University of Montana

Online Program Management
RFP: UOM-RFP2019-3108

Offeror:
M. Wayne Parkins
Regional Vice President
Wiley Education Services

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February 6, 2019

University of Montana
Business Services–Procurement
Attn: Bob Hlynosky
Lommasson Center 236
Missoula, Montana 59812

Dear Bob,

Wiley is pleased to provide the following response to the University of Montana's Request for Proposal (RFP) for Online Program Management.

The attached response provides an overview of Wiley Education Services and our unique approach to meeting the University of Montana's needs as articulated within the solicitation. You will note that our solution is built on a framework approach that is rooted in flexibility and collaboration to best meet the needs of diverse groups and programs within the institution. Supported by top professionals with an established set of best practices, Wiley's unparalleled flexible approach to partnership, underpinned by significant technology investments, sets us apart from any other firm in your consideration set.

Wiley's experience and expertise are evidenced throughout our response in the following ways:
- Decades of proven experience delivered by a team of leading professionals supporting the entire student journey in partnership with diverse higher education institutions, including a significant number of large, public four-year institutions.
- Technology-enabled services that provide us with the ability to integrate with systems and scale.
- A dedication to shared governance to work in partnership with administrators and faculty.
- A high level of sophistication in marketing and recruitment technologies, systems, and processes.
- Demonstrated history of success with marketing, program development, student recruitment, student retention, and academic services in online learning at scale.
- Ability to articulate strategies for growth in the increasingly competitive online learning market.
- Ability to develop a strategic plan for working in partnership with a variety of needs for diverse institutions and programs at UM-Missoula and Missoula College as well as throughout the entire University, including, but not limited to: market research, institutional readiness, marketing and recruiting, academic services, and more.

We encourage you to review the attached and look forward to your feedback. After reviewing our response, I believe you will agree that we stand out as the partner of choice to support the needs expressed within your RFP. We look forward to having further conversations about how we can collaboratively tailor solutions which will advance the University of Montana's strategic vision.

Thank you for your consideration.

Regards,

M. Wayne Parkins
Regional Vice President
Wiley Education Services

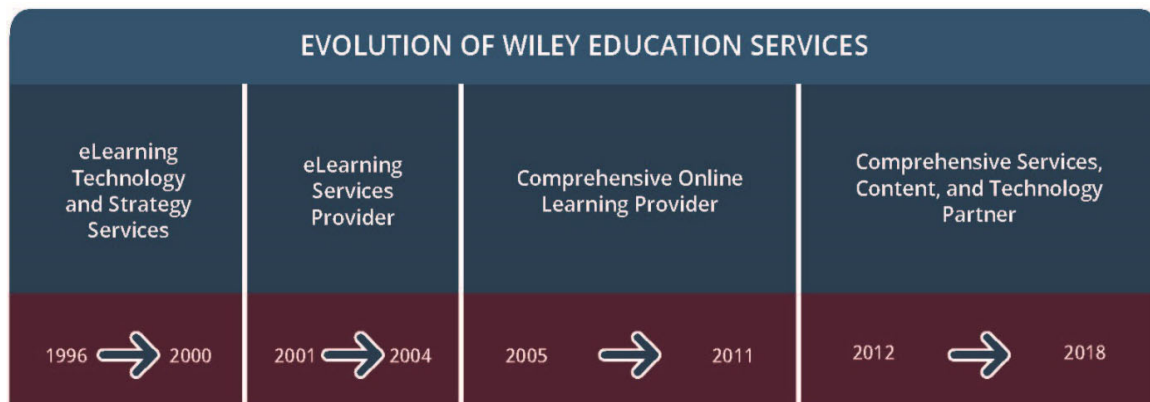WILEY | EDUCATION SERVICES

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3.0 Requirements

A. General

1. Provide information about your company to include:

    a. A brief description of your company, including history, organizational structure, names of principles, location of headquarters and other offices, number and location of employees, and types of services offered.

Response:

Company Description, History, and Organizational Structure

Wiley has been a global education leader for more than 210 years. As the higher education landscape became more diversified and competitive, Wiley recognized an opportunity to help universities better utilize services and technology to address their unique challenges. To accelerate its ability to serve customers, Wiley acquired Deltak in 2012, a leader in online higher education partnerships and technology solutions for over 20 years. This acquisition integrated Deltak's expertise with Wiley's innovative content solutions and global network, creating new opportunities to solve a broader range of challenges for institutions. 2012 marks the year in which Wiley Education Services was born. In 2018, Wiley Education Services welcomed The Learning House into our organization to strengthen our partner network and deepen our ability to address the needs of partner institutions.

Wiley Education Services is a distinct business unit within Wiley, with the success of our partner institutions as top priority. We are able to leverage the breadth and depth of expertise across the broader Wiley portfolio of technologies and services to help meet the unique needs of our partners.

EVOLUTION OF WILEY EDUCATION SERVICES

eLearning Technology and Strategy Services	eLearning Services Provider	Comprehensive Online Learning Provider	Comprehensive Services, Content, and Technology Partner
1996 ⇒ 2000	2001 ⇒ 2004	2005 ⇒ 2011	2012 ⇒ 2018

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Location

With our recent acquisition of The Learning House, we employ over 1,000 dedicated professionals in five office locations in Chicago, IL, Orlando, FL, Mount Joy, PA, Louisville, KY, and Chichester, UK, supporting over 600 programs.

Types of Services Offered

We work closely with higher education institutions to develop tailored services and technology solutions that cover the entire student journey. Wiley's insight, resources, and support allow our institutional partners to address challenges they're facing by reaching new markets, developing operational efficiencies, and creating rewarding on-campus, online, and hybrid learning experiences.

Comprehensive Portfolio of Online Program Management Services

MARKET ASSESSMENT	PROGRAM DESIGN & DEVELOPMENT	MARKETING & BRAND MANAGEMENT	RECRUITMENT	ENROLLMENT MANAGEMENT	STUDENT RETENTION SERVICES	24X7 HELPDESK
MARKET RESEARCH & ANALYSIS	PROGRAM PLANNING	FULL SERVICE AGENCY	BEHAVIORAL ANALYTICS	ENROLLMENT COORDINATION	ORIENTATION	STUDENT TECH SUPPORT
MARKET STRATEGY & INSIGHTS	INSTRUCTIONAL DESIGN	CHANNEL STRATEGY	HIGH TOUCH STUDENT ENGAGEMENT	COURSE CAPACITY PLANNING	PROACTIVE MONITORING & OUTREACH	FACULTY TECH SUPPORT
PROGRAM SELECTION	FACULTY TRAINING & SUPPORT	CREATIVE & CONTENT	TARGETED RECRUITMENT	POLICY & PROCESS ADHERENCE	"LIFELINE" FOR STUDENTS	ISSUE RESOLUTION
	ONGOING IMPROVEMENTS	ANALYTICS & REPORTING	ROI OPTIMIZATION	DATABASE & REGISTRATION MANAGEMENT		

Thanks to our unique history, we have developed a system of effective practices and a highly successful method of partner collaboration, continually evolving to meet the needs of learners, employers, and markets, regardless of modality. Today we offer experience, proven best practices, and extensive knowledge in market research, marketing, student recruitment and enrollment, retention and re-enrollment, 24x7 helpdesk support, program design and development, technology infrastructure, and faculty and student support—all of which are key to driving student success, and ultimately the success of an institution like the University of Montana.

b. If subcontractors are proposed, provide similar information for each proposed subcontractor.

Response:
Wiley Education Services does not intend to use subcontractors.

c. Include any information that may be of value to the University of Montana in evaluating your company's qualifications, including what differentiates you from other companies in this sector.

Response:
Wiley Education Services' experience and capabilities as a leader in higher education services have been further enhanced through significant investments in technologies and innovation across the portfolio of services, ultimately enabling our partners to find, recruit and retain students most likely to be successful in their programs. Through marketing intelligence, behavioral analytics, and automation, our teams consistently rely on data to inform micro and macro decision making across the partnership lifecycle.

Additional benefits of a partnership with Wiley Education Services include:

- Decades of our expertise across multiple domains blended with a proven approach.

- True passion for higher education and serving the needs of adult learners to our work.

- Dedication to helping our institutional partners achieve their potential by providing comprehensive, tailored, technology-enabled services across the entire student journey.

- Deep understanding of the needs of adult learners and higher education to help position a partner institution's unique value proposition

- Significant investments in technologies and innovation across the portfolio of services to ultimately enable our partners to find, recruit, support, and retain students most likely to be successful in their programs.

2. Provide an overview of your leadership team, including length of experience working with online academic programs for higher education.

Response:
Wiley's leadership team brings an average of 15-20 years of direct experience partnering with higher education institutions to extend their reach and impact through online program management. Please find more details about our leaders in the response to #3 below.

3. Identify staff that will be assigned to the engagement and provide vitae (up to 2 pages per person) for nominated staff including description of their roles in similar engagements. Describe explicitly their location and the means by which they will communicate and work with UM. Identify the time period that the staff will be assigned to the engagement.

Response:

All partnerships we enter into are staffed by a combination of seasoned higher-education professionals. Wiley's rigorous hiring process focuses on culture and the highest value for education first. We attribute our exceptional retention rates to extensive screening, hiring, and onboarding processes that focuses on the core tenets of our values. We only hire those who think and operate like owners and hold the highest level of personal and professional ethics. Pride in both the Wiley organization as well as pride in our partner organizations is a core value that is paramount for each of our team members.

The following is an example of various staff roles that would support a potential relationship with Wiley.

- **Partnership Director:** The Partnership Director serves as the general manager and manages the relationship between your institution and Wiley.
- **Operations Manager:** The Operations Manager acts as the liaison between partner contacts, students, and internal Wiley departments with the goal of providing superior student and partner support.
- **Student Services Coordinator:** The Student Services Coordinator provides ongoing support for the student throughout the time the student is enrolled in a program.
- **Enrollment Coordinator:** The Enrollment Coordinator works with prospective students to secure the necessary documentation required for their application submission.
- **Director of Admissions:** The Director of Admissions manages the student recruitment team and the community/corporate relationship efforts.
- **Program Manager:** Our student recruiters are called Program Managers.
- **Brand Manager:** The Brand Manager has ultimate responsibility for developing and executing the strategic marketing plan and acts as the liaison between the marketing channel leaders.
- **Program Development Manager:** The academic services team that is assigned to each partner is led by a Program Development Manager.
- **Instructional Designer:** The Instructional Designer works with the faculty and Program Development Manager to execute the design plans and will also work closely with your SMEs.
- **Learning Technologist:** The Learning Technologist assists the Instructional Designer and faculty in building and maintaining online courses.
- **Product Manager:** The Product Manager oversees the relationship with the Personal Support Center (PSC).

