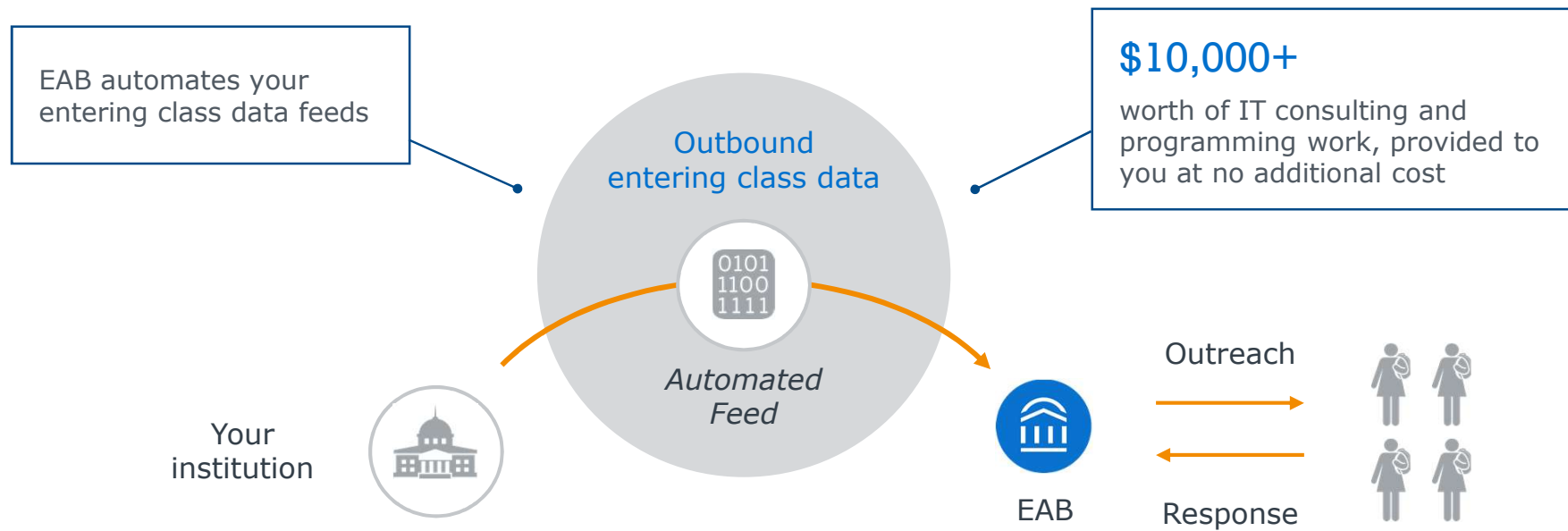
Reduced Burden on Institutional Resources

80%

Fewer hours required from client institution with EAB Data Automation Services

Overview of EAB Data Automation Services

Automating Outbound Data Flows for Enrollment Services Campaigns



DAS Access Requirements and Process

Workstation (VM) System Requirements:

- **Location:** Within client network
- **CPU:** 64-bit Intel chip
- **RAM:** +4GB (+8GB recommended)
- **HDD:** +20GB (+100GB recommended)
- **OS:** Windows Server (Multi user login - User with administrative rights)
- **Java:** Version 7 (Version 8 recommended)
- **Database Connectivity:**
 - If Oracle, then Oracle Client with configured TNS entries; a SQL client (Oracle SQL Developer, preferred)
 - If SQL Server, then SQL Server Management Studio and SQLCMD utility
- **Software:**
 - Active/Strawberry Perl
 - SFTP client (WinSCP preferred)
 - A robust text editor software (Notepad++ preferred)