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How Our Staff Will Communicate and Work with UM

The success of our partnerships is based on tight collaboration and coordination of the various constituents within both Wiley Education Services and our partner institutions, some of which occurs in person, especially during the start-up and launch phases. This collaboration includes a series of campus visits and meetings with administrative and faculty stakeholders to truly understand each other's groups, processes and culture. We are dedicated to collaborating in person to support the partnership as needed. In addition, our teams across the enterprise are dedicated to meeting partner needs on an ongoing basis.

Biographies

The following biographies provide a sampling of the experience and credentials of the professionals that may direct the main operations of the University of Montana team. Once we finalize the agreement, we will re-evaluate the support required and make any adjustments to personnel in order to provide the required level of support. Afterward, the Wiley Education Services would welcome the opportunity to come to campus and meet with the University of Montana team.

Matthew Hillman, President

Matt Hillman is a senior leader of Wiley Education Services and is based out of the Orlando office. Matt oversees all of the services for the company previously known as Deltak. He has been with the organization since 2003 and has held a variety of partner-facing roles and was most recently promoted after leading the company's entire operations as Vice President of National Operations. Prior to Wiley, Matt served in sales positions at Sylvan Learning Systems' Online Higher Education Division (now Laureate Education) and UMUC OnLine, Inc., a startup company at the University of Maryland University College. He has worked in higher education for over 15 years. Before entering the online education market, Matt spent two years working in student affairs at Franklin and Marshall College. He has a BA in philosophy from Albright College.

Jeremy Parker, Vice President of Partnership Operations

Jeremy is responsible for the oversight and management of large accounts at Wiley Education Services; heading the unit that offers tailored solutions to new and current partners; and serving on the leadership team.

Before he joined Wiley Education Services, Jeremy oversaw daily operations for university centers at several DeVry University locations in Florida. In the 10 years that he has been at Wiley, Jeremy has developed considerable expertise about the industry—something that he sees mirrored in other team members, who together

create a knowledge base that is a significant advantage for partners. "We have a good sense of what will happen as schools venture online, both on the academic side and with the business offices," he says. "We understand the change that this brings to the schools and can help them prepare for it and navigate through it. We understand there is more value in doing it correctly than in doing it quickly. We will not compromise quality for speed."

Jeremy has a Bachelor of Science in Business Administration from the University of Central Florida and an MBA from the Keller Graduate School of Management.

David Migliorese, Vice President of Academic Services

Passionate about student-centered, technology-enabled learning that is highly engaging, David began his career in user experience and moved into instructional design for online courses. He joined Wiley (then Deltak) in 2009 as Director of Online Learning. In that role, he worked with faculty members from the company's partner institutions to develop over 250 new courses per year, developing and refining new and more efficient processes for communication, planning, course development, and staffing along the way.

He now heads a team of instructional designers and media specialists who lead innovation in story-driven learning, case-method teaching, and faculty communities of practice. Today they develop and manage a catalog of over 2,000 distinctive online courses in a wide array of degree programs.

David has a Bachelor of Arts in Comparative Literature from the University of Illinois at Urbana-Champaign and an MA in Humanities from the University of Chicago.

Catie Starr, Vice President of Marketing

Before joining Wiley Education Services in 2016, Catie spent the majority of her career at large financial services companies including Discover, Charles Schwab, General Electric, and Bank of America. Moving to the higher education field was a big change, and a welcome one, she says. "Working for a company that is so closely focused on improving people's lives was a breath of fresh air. I was excited to find an opportunity to apply the skills and strategies I learned in financial services to the field of education." Her desire to help others is reflected in the company's commitment to its core values every single day. "Starting with my first interview here, I have been consistently impressed with how important our core values are to the organization and how much they mean to the people who work here," she says. "When we say we're a learning culture, we live it."

In her current role, she leads a team of experts in brand strategy, digital media and analytics, UX testing and optimization, and content strategy. Together they are responsible for representing partners' brands and creating marketing strategies to attract and reach new students.

Catie has a Bachelor of Arts in Communication from Bradley University and an MBA from San Diego State University. She works primarily out of the Chicago office.

Jocelyn Stiefel, Regional Director of Brand Management

Jocelyn joined Wiley Education Services in 2010 and is responsible for leading the brand management team in the Chicago office and overseeing marketing strategy and performance for her portfolio of partner schools. Prior to Wiley, Jocelyn led account management at Chicago advertising and promotions agencies, OgilvyAction and Marketing Drive where she managed the development of integrated marketing plans for a variety clients including: Bank of America, BlackBerry, Dole, Kimberly Clark and National Dairy Council. Jocelyn earned her B.S. in Communications at Bradley University and currently resides in Chicago, IL.

Kelly Lewis-Pratl, Senior Director of Market Strategy and Development

Kelly joined Wiley Education Services in March 2010 and is now responsible for leading the Wiley Education Services corporate brand and associated B2B marketing efforts, the Market Strategy and Research team and New Partner Startup Marketing teams. Prior to joining Wiley, Kelly worked at advertising agencies Crispin Porter + Bogusky and Leo Burnett, where she managed accounts for Volkswagen, Old Navy, and Kellogg's. Kelly holds a BA in English and Communications and an MS in Arts Technology from Illinois State University.

David Capranos, Senior Director, Market Strategy and Research

David leads a team of market research analysts who provide Wiley and its partners with the data necessary to bring strong online programs to market. David worked in the health information technology field before joining Wiley Education Services in 2010. He has held positions in Admissions, Marketing, Decision Sciences, and Business Development. He holds a Master of Business Administration (with a concentration in Marketing) from the University of Scranton and a Bachelor of Science in Business Administration (with a minor in Economics) from the University of Central Florida.

Loralee Dyers, Senior Analyst for Market Strategy and Research

Loralee has been with Wiley Education Services since 2015 and is a Senior Analyst within the market strategy team based in the Chicago office. She has a Bachelor's in Psychology from the University of Southern California as well as a Master's in Forensic Psychology from the Chicago School of Professional Psychology.

Wes Miller, Director of Content

Wes Miller joined Wiley Education Services in 2012 and serves as the organization's Director of Content. In this role, Wes is responsible for the development, implementation, oversight and optimization of Wiley's creative strategies and campaigns. He manages both copywriters and designers, and works closely with brand management to develop clear, creative concepts that emotionally engage consumers, connect them with the brand and ignite an ongoing relationship between the two. In addition to higher education, Wes has supported marketing efforts across a variety of verticals including consumer products, food and beverage, real estate, technology and entertainment. He has worked on some of today's biggest brands such as Kraft, Coca-Cola, SC Johnson, and Samsung, as well as with leading retailers such as eBay, Walmart, Sam's Club and CVS. Wes holds a Master of Business Administration (MBA) from Benedictine University as well as a BA in Advertising and Public Relations and BFA in Musical Theatre, both from the University of Central Florida.

Diana Hand, Senior Brand Manager

Diana has been with Wiley Education Services for five years. She has over 11 years of account and brand management experience, including client and partner relations, for a variety of focus areas including consumer, business-to-business, nonprofit and public awareness campaigns.

Prior to joining Wiley, Diana worked at GuideStar, a nonprofit in Washington, D.C., with a mission to help people make better, more educated giving decisions. Diana was in charge of the development and execution of marketing plans related to GuideStar's e-commerce products and nonprofit programs. Diana also worked on the Consumer Marketing team at Porter Novelli, responsible for account management of public relations and advertising clients including the IRS, FDIC, and Propane Education & Research Council.

Diana earned her BA in Communications at Virginia Tech and currently resides in the south suburbs of Chicago, Illinois.

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Drew Hill, Director of Media

Drew Hill joined Wiley Education Services in 2015. He is responsible for leading the media team, overseeing media planning, strategy, and execution for WES clients.

Prior to WES, Drew led digital media strategy at 10-2 Marketing, an education lead-gen startup, and Kitara Media (Propel), a leading digital media and technology company, where he oversaw paid search, social, video, and programmatic advertising.

Drew earned his BA in English Literature in Boston University and currently resides in Orlando, Florida.

Nicole Gauzens, Senior Media Manager

Nicole joined Wiley Education Services in July 2008. Nicole is responsible for leading regional media operations in the Chicago area and overseeing paid media performance for a portfolio of post-secondary educational institutions. She is also responsible for overseeing paid search and media technology strategy for all Wiley partner schools. Nicole brings more than 10 years of experience in digital advertising, web development, and communications.

Nicole would be responsible for developing the media plan forecast and managing the budget for the UM System's lead generation project. She would manage Rise Interactive's campaign execution as well as monitor and analyze performance and provide reporting to the UM system.

Nicole earned her BA in Journalism from UCF, and currently resides in Lake Mary, FL with her husband Rob.

4. Describe your company's experience as an enabler of online academic programs for higher education, specifically:

   a. Number of years as the service provider in this sector.

Response:

Wiley Education Services has exclusively focused on partnering with higher education institutions to build and grow their programs online for more than 20 years.

   b. Number and names of current partner institutions.

Response:

Today Wiley Education Services serves over 60 institutional partners, from small regional universities to large university systems, accounting for more than 600

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programs, 5,000+ courses, and over 50,000 graduates to date. Due to the proprietary nature of our partnerships, we are unable to disclose a complete list of our partner institutions. Some examples can be found in the case studies and references shared later in this proposal.

    c. Breadth of programs supported.

Response:

Over the last 20-plus years, Wiley Education Services has partnered with higher education institutions of all sizes, from small regional universities to large public four-year institutions like the University of Montana, and we support a diverse range of programs, from undergraduate to doctoral degrees. Our recent acquisition of The Learning House has provided us with additional expertise and resources in supporting associate's degrees and certificates similar to the ones offered at Missoula College.

5. Describe your company's experience with online academic programs. In addition, discuss any successes and challenges your company has encountered with these programs.

Response:

Wiley Education Services offers an unprecedented blend of expertise, experience, resources and reach to deliver differentiated value to the University of Montana. We are solely focused on higher education and student-centric in our approach. We speak to students every day and understand their journey, from their initial interest in higher education through to graduation.

We understand and offer the breadth and depth of expertise and resources needed to drive enrollment growth, as evidenced by our investments in people, processes, and strategic management of a cohesive set of 70+ technology platforms driving scale across over 60 partners and more than 600 programs. As a result, we are able to constantly capture insights from data found in multi-touch attribution, personalization and behavioral analytics, allowing us to optimize messaging, design and UX for better results. Additionally, our investments in market research and behavioral analytics help us anticipate industry trends and changing student preferences in both the regional Montana area and nationally.

Our Academic Services team has extensive experience developing undergraduate, graduate and professional online learning programs and courses in concert with faculty members. We value high-quality learning experiences that are distinctive, engaging, and provide the skills and knowledge that students seek and employers value. At our core, we focus on providing effective practices, methodologies, and

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support that faculty need to achieve their goals. Our approach is personal, proven, and outcomes-focused—helping faculty see the possibilities and achieve them.

This combination of investment in technologies and talent allows us to meet our partners at their point of need, quickly scale, and respond to changing market demands and needs in an agile manner.

With regard to successes and challenges, Wiley Education Services has identified core attributes that are critical for the success of a partnership. If there is any tension associated with any of these throughout a partnership, the likelihood for a challenge may increase. These core attributes include:

- Candor
- Shared governance and collaboration
- Acting as a partner, not just a vendor
- A flexible and customizable approach to services
- Reaching alignment on an institution's strengths and opportunities for a broad and deep portfolio of programs

6. Describe your company's ability to provide the staff, resources, technology, and management necessary to perform the scope of services.

Response:

As highlighted previously, Wiley Education Services has decades of experience partnering with institutions and supporting growth and scale over time. As innovation evolves, Wiley continues to make significant investments in technologies, training, and people to ensure we can provide high-quality service to all of our partners throughout the duration of each agreement. Our acquisition of The Learning House has further added to our capacity in terms of breadth of services offered as well as staffing levels.

Wiley currently support more than 60 institutional partners through varying levels of our service delivery framework. Our partner base includes a diverse cross-section of higher education institutions. From small, private colleges and universities to large, public land grant universities, our approach and service delivery model has proven effective across all types of institutions.

Our own growth over the last 20 years illustrates our ability to serve our clients at scale. Our proven processes and resources are a result of our experience and learns and have evolved to meet the changing needs of the higher education landscape as well as those of our partners. In addition, our teams across the enterprise are dedicated to meeting partner needs on an ongoing basis.

7. Provide points of contact for five (5) universities of similar size and type that your company has successfully served in the past. Of particular interest are points of contact where faculty and/or instructors are covered by a collective bargaining agreement and have traditions of faculty shared governance.

[redacted]

[redacted]

8. Describe how your company will work with different programs at the University requiring differing levels and types of services.

Response:

Perhaps one of the most unique aspects of Wiley and our support for partners is the flexibility of our partnership model. Decades of experience have taught us that no two partnership models look the same. We are advisors and consultants in a relationship where our partners and students come first. Therefore, we are always open and flexible when it comes to prospective partnerships. To follow through on our commitment to flexibility and collaboration, we developed a flexible model that we call our Solutions Architecture™ .

The following is meant to illustrate how the framework approach could operate:

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	PROGRAM A	PROGRAM B	PROGRAM C
Market Assessment	Wiley	Wiley	Wiley
Marketing—Online Programs	Wiley	Wiley	Wiley
Marketing—On Campus, Online and Hybrid	Wiley	Wiley	Wiley
Marketing on Ground	Institution	Wiley	Wiley
Recruitment and Enrollment Services	Wiley	Wiley	Wiley
Student Retention and Support	Wiley	Wiley	Institution
Academic Services	Institution	Wiley	Institution
Content	Institution	Institution	Institution
LMS	Institution	Wiley	Institution
CRM	Institution	Institution	Institution
International Marketing	N/A	TBD	TBD
International Recruiting	N/A	TBD	TBD
Faculty/Publishing Support	N/A	TBD	TBD
Market Size	Large	Medium	Large
Business Model	Revenue Share	Co-Investment	Fee for Service

Legend: ● Wiley ● Institution ● TBD

Today, we are capable of supporting our partners with the services they seek and deliver them in a way that aligns to the university's needs and expectations. For example, recognizing the complexity of the potential relationship and the variety of services that may or may not be required for UM Missoula and Missoula College (as well as other potential constituents), the Solutions Architecture™ approach allows you to craft a solution specific to each and, then establish the desired business model (tuition revenue share, co-investment and/or fee for service) based on each engagement. Furthermore, we can operate different models and services simultaneously based on the needs of the individual college or program.

9. Describe the process of program launch, including project management, establishment of benchmarks, and timeframes.
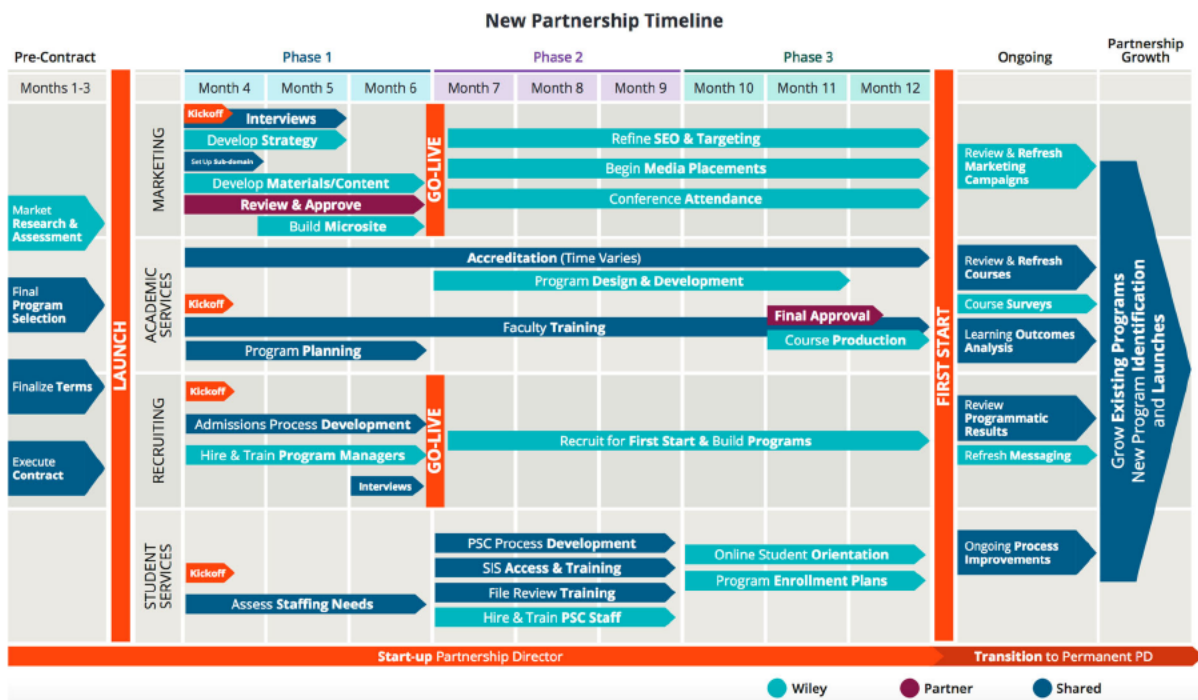
Response:

A project timeline is at the heart of every successful project. Should Wiley be awarded the contract, as we begin preparing for the partnership launch phase, we will provide a timeline that clearly identifies the roadmap to successful launch, and where effort is required, either from your institution or us. As noted in the previous section, this includes in-person visits to the partner institution on a regular basis, as

well as on an as-needed basis, to be determined by the partner and Wiley Education Services.

Typically, we take a three-phase approach to executing a launch plan. Your Partnership Director will work with your institution to develop and execute a project plan. The Partnership Director will draw on resources from across our business to execute your project plan deliverables.

The graphic below represents a high level overview of our typical plan and timeline for a full-service agreement. The corresponding table that follows provides additional details. We will discuss and mutually agree upon specific timelines for the University of Montana once we have identified the specific programs to be supported and finalize scope and tailored solutions.

Wiley Education Services (WES) 12-Month Process

New Partnership Timeline

The roles and responsibilities below are illustrative only and may change in the planning stages of the partnership.

Phase	Milestone	Owner
	Market Research & Assessment	WES

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Phase	Milestone	Owner
Pre-Contract	Final Program Selection	Partner/WES
	Term Finalization	Partner/WES
	Contract Execution	Partner/WES
Phase 1	Marketing: Development efforts begin (faculty interviews, marketing strategy)	Partner/WES
	Course Development: Begin accreditation process (if necessary)	Partner
	Course Development: Begin program planning	Partner/WES
	Student Support: Begin systems setup, integration, and implementation	Partner/WES
	Marketing: Develop marketing materials/content	WES
	Course Development: Begin instructional design and development	Partner/WES
	Recruiting: Begin process development and systems training, establish internal Wiley team, create program value story	Partner/WES
	Student Support: Begin student support and Personal Support Center process development	WES
	Marketing: Launch initial marketing efforts (landing page, RFI form, paid media)	WES
	Marketing: Begin website development	WES
	Course Development: Continue current efforts	Partner/WES
	Recruiting: Go live with recruiting efforts	WES
	Student Support: Continue current efforts	WES
Phase 2	Marketing: Continue current efforts	WES
	Course Development: Continue current efforts	Partner/WES
	Recruiting: Recruit students and build pipeline	WES
	Recruiting: Implement and test enrollment process	Partner/WES

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Phase	Milestone	Owner
	Recruiting: Perform analysis of competitive programs	WES
	Student Support: Establish team and train**	WES
	Marketing: Continue current efforts	WES
	Marketing: Final website approval	Partner
	Course Development: Continue current efforts	Partner/WES
	Recruiting: Host programmatic virtual open house*	Partner/WES
	Student Support: Continue current efforts	WES
	Marketing: Go live with the website, refine SEO and targeting	WES
	Marketing: Begin online media placements and affiliate advertising	WES
	Course Development: Continue current efforts and begin faculty training	Partner/WES
	Recruiting: Continue current efforts and begin New Student Orientation	WES
	Student Support: Continue current efforts.	WES
Phase 3	Marketing: Continue current efforts. Begin conference attendance and launch corporate marketing initiative.	WES
	Course Development: Continue current efforts.	Partner/WES
	Course Development: Begin course production	Partner/WES
	Recruiting: Begin student registration	Partner/WES
	Recruiting: Continue current efforts	WES
	Recruiting: Host programmatic virtual open house*	Partner/WES
	Student Support: Continue current efforts	WES
	Marketing: Continue current efforts	WES
	Course Development: Final QA of courses	Partner/WES

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Phase	Milestone	Owner
	Recruiting: Continue current efforts, refine value story and messaging	WES
	Student Support: Continue current efforts	WES
	Marketing: Continue current efforts	WES
	Course Development: Final approval of courses	Partner
	Recruiting: Continue current efforts, perform analysis of competitive programs	WES
	Student Support: Continue current efforts, perform final checks and preparations	WES
First start	First start	Partner/WES

*Virtual Open House dates will be coordinated with each program contact
**Student Support timing subject to change based on team staffing model
***Market research may occur post-contract

10. Describe the process of supporting UM faculty, staff and administrators in their efforts to document UM online programs to external entities, including, but not limited to: i) ranking organizations (e.g., US News and World Report), and ii) accrediting/licensing bodies.

Response:

Wiley Education Services can support these process in a number of ways. For ranking organizations, we can provide advice or help determining what rankings may best support your programs desired growth strategy, support in understanding ranking requirements of desired entities, and support gathering and reporting on key metrics measured by the ranking entity (if Wiley has access to those metrics). In some cases data we collect is not collected by campus, and we can provide insights into answering those questions thoroughly. That data may include term-over-term retention, graduation rates, and reasons for drops and withdrawals.

It is important to note that there are many ranking entities that may advertise themselves as the "most important: ranking in a particular field, or they may appear to be a legitimate prestigious online ranking. Not all ranking sites are equally respected, and not all ranking sites are beneficial to an online program. We have seen partners receive solicitations from ranking sites claiming that they can boost enrollments by listing their programs. These offers are not always what they claim to be. In some cases, these ranking sites will charge you to be listed, and may

actually be leveraging your name and program to the benefit of other programs listed on that site.

Wiley's marketing team will work with the University of Montana's online program leadership to assess each opportunity and determine which ranking sites are best for your program growth strategy. In some cases, depending on the marketing strategy for each program, Wiley may choose to invest on your behalf in listings on key ranking sites. In these cases, we have pre-evaluated chosen ranking sites to beneficial to your program growth, and will manage those listing on your behalf on an ongoing basis.

For accrediting and licensing, bodies, Wiley can provide:

- Help interpreting the accreditation standards, and how they might translate to program design, learning outcomes, and course building
- Learning design support via our Academic Services team, to build courses that comply with accreditation standards
- Support for strategically marketing key accreditations to prospective students
- Help ensuring compliance to standards for marketing messaging with students
- Reporting on any key metrics measured as a part of the accreditation, where Wiley has access to those metrics

11. Describe your process in dealing with institutions and federal financial aid regulations (Pell Grants, SEOG, Return to Title IV, etc.)

Response:

Wiley does not provide direct guidance to the institution on federal financial aid regulations.

The Wiley Operations team, in accordance with University guidelines, collaborates with the Bursar's Office and all other University Offices that the student might need to interact with to ensure a seamless transition from admissions to enrollment.

Through our Student Success Coordinators, the Wiley team may advise and coach the students on timelines for completing important documents or online forms (e.g., FAFSA) necessary to ensure enrollment.

12. Have you been involved in any federal, state or institutional audits at any of your partner institutions? If so, describe.

Response:
No, Wiley Education Services has not been involved in any federal, state or institutional audits at any of our partner institutions.

13. Describe any litigation, active or within the last five years, against your company.

Response:

Wiley Education Services has not been involved in any litigation within the last five years.

14. Describe the company's processes for reporting learning outcome achievements, recruitment/marketing activities, enrollment projections, student attrition, and support issues.

Response:

Ongoing communication and reporting will occur between Wiley Education Services' Partnership Director and the university's designated contact on achievement of project goals, performance tracking, status of potential issues requiring escalation, and team dynamics. This is typically done via the following schedules.

Operational Governance
- **University Weekly Update:** an organized and easily scannable document delivered each week/month with high level information on topics such as:
    - Priority topics for discussion
    - Upcoming events
    - Key milestones
    - Admissions trends
    - Marketing trends
    - Operational trends
- **Reoccurring Status Calls**: a standing call, led by Wiley Education Services' Partnership Director, with all relevant stakeholders in attendance to align the teams on progress, outstanding items owed, timeline risks and any concerns.
- **Real-time Communication:** reciprocal calls and emails returned in a timely manner to keep projects on tracks.
- **In-person Meetings:** in-person meetings are sometimes necessary and can be at the request of the university or Wiley Education Services. Both parties are expected to make reasonable efforts to coordinate schedules.

Strategic Governance

Executives should meet on an annual basis to assess progress, relationships and the culture of the partnership. The effectiveness of the relationships developed at this level help set the tone for the overall partnership and how issues will be resolved. At a minimum, a joint partnership update should be given by each entity, as well as the

status of high-level unresolved issues (if any). Agendas beyond these two critical items can vary depending needs.

15. Provide a plan with measurable deliverables that advances UM's mission and goals, consistent with its strategic plan (http://www.umt.edu/strategy/), capabilities, and academic and research competencies. Break the plan down to include sections addressing:

    a. Doctorate level programs

    b. Masters level and accreditation/licensure programs

    c. Bachelor's level programs and courses

    d. Specialty programs targeting professional skill development (broadly stated) for corporate partners.

Response:

The following information represents Wiley Education Services' preliminary plan based on labor market indicators coupled with our understanding of UM's mission and goals and consistent with your strategic plan. We propose a multi-phase approach starting with four existing online programs.

We recommend the following degree level programs:

a. **Doctorate level programs:**

   i. One (1) new program in Phase Three: Doctorate in Physical Therapy (DPT).

b. **Master's level and accreditation/licensure programs**

   i. Thirteen (13) master's degree programs:

      1. Four existing online programs in Phase 1: M.Ed. in Curriculum and Instruction, M.Ed. in Educational Leadership, MPA in Public Administration, MPH in Public Health.

      2. Four new online master's degree programs in Phase 2: Three focused on Business (Accounting, Business Analytics and Business Administration), and an MSW in Social Work

      3. Five new online master's degree programs in Phase 3 listed in the table below.

c. **Bachelor's level programs and courses**

   i. Bachelor's level programs will be considered after performance during first three to four years of partnership.

d. **Specialty programs targeting professional skill development (broadly stated) for corporate partners.**

  i. We recommend a portfolio of degree programs and certificates to maximize the desired skill development of students and the reach of the University's brand.

The following milestones will be pre-requisites for each program:

- Dean of College or School in support of program goals and timeline
- Marketing begins 9+ months out
- Instructional Design begins 6+ months out

Preliminary Program Startup and Launch Plan

Regional Labor Trends Alignment	Program	Details	Degree Program	Degree Level	Program Type	Phase	Date to Start	Time to Complete
Education	Curriculum Studies	Curriculum and Instruction	M.ED.	Master's	existing	1	Jan-20	9-12 months
Education	Educational Leadership	Educational Leadership	M.ED.	Master's	existing	1	Jan-20	9-12 months
Business/Administration	Public Administration	Public Administration	MPA	Master's	existing	1	Jan-20	9-12 months
Health Care	Public Health	Public Health	MPH	Master's	existing	1	Jan-20	9-12 months
Business / Administration	Accounting	Accounting	MS & MBA with Concentration	Master's	new	2	Fall 2020 / Spring 2021	12-24 months (*)
Business / Administration	Business Analytics	Business Analytics	MS & MBA with Concentration	Master's	new	2	Fall 2020 / Spring 2021	12-24 months (*)
Business / Administration	Management / Administration	Business Administration	MBA	Master's	new	2	Fall 2020 / Spring 2021	12-24 months (*)
Business / Administration	Social Work	Social Work	MSW	Master's	new	2	Fall 2020 / Spring 2021	12-24 months (*)
Computer Systems/Engineering	Cybersecurity Administration	Cybersecurity Leadership and Policy	MBA	Master's	new	3	Fall 2021 / Spring 2022	12-24 months (**)
Education	Counseling	Clinical Mental Health	Master's	Master's	new	3	Fall 2021 / Spring 2022	12-24 months (**)
Social and Human Services	Healthcare Administration	Healthcare Administration	MBA	Master's	new	3	Fall 2021 / Spring 2022	12-24 months (**)
Education	Counseling	School	Master's	Master's	new	3	Fall 2021 / Spring 2022	12-24 months (**)
Health Care	Physical Therapy	Physical Therapy	DPT	Doctorate	new	3	Fall 2021 / Spring 2022	12-24 months (**)
Health Care	Speech and Language Pathology	Speech and Language Pathology	MS	Master's	new	3	Fall 2021 / Spring 2022	12-24 months (**)
							(*) Beginning year 2 of contract	
							(**) Beginning of year 3 or 4 of contract	

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B. Market Research

1. Describe in detail your firm's approach to market research and assessment including how data and processes are used in reporting, with examples of your company's success in regard to market research and assessment.

2. Describe how your company conducts market research to aid in identifying and aligning current and potential degree/certificate programs with regards to:

   a. growth potential
   b. strong operating margins
   c. strong completion rates by students
   d. institutional mission
   e. institutional strengths

Response:

All potential programs are rigorously assessed, using a blend of data analysis and deep market knowledge, before we recommend bringing them to market. As a first step, we conduct a full market assessment of a prospective partner institution's existing on-ground certificate and degree programs and any online certificate, undergraduate, and graduate program offerings. During this process, we consider both regional and national opportunities for alternate versions of your current programs, and evaluate your institutional position compared to other regional and national institutions.

As part of this effort, we collect publicly available data and conduct interviews with your institution's designated points of contact. We will provide you with the results of our analysis as follows:

- Program assessment on existing and new offerings based on high, medium, and low growth opportunities
- Analysis of market pricing for programs
- Analysis and recommendations on program structure
- Analysis on employment trends related to program offerings

We will work closely with you to identify the right growth opportunities to meet our mutually agreed upon objectives. Certain variables contribute to a positive assessment including the program's opportunity for growth, key institution strengths, potentially strong operating margins, and potentially strong student completion rates.

Our market research team calls upon three core categories for insight:

- **National Marketplace:** Analysis of reported graduate data via the Integrated Postsecondary Education Data System (IPEDS), which allows us to understand the total population, multi-year growth trajectory, and individual program size for a particular degree.

- **Leading Indicators:** Using our internal marketing data, plus external marketing performance and labor market data, we develop a more complete picture of the program(s) opportunities available.
- **Competitive Analysis:** Assessment of the competitive market to determine a unique position and competitive advantage for our partners. Our research reviews a wide range of aspects including price, curriculum/specialization, rankings, institution/departmental strengths, entry requirements, and analysis of various other quantitative and qualitative variables.

Using the market research, we develop a detailed plan designed to achieve specific growth targets. This research also informs the development of a considered and mutually agreed upon financial model.

Insight-based Program Selection

We know that selecting your programmatic offerings is not always an easy process. Without the right analysis, it's difficult to determine which programs will be successful. As part of our market research, we look at the potential demand for the program(s) being considered. To get a clear picture of the program marketability, we examine future labor market data, and current Google search statistics and trends, as well as other sources such as IPEDS, National Center for Education Statistics, Higher Education Statistics Agency, American Job Center, O.net, U.S. News and World Report, Inside Higher Ed, and the THE World University Rankings.

Sample Wiley Education Services Marketing Research for Partner Universities
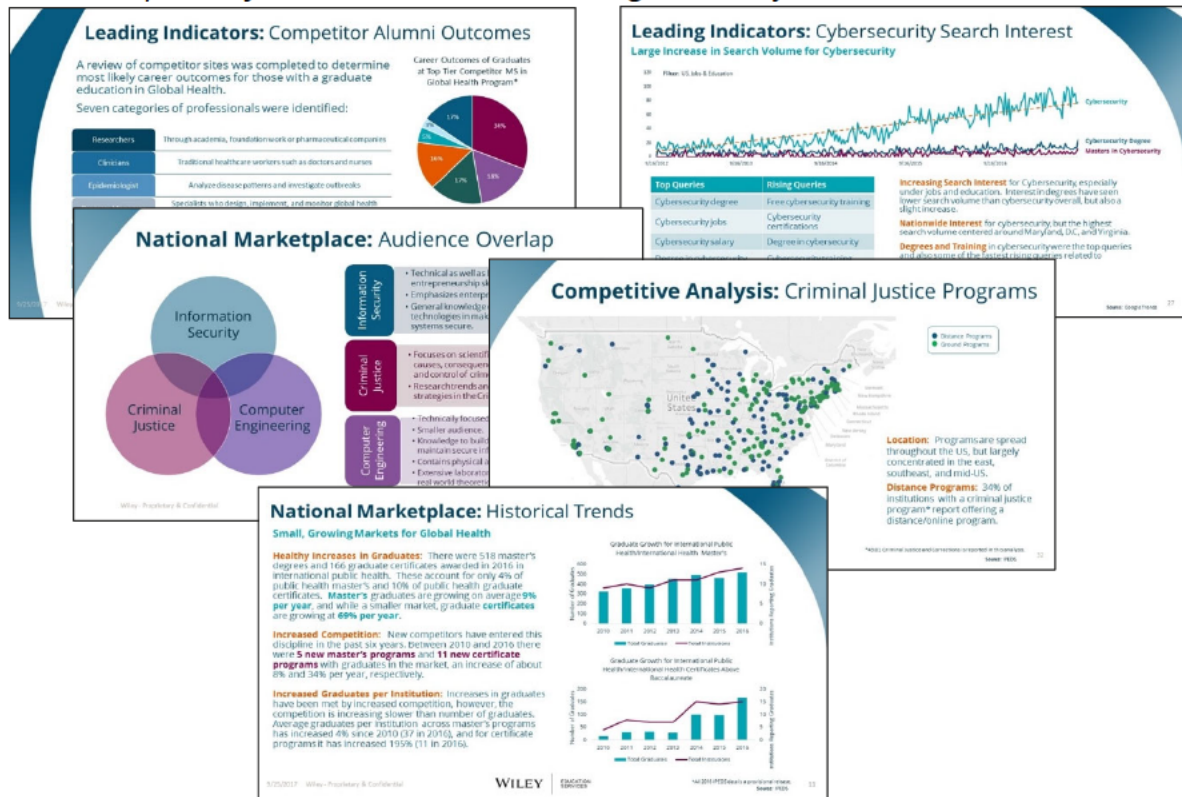
Certain programs thrive in the market because they give students the knowledge they need to succeed in a given industry. By reviewing labor insights, we can provide you with a deep understanding of the employment environment and the potential career opportunities for successful students.

But our job market expertise goes beyond traditional labor statistical analysis. We draw on relevant market insights from real-time employment demand solutions, based on national, aggregated job postings. Examples of this research include top-requested skills, minimum expected education levels, desired credentials, and geographic employment demand reports. This comprehensive research offers a more in-depth view of current and upcoming employment trends, helping to drive program success.

Phased Market Assessment: Systematic Approach

Our three-phase approach, highlighted below, will help you identify which programs will thrive in the market and how many programs you might initially launch with us. By conducting interviews with your institution and undertaking our own market analysis, we are able to provide you with accurate insights into how the programs we would bring to market might perform.

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Phase 1: Partner Interviews and Research Objectives

We will conduct an interview (or set of interviews) to understand which programs align with the goals of your institution and the employment opportunities for students. Your input during this phase is invaluable. In addition to the interview, we may ask you for the following in order to provide a more robust market overview and recommendation:

- Completion of the Program Information Sheet
- Access to your experts (program leaders, faculty, etc.) who have insights within the research scope
- Research already completed that could assist in providing additional market insight
- If the program currently exists on campus, student demographic information, student survey results, alumni information, etc.
- Program approval information

Once the interviews have been completed and materials reviewed, the research objectives, milestones, and timelines will be defined, discussed, and agreed upon before research commences.

Phase 2: Research and Analysis

Once we have collectively reviewed and established our objectives, we perform an in-depth market study. If applicable, we may undertake qualitative and quantitative research to reveal how a particular program is currently performing in the market. To determine the viability of a program, we draw on relevant data sources, including:

- Industry and online student market data including demographics, psychographics, media usage, size of target audience, and identification of current and future trends
- Higher education, employment, and labor insights databases
- Association and industry news and reports
- Interviews with key experts
- Degree completion data

After reviewing the information obtained from these sources, we analyze each program opportunity by considering the following:

- **Market Relevance:** To help determine the program's viability, we look at how similar programs are performing and identify how the discipline is currently viewed in the marketplace at national, regional, and peer institution levels.
- **Labor Insights:** Certain programs thrive in the market because they give students the knowledge they need to succeed in a given industry. By

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reviewing labor insights, we have a deep understanding of the employment environment and the potential career opportunities for successful students.

- **Program Attributes:** It is important to review how a program will fit in a particular market, as well as understanding what market alternatives are available. By considering attributes such as program structure, tuition, number of credit hours, starts per year, and your institution's willingness, we can see whether the program has the potential to thrive, or whether certain components need to be reconsidered.

Once the above has been completed, we prepare a draft report providing an overview of the methodology, limitations, findings, and recommendations, with appendices of relevant data. The draft report includes a summary of findings and recommendations, as aligned with the agreed objectives and recommendations.

Phase 3: Strategic Recommendations

Upon compilation of the draft report, we will meet with you to discuss the key findings and program recommendations. We will help you determine how the potential program(s) may perform in the current market, the likely enrollments, and how we may evolve the program over time to maximize results.

Our final market research informs our recommendations for each potential program. It specifically helps us determine the marketability of specific programs, the overall appeal to prospective students, and any other institutional or program factors that may affect the overall scalability of the program.

We use the research to classify your programs as follows:

- **High Growth/High Yield Program:** A program with a healthy market demand, capable of achieving a minimum of 300 enrollments. The program has adequate faculty/instructors, appropriate structure to accommodate growth, and few factors that could limit the capacity to expand or re-develop courses.
- **Medium Growth/Medium Yield Program**: A more niche subject matter program than a high growth/high yield program, but still with a healthy market. There are some factors, including faculty, program structure, or other institutional constraints, that prohibit high growth/high yield. Such a program can expect to achieve between 150 and 300 enrollments.
- **Low Growth/Low Yield Program:** A specialized program where demand is limited by factors including faculty, program structure, institutional constraints, and most importantly, programmatic focus. These programs are capable of achieving up to 150 enrollments.

After completing a report with all the findings, we will work with you to establish program-level objectives. Once we receive your input, a final market strategy and

research report will be prepared. Working together, we can use this report to determine which programs to bring to market.

After the appropriate program(s) have been identified, we begin laying the foundation for the pre-launch stage. Our research into market viability and anticipated student interest is key to our ability to forecast enrollments, establish a budget, and prepare your program for market.

Summary: Our Long-term Commitment

Program evaluation does not end at the inception stage. In addition to helping you determine program viability, we are committed to your success throughout our partnership. Using data-driven market research, our dedicated teams will work with you over the duration of the partnership to provide periodic updates on market relevance, current labor insights and trends, and other factors that can impact your online program's health and growth. Our research serves as a continuous driver of long-term partnership strategy. As illustrated in the visual below, we will continue to strengthen the partnership by recommending additional programs to bring to market as the initial programs reach maturity.

Market Strategy & Research

Market research as a continuous driver of *partnership strategy*.

| START-UP | MATURITY |

New **Programs**

New **Specializations**

New **Programs**

As the partnership evolves and matures, we continue to rely on market research to inform selection of and investment in programs

For an example of our success in market research and assessment, please see Exhibit D or go to https://edservices.wiley.com/purdue-university-growing-online-programs-enrollments.

3. Describe your company's ability to identify specific groups or markets that you would target for recruiting/marketing activities for the University.

Response:

Understanding who the "right" students are for each of the University of Montana's institutions and programs is something that is fundamentally core to our operational practices, from marketing to recruitment to retention. As a first step, as outlined above, we obtain research-specific data from extensive industry research, surveys, labor data, and catalogue reviews, resulting in insights to inform a program portfolio selection that matches market demand. Working with our partners, we identify the most strategic and scalable anchor programs that play to the unique strengths of the institution or fill a gap in the market.

We collect data points on demographic, psychographic, and persona segmentation for each individual program at each point of the student journey, which further helps us to identify specific audiences to target for each partner and individual school or college. For example:

- **Marketing:** Wiley' Education Services' proprietary technology allows us to optimize websites and ensure that they are engineered to have the best response rates based on language, images and design. Our search analysis tools help to identify ideal candidates based on search data and continue to follow the digital footprints of those students. Understanding their demographics, persona, and preferences allows us to effectively engage and communicate with "right fit" students for each of the programs. Our data scientists provide real time data to evaluate marketing performance and proactively adapt approach.
- **Recruitment:** To continually improve student engagement quality and increase overall conversions, our Enrollment Services team uses an active information-gathering tool known as Behavioral Analytics to capture and analyze all telephone interactions and then subsequently applies sophisticated algorithms to these interactions to identify patterns and events. This tool allows us to "learn" the traits of successful prospective student interactions by evaluating and comparing those interactions that lead to an enrollment to those that do not. Over time, this gives us the ability to coach toward our most successful calls, predict the likelihood a student will enroll, and provide coaching and feedback based on the interactions we have with potential students. This data is then shared back to our marketing teams so that they are proactively communicating with each designated group to bolster student interest and engagement.

Using this type of targeted approach would help ensure we use resources effectively

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and consistently identify the most receptive groups and markets for the University of Montana's programs even as industry trends and market needs shift.

C. Marketing and Recruitment

The partner shall work with the appropriate University official(s) regarding the universities brand guides and academic and administrative web policies.

Response:

Wiley Education Services' Marketing and Recruitment teams always work within our partner institutions' brand guides and academic and administrative web policies.

1. Describe in detail your company's approach to marketing and brand management.

Response:

Overview of Wiley Education Services Approach to Brand Management

Backed by decades of experience, our marketing professionals provide expertise in marketing strategy, user experience, content, media planning and management, email marketing, brand management, web development and technology and project management. This experienced team will support the UM-Missoula and Missoula College programs identified and develop a marketing plan to best reach and engage with prospective students throughout their journey—from inquiry to graduation. The marketing plan would outline objectives, target market(s), campaign resources, timelines, appropriate marketing platforms and the data necessary to identify potential students.

The team will activate the marketing strategy and plan, which delivers, measures, and optimizes your campaign assets across a wide variety of established media channels. In today's omnichannel media world, students rarely follow a linear path to enrollment. Our approach to marketing and planning support the multiple enrollment paths of prospective students. No matter the student's starting point, Wiley Education Services' combination of technology and services provides students with flexible pathways to enrollment.

Wiley has the ability to execute across multiple media types and assets. We are able to draw upon our talent pool of over 100 strategists, editors, writers, designers, creative technologists and experience makers that work across all the digital and physical channel touch points.

Upon execution of the identified campaign(s), we have the ability to update banner copy dynamically in minutes without creating entirely new ads. We test copy and design elements on our media landing pages daily to improve visitor-to-inquiry

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conversion rates. We experiment with the presentation of programmatic content on our partners' websites to understand how students want to digest information. All of these efforts collectively allow us to outperform the static campaigns of the competition and capture the ever-changing preferences of today's students.

Wiley Education Services currently runs 13,000 higher education marketing campaigns.

Programmatic Marketing: Optimized Approach

Our marketing efforts are focused on finding students who are passionate about learning and committed to graduating. To attract these students, as well as using traditional marketing approaches focused on tracking audience size or viewers, we use tailored digital techniques to provide detail on individual behaviors, traits, and actions. This gives us the ability to identify the right prospects, with the right admissibility characteristics for your program(s), which in turn helps us reach them in the right way.

Traditional Marketing: High Awareness, Low Conversion

A billboard is a good representation of traditional marketing, though we could equally pick direct mail, radio, or television as an example. A billboard's value is measured by potential views over the course of a month in this case, we will use 100,000 views a month. While this form of marketing can raise brand awareness, often less than 5 percent of the people passing this ad even notice it, and of those 5 percent, only 3 percent may qualify for purchase. And of those 3 percent, only 25 percent may be interested in the product advertised.

If the 25 percent convert at an above average rate of 20 percent, this means the ad has attracted eight buyers from a potential audience of 100,000—a conversion rate of just 0.008 percent.

Marketing dollars have been spent advertising to 100,000 people, because there is no way to select who sees the ad. While cost-per-viewer might be competitive, cost per conversion leaves a lot to be desired. Thus, for eliciting a direct response (i.e. inquiry generation), this traditional form of marketing is inefficient.

Buying web ad space is equivalent to buying a digital billboard, albeit slightly more aligned to the target audience due to the website placement. For individual graduate programs, the conversion from ad to customer is very small, and—as with all traffic-based advertising—the conversion rate decreases as the product offering narrows.

In the education sector, this type of web advertising is often best used to promote the institution or a more generalist program, where you need to reach more people in order to create brand or programmatic awareness.

Where we support a portfolio of programs, a small amount of the budget may be applied to promoting the institutional brand to efficiently drive inquiry generation, but this is always underpinned with more targeted user-behavior advertising for specific programs.

Digital User Behavior Advertising: High Awareness, High Conversion

Digital user-behavior-ads do not focus on traffic volume alone. They are also oriented on your users' "digital footprint," or digital profile.

A digital profile is compiled from a number of user behaviors, including internet searches, sites visited, online purchases, social networking, devices used, and time spent. Once a profile is established, only relevant ads are shown to that user type. This means that every individual in 100,000 could witness different ads as they navigate around the web. The opportunity for distinction increases with the complexity of the data layered against the profile. To break this down further, if a website receives 100,000 views a month, it may be that only 0.3 percent of those have a digital profile matching the specifications in our ad.

However, since these individuals are more accurately targeted—based on profiles similar to others who subsequently convert—it is highly likely that at least 3-5 percent will convert. In this instance, the advertiser is paying for only the ad to be shown to 300 individuals who are interested in the product, converting to 9-15 buyers. So, while it may be costlier to create the profile and execute the targeting, in the end the advertising will be efficiently and accurately aligned to the audience.

BUILDING BLOCKS OF MARKETING STRATEGY

Focus on individual users instead of where ads are shown.

A digital profile is created per user using INTER-NET searches, websites visits, online purchases, social media activity device, time, location, IP address, etc.

Technology evaluates users using advanced algorithms in fractions if a second, millions of times per day.

RESEARCH, TECHNOLOGY, AND DATA-MAPPING HELP IDENTIFY PROSPECT MOST LIKELY TO APPLY. AND TARGET THEM WITHIN A LARGER AUDIENCE.

Users and Conversions Before Physical Ad Locations

With this digital marketing approach, you can serve ads across thousands of websites simultaneously. Using algorithms that operate in a fraction of a second, millions of times per day, the technology allows us to target ads to users wherever they are online, rather than displaying ads at given time periods.

Media Channels Used in Digital Performance Targeting

Paid Search: We manage multiple paid search campaigns operating in different and sometimes overlapping times of day, geographies and devices. We optimize a number of keyword groups daily and employ a variety of bid strategies based on the marketing opportunities available. Utilizing behavioral and historical data sets, we can establish a prospective student's potential by aggregating their search history around the clock, every day of the year, in all applicable geographies.

Display Advertising: Our media team utilizes all available targeting intelligence to ensure our campaigns are as effective as possible, evolving the online advertising methods to respond to market conditions. For example, our initial launch efforts might involve boosting awareness to generate program interest and building a re-marketing pool. As the profile of suitable applicants develops, we adopt a more targeted campaign approach. While more targeted initiatives require greater

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investment, they significantly improve your reach to more applicable, quality prospects.

Programmatic Buys: The accuracy of our profiling, which underpins all our advertising initiatives, is the result of 20 years of data collection. This data includes everything from student inquiry generation through to graduation, spanning more than 750 different programs. Historical information and look-alike profiling of programmatic candidates are currently leading programmatic buying strategies. Our tactics also include re-marketing, which gives us the ability to "follow" visitors who have not yet converted with advertising.

Through our unique technology, buying access, and an ever-expanding database, data is continually updated for more-targeted ad purchasing. The technology also gives us the means to quickly switch to better-performing ads for profiles.

Direct Buys: For the most part, direct ad placements on one website lack the necessary targeting sophistication to maximize quality responses, since our media team must rely solely on the number of impressions to assess its value. However, direct ad buying can be more cost-effective when we have access to the historical conversation data.

We do not pursue direct placements when we are already attracting quality applicants. We will invest in direct buy when there are clear benefits in doing so. For instance, we have participated in event-focused environments, like the GMAT Club Forum, which highlight key program dates. Typically, these investments offer program visibility and access well beyond the banner placement, the impressions, and the traffic garnered. The associated spend often affords the program privileged integration into the site's narrative.

Marketing should always be tailored to the specific goals, targets, and culture of your institution and programs.

The chart below highlights some of Wiley Education Services' targeting abilities and demonstrates how these capabilities have even evolved over time:

	Early Digital Advertising	Wiley Education Services Performance Targeting
Primary Focus	Ad Placements	Target Audience Profile
Buying Philosophy	Relevant Environments/Verticals	Conversion Modeling/Look-Alike Profiles/Data Profiles
Dayparting	Limited Daily and Weekly Segments	Real Time
User Data	Limited Age and Gender	Psychographic, Buying History, Personal Interests
Buying Currency	Impressions	Conversions
Attribution	Last click	Multi-Touch

In an increasingly competitive marketplace, we know it's critical to focus on audience selection and messaging in addition to channel and creative. That's why we design and deploy experiences to meet students where they are in their research journey.

Channel Strategies (Paid and Organic)

All media planning work is conducted by our internal connections team. The team is comprised of holistic media planners and buyers that have built their practice for today's cross-channel world, with a combination of broad media thinkers and subject matter experts. Our capability runs the channel gamut, including all things search, social, broadcast, print, outdoor, digital, mobile and emerging media. The media team members are involved from the earliest planning stages, strategy and ideation through to performance measurement.

We see it as organic and paid search in a coordinated approach, increasing page authority, developing awareness and gathering data to continuously improve campaigns.

Earned PR's role

Our public relations strategy develops cultural relevance and support through reputation and culture assessment and understanding of the marketplace truth/opportunity with media and influencers. We turn that cultural opportunity into awareness, driving tent pole moments in mainstream media and conditioning them to think of you in new ways. This will result in increased impressions—but by showing up in relevant and often unexpected ways, we also change the conversation, rally people around shared beliefs, and lift perceptions that can lead to consideration.

Search Engine Optimization

Our team has deep relationships with Google, Bing, Facebook, and a host of ad tech players who populate the search and content marketing landscapes.

For example, through our long-standing partnership with Google, we work closely with them to identify and implement optimization enhancements to support our partners across an ever-evolving academic and marketing environment. Our services team meets with Google regularly to share information and best practices to elevate marketing tactics and maximize returns.

Direct connections, like those with Google, give us access to industry news and updates as well as a trusted cadre of service providers and vendor partners. These relationships are critical for keeping pace with constant changes to search algorithms, native ad formats, new measurement techniques and emerging platforms.

Motivational Mining

We use search, social, and other data to understand what motivates people. This helps us to understand what's happening in the entirety of a potential student's life, not just the part of their life that matches what a business is selling. Because the information is based in actual behavior, the insights we gain are more reliable than those based on self-reported data. Motivational mining allows us to deliver meaningful connections by customizing student experiences based on what they want to do, not forcing them to do what we want.

Additional Analysis
- Technical Audit: We audit the website's technical performance using crawler tools and conduct a manual review of the domain and page-level issues identified by the tool(s). This audit process will identify areas for optimization in specific site performances.

- Analytics Review: We review site analytics to understand lead-to-customer performance data and sales performance metrics in order to garner addition insight into optimization opportunities for organic search, lead flow, lead generation and conversion performance.
- Strategic Review: We conduct a heuristic evaluation of the website experience and content, providing additional insights based upon the previous two steps and based on our past experience in evaluating and optimizing lead and conversion-based digital experiences.

Tools We Use
- STAT Search Analytics: STAT provides massive-scale, real-time search data.
- SEM Rush: This software is designed to provide digital marketers and online businesses with competitive data to inform marketing and business decisions.
- Deep Crawl: This is a very comprehensive web crawler, used to analyze your website architecture to understand and monitor technical issues to improve your SEO performance.
- MOZ: MOZ is a keyword and competitive research, and search engine results page analysis tool.
- Google Analytics
- Google Trends

Cultivation Strategies

Lead nurturing (cultivation) campaigns are technology-enabled outreach to prospective students who enter the recruiting pipeline database, using creative approaches to reengage and spark interest. This typically includes a series of strategic emails and SMS messages tailored to the specific funnel stage and aging of an inquiry. When a prospective student re-engages with an admissions representative, speed-to-contact becomes critical. Data has shown that Speed-to-Lead is the single largest driver of enrollment. In fact, prospective students are 156 percent more likely to enroll if they are called between 0-1 minute after requesting information.

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2. Provide examples of your integrated marketing and communication plan and execution with similar universities.

Response:

Marketing Planning Across the Student Lifecycle, for Multiple Learning Paths

Wiley Education Services will provide the University of Montana with the relevant strategies and planning to find, message, recruit, and retain students who are most likely to persist and graduate. Our team has a proven track record of implementing these strategies to increase enrollments and graduation rates across a number of distinct programs.

To achieve this, we believe in an iterative process that begins with deep institutional discovery to inform a custom integrated marketing plan and then evolves toward leveraging data points from ideal student experiences to attract best-fit students over time. The campaigns we outline as part of the plan are real-time efforts that continually improve and lift engagement based on audience feedback. Our student-facing experiences are all built on more than 70 best-in-class marketing systems, allowing us to constantly capture insights from data found in multi-touch attribution, personalization and behavioral analytics, allowing us to optimize messaging, design, and UX for better results. These technologies and tools equip our marketing team with the data and automation required to propel their efforts in finding the ideal students for our institutional partners. The combined level of investment in technologies and talent allows us to meet our partners at their point of need, quickly scale, and respond to changing market demands and needs in an agile manner, which maximizes cost-efficiency.

Our overall marketing strategy is guided by specific programmatic goals and guardrails to efficiently direct spending and resource allocations based on the business needs of the University of Montana. In this way, we can be sure that our efforts are continuously aligned with enrollment projections as well as a dynamic market.

Partner Success Example: George Mason University

George Mason University (Mason) is a rapidly growing institution located in the heart of Virginia. As Virginia's largest public research university, the institution strives to help students succeed, enrich the local community, and contribute to solving the global problems of our time.

Wiley Education Services' full-funnel approach uses audience segmentation and creative messaging to move students through their enrollment journey. For George Mason's Master of Health Administration program, we first began by generating targeted awareness within key Health Administration audiences through the use of dynamic messaging banners and paid social media. As potential students move

lower in the funnel, we then direct them to a programmatic experience engineered to capture student information in our CRM. Once in our database, they experience our automated digital messaging chase focusing on key deadlines, program updates, and faculty spotlights.

Challenge: Using Social Media to Build Brand Awareness and Affinity

As a rapidly growing institution, George Mason University has increased its brand awareness across the United States at an impressive rate. The challenge facing the Wiley Education Services team involved determining how to best continue to build on the institution's brand momentum in an environment in which our target audience is constantly shifting on various social media platforms. As we currently leverage Facebook, Instagram, and LinkedIn, we wanted to explore another channel to see how it would impact overall brand awareness.

Approach

Wiley Education Services created a 10-day Snapchat campaign specifically designed to increase brand awareness and affinity through the use of a geo-targeted filter to those in the Fairfax Virginia area. The goal of this filter was not only to test Snapchat performance across key performance metrics, but also the viability of the social media channel itself as an additional resource for supporting our partners and their programs.

Results

With only a $550 spend, we were able to generate:
- $5.06 ECPM (effective cost per thousand)
- 108,600 impressions (People who saw the filter)

- 5,100 shares: People who used the filter and sent a snap
- 381 saves: People who took a screen shot of a snap using the filter

Challenge: Leveraging Innovative Video to Increase Lead Generation

As an increasing number of advertisements flood social marketing channels, a rising number of consumers are growing "ad blind." The challenge that has become increasingly apparent is: How do we get consumers in our target market to pay attention to and engage with our partners through our marketing efforts on social channels?

Approach

Wiley Education Services partnered with Shuttlerock to create engaging videos that were then tested with George Mason University's MBA and MEd in Special Education programs. Wiley Education Services piloted the Shuttle Rock video on Facebook over the course of 21 days in order to increase brand and program awareness to ultimately increase lead generation.

Results

MBA	MEd in Special Education
776,180 impressions	675,588 impressions
1,548 clicks	1,414 clicks
40 leads	37 leads

Partner Success Example: Wiley Digital Lead Expertise with Enrollment Success at Purdue University

 Today, Wiley supports seven specialized online programs with Purdue, but in 2014, this MS in Communication was only the second program to launch in this partnership. According to the Integrated Postsecondary Education Data System (IPEDS), the number of graduates for master's in communication programs nationwide has remained relatively flat at 4,000 per year since 2014, and the average number of graduates per institution is low at 16. Our objective was to generate enrollment growth for this MS in Communication program through nationwide digital media efforts including paid search, social, affiliate marketing and display.

Within four years, Wiley grew this online MS in Communication to 1,129 starts—making it the largest graduate program at this institution.

Please see the full case study in Exhibit D or at https://edservices.wiley.com/purdue-university-growing-online-programs-enrollments.

3. At what point, do you transition the student from your marketing and communication to the institution's? What is the process?

Response:

The marketing and communication will be aligned with the University of Montana's existing brand and voice and will appear to be coming seamlessly from your institution; therefore there is no need to transition students.

4. Describe your preliminary marketing plan to target qualified students that are beyond the University's current reach.

Response:

Wiley Education Services' Marketing and Media teams engage in a holistic examination of market and program analyses allowing the formulation of a customized approach to media planning, campaigns, and projections specific to your institution's needs and goals. We use demographic and psychographic audience data from a variety of sources to build digital profiles for modeling and forecasts specific to your brand, locations, and programs.

Precision Marketing Plan Development

We work diligently to create unique value stories for each program, giving us the ability to accurately communicate your programs' key benefits and differentiators. Based on our market assessments and your program data, we can establish and

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execute a program-specific marketing plan that targets and recruits the right students for your institution.

To effectively reach your target audience we rely on a combination of tried-and-tested Customer Relationship Management (CRM) and inquiry-tracking systems, ready access to a pool of web domains, broad corporate relationships, and established media channels.
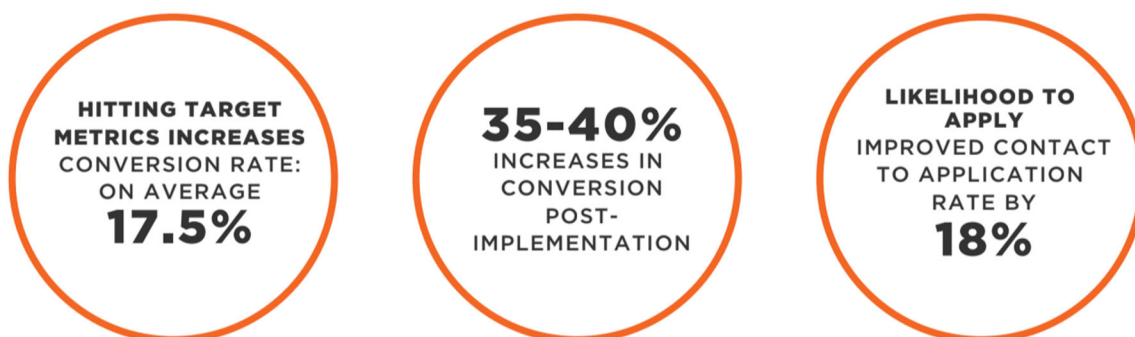
While marketing channels and powerful creative assets are important to marketing your programs successfully, it's the unique and targeted mix of channels and assets that deliver the results you need to perform well in an increasingly competitive marketplace.

Behavioral Analytics

Our Program Managers (admissions representatives) use our proprietary Behavioral Analytics software platform, plus research from similar programs, to generate a student "persona" for each program. Being armed with these cutting-edge tools and insights helps us better understand your prospective students. We know who they are and where they are, along with their needs, wants, and motivations for choosing your programs over others'.

Using in-depth linguistic algorithms, the platform analyzes student speech and behavior during telephone interactions to reveal key measures of success, including the likelihood that a particular student will enroll. Over time, behavioral analytics allows us to learn the strengths, skills, and preferences of students. This allows us to have personalized student conversations and to customize communications to optimize student experiences and outcomes. Wiley Education Services has made a significant investment in behavioral analytics technology and maintains exclusivity with our vendor to offer this to our partner institutions.

Wiley has implemented behavioral analytics at scale, with more than 3.5 million conversations recorded and analyzed. This has enabled the establishment of benchmarks for targeted performance metrics and predictive modeling on a student's likelihood to apply, enroll and persist. Coupled with directly informing coaching from Program Managers to prospective students, we've realized tremendous results:

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HITTING TARGET METRICS INCREASES CONVERSION RATE: ON AVERAGE **17.5%**

35-40% INCREASES IN CONVERSION POST-IMPLEMENTATION

LIKELIHOOD TO APPLY IMPROVED CONTACT TO APPLICATION RATE BY **18%**

5. Describe your ability to provide high-quality expertise in marketing areas such as search engine optimization, customer relationship management, etc.

Response:

Search Engine Optimization

Our team has deep relationships with Google, Bing, Facebook, and a host of ad tech players who populate the search and content marketing landscapes.

For example, through our long-standing partnership with Google, we work closely with them to identify and implement optimization enhancements to support our partners across an ever-evolving academic and marketing environment. Our services team meets with Google regularly to share information and best practices to elevate marketing tactics and maximize returns.

Direct connections, like those with Google, give us access to industry news and updates as well as a trusted cadre of service providers and vendor partners. These relationships are critical for keeping pace with constant changes to search algorithms, native ad formats, new measurement techniques and emerging platforms.

Multi-Touch Attribution (MTA)

We outlined earlier how Wiley Education Services has made a significant investment in a digital marketing intelligence platform to understand cross-channel attribution and optimize investments in online paid media. The analytics team has experience with detailed media and website tracking and a Bayesian attribution model to understand the impact of our media efforts. It has been important for us to be able to attribute value to offline channels, which is not as simple as digital-only, multi-touch attribution. We've tested both a smart TV household tracking and a modeled approach to understand the effects of TV on path to purchase and have experience weighing the pros and cons of different methodologies. The data that we gain from

MTA is used to refine our campaign allocations, tactics and targeting, and ultimately answer where we should spend advertising dollars differently for future efforts.

Media Mix Modeling

Media mix models (MMM) quantify the impact of each channel to the bottom line. We work with our partner institutions to build the most relevant models for their business. We will identify the appropriate advertising decay rates (adstock) by channel, as well as determine the most useful model form for the decisions we wish to support. This could range from regression models to econometric models to machine learning algorithms.

A/B Testing

A/B testing allows us to test specific hypotheses about how our media are performing in market, and the incremental impact those tactics have on relevant KPIs. We will work with you to continually test and learn to improve performance.

Customer Relationship Platform: Student Relationship Platform™(SRP)

Our innovative Student Relationship Platform™ (SRP) offers a 360-degree view of a student's progress, guiding success at every stage of the student lifecycle. SRP provides detailed insights into student performance and success using demographic data, real-time course performance, and more. This gives us the ability to intervene and provide students with assistance exactly when they need it, thereby improving retention and graduation rates.

This platform features a comprehensive set of components designed to guide success at every stage of the student lifecycle:

- **Marketing and Recruiting:** With so many institutions to choose from, prospective students expect a more personalized, interactive experience. Our SRP enables us to quickly respond to prospective students, leveraging a host of flexible tools that extend our marketing resources and connect us with students in a more efficient and cost-effective way
- **Admissions:** The admissions component tracks the progress of individuals or applicant populations by means of a configurable online tool. With the help of demographics and other attributes, we can automatically create personalized communications to engage potential students and increase their likelihood of enrollment
- **Student Success and Retention:** SRP provides an accurate measure of success by giving us the ability to select factors and weightings that correlate with success in a given student population. Performance, interactions with

advisors, financial status, life events, and more can be tracked to highlight at-risk students. As well as flagging risk, these profiles can be used to support students at the first sign of difficulty and improve their results.

- **Enrollment Support:** Using our SRP, we can determine who is most likely to enroll if accepted, giving us the opportunity to allocate resources to improve retention. The more applications submitted, the more accurately we can predict enrollment outcomes

6. Describe your ability to inform the University in situations where digital marketing might trigger a State Authorization requirement.

Response:

In order to expand your online offerings, we will work with you to explore available marketing opportunities and the regulatory environment. Factors such as externships and practicums can trigger a physical presence in states where you may not have previously had one. Furthermore, certain programs require more than state authorization. We will help you understand the time and financial investment required to acquire these additional authorizations as part of our effort to maximize your online proposition.

We will work with partner institutions to provide research and recommendations to ensure compliance with state authorization requirements. Wiley and the partner will collaborate together to understand the full requirements of each state, and will come to agreement on a strategy to support the filings within each state. The partner institution will be required to approve such strategies before any correspondence filings are made. All document submission and fees or payments associated with each individual state will be the responsibility of the partner institution. Wiley does not provide support for programmatic-level state authorizations.

We believe that University of Montana is part of SARA. If that is the case, the university should have access to every state, with the exception of California, and a small set of islands in the Pacific (CNMI). If that is true, there's may be no need for any help beyond working with the state of California, and in the case of California the university would have to decide between pursuing authorization or not.

7. Describe your company's plans to ensure that university approval is secured for all marketing collateral to include: marketing messages, approval of marks, and approval of distribution plan.

Response:
We will work with your team when developing collateral to adhere to your unique brand style and values, thus preserving the traditions and prestige of your

institution. We see ourselves as your brand champions and recognize collaboration is key to a successful partnership. As such, all creative assets produced will align with the look, feel, voice, and tone of your institution. With this in mind, we will work with you to create all marketing assets and materials to support each of the degree programs identified within your portfolio. Prior to launching any marketing collateral, it will be presented to you for feedback and final approval before going live.

8. Describe in detail your company's approach to recruiting from initial point of contact through admission and program start.

Response:

Wiley Education Services offers support services from the moment a prospective student inquiries about a program to the point that they are admitted. Our high-touch recruitment process is designed to track each prospective student while also providing the student with high-quality support at each step.

During this process, leads move through three areas of Recruitment Services: the Contact Center, the Recruitment Center, and the Application Center.

Contact Center: To ensure that potential students are qualified and being directed to the appropriate program right from the start, all incoming leads are routed to our Contact Center via a proprietary lead routing mechanism that is integrated with our Student Relationship Platform™ (SRP). Members of this team are 100 percent dedicated to responding and reaching out to new inquiries to make contact quickly and move qualified leads on to the Recruitment Center.

Recruitment Center: Once a Contact Specialist has determined a lead is qualified, they are immediately transferred to the Recruitment Center to speak to a Program Manager (or, if the prospective student is unable to speak at that time, the specialist will schedule an appointment). Program Managers are dedicated experts on specific partners and sometimes specific programs, and are trained in talking to potential students about their motivations and goals and determining whether the program will help them achieve them. Program Managers also use our Behavioral Analytics technology to facilitate better communication and engagement with potential students. Once a potential student decides to apply to a program, the Program Manager passes them to the Application Center for dedicated and expert support with this stage of the process.

Application Center: At this stage, Application Managers help students get their application paperwork done and to gather coordinate other required materials,

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such as transcripts and referrals. They also conduct student orientations and assist with course registration. They stay in constant contact with applicants and admitted students prior to the start of the program, helping them navigate the application and admissions process and providing encouragement and support during this sometimes stressful period. This also helps with retention if there is a longer period between admission and the start of the program. Once students actually begin the program, Retention Services takes over.

9. Provide supporting statistics to illustrate your success, such as typical yield (i.e., percentage of offers of admission that result in matriculation) for institutions similar to the University of Montana.

Response:

Wiley Education Services tracks a number of different metrics along the entire student journey to measure success of our partnered efforts. The definition of 'success' can vary across programs and partners. We work with your program leadership during the startup process to understand what metrics will best indicate partnership success for your program(s).

Because Wiley only targets students who are the "right fit" for individual programs, we typically do not have a large amount of fall-off from accepted students. We work with students up front in our extensive admissions processes to determine best fit for the program. We then work with them over time to prepare to apply and start. This includes helping clear all hurdles and obligations that present themselves over that time period (financial, transcripts, etc.). Where we see students self-select out of the process, it typically relates to a last-minute life issue, a competitive acceptance, inability to meet a financial obligation, or something similar.

Across all our partnered programs, we typically see 80 percent or more of accepted students start their programs. That number can be higher depending on the individual institution and program attributes.

10. Describe your ability to maintain contact with prospective students through the recruitment and enrollment process.

Response:

As described above, from the moment a prospective student inquiries about a program, members of our Recruitment and Enrollment Services teams are building a relationship with the student. We provide an end-to-end application and enrollment process for prospective students, working to keep them connected with your institution through multiple channels: click-to-chat, telephone, mobile click-to-call, instant message, and 100 percent online applications. Students can also book appointments with our team online through our Web Appointment Scheduler.

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All data is captured in our customer relationship management (CRM) system, including any data from your own systems, as per a previously agreed upon data integration plan. Our Student Relationship Platform™ (SRP) records and monitors activity throughout the student lifecycle, providing a window into the enrollment process.

11. Describe your company strategies for and evidence of success in marketing and recruiting regionally, nationally, and internationally. Provide supporting statistics to illustrate your success.

Response:

Wiley recognizes the influence that geography plays in recruiting students. While brand affinity plays an important role in regional markets, recruiting beyond the local area is vital. In addition to supporting localized traditional tactics like outdoor advertising and radio, Wiley utilizes a proprietary campaign naming taxonomy that differentiates local, regional and national digital campaigns based on the prospects' proximity to the campus. Connecting the geographic data to prospective student records within the CRM allows us to do national bidding for media campaigns (while accounting for geographically based diminished returns) instead of only focusing on a single local area, enabling us to carefully, and efficiently, expand the campus footprint.

Regional-based recruiting should also be considered on a program-by-program basis. While a generic program like a non-specialized MBA will be highly geo-sensitive, select programs that can be differentiated against national competitors will be able to reach a national audience more efficiently.

While every brand will react differently, Wiley models indicate drop-offs in lead-to-start conversion rates of 23 percent from local to regional, 27 percent from regional to national, and an additional 62 percent moving from domestic to international. International recruiting is particularly sensitive to the institutional brand, program type, and country.

12. Provide any available statistics on the graduation/completion rates of students in academic online programs for which your company provides marketing and recruitment services.

Response:
Completion and graduation rates vary across programs, program types, and partners, and are highly dependent upon:
- Program entrance criteria and/or prerequisites
- Program rigor
- Time required to complete

- Level of student success support provided

To illustrate the variation across programs and what might be a typical rate for an online program from the University of Montana, we provide an example below from a program that is supported in partnership with a large state institution. This institution's maximum time frame for degree completion is five years, so we track three-, four- and five-year graduation rates to ensure completions are measured over the appropriate timeframe. This also helps account for multiple cohort completions, any students that may have taken longer, and switched cohorts.

Sample of a three-year completion rate across three online programs from a large state institution

	3-Year Grad Rate
Program 1	73%
Program 2	85%
Program 3	74%
Total	77%

Graduation or completion rates can also be highly dependent upon your own online program entrance criteria. For example, if a program has an open enrollment program and has little or no requisite entrance criteria, you might anticipate slightly lower rates of student completion.

It is important to note that the Wiley Education Services team also closely tracks term-over-term retention of students. This provides early indication of how students are engaging with and performing in a program as they move towards completion. This allows us to intervene early should program retention issues arise. We can provide regular reporting on that metric upon request.

13. It is very important that marketing and recruitment efforts be appropriate for public higher education and support the academic reputation and vision of the University of Montana. Describe the checks and balances you have in place that safeguard against hard-sell or high-pressure tactics.

Response:

At Wiley, we see ourselves as your partner supporting your mission. We are dedicated to attracting qualified, quality applicants, while maintaining the integrity and prestige of your institution. We recognize that protection and accurate representation of your brand is paramount as we develop experiences that reach, inform, and equip students with the information they need to take action from

marketing messages to the way our Program Managers speak to individual leads about your institution programs.

In addition, our focus on finding students who are the right fit for UM-Missoula and Missoula College precludes us from taking on anyone who we feel would not thrive in the program or benefit from it.

14. Describe your plan to avoid direct competition for leads among your institutional partners.

Response:

Through a combination of Wiley's student recruitment team structure and our approach to inquiry management, we are able to manage the confidentiality of leads so that they are not shared beyond the program where the lead originated.

15. Identify the process(es) by which the company, to the extent it partners with other similar entities (institutions of higher education), resolves any potential conflicts of interest.

Response:

We do not believe there is a conflict of interest with any of our existing or prospective partners. We engage with each partner as an individual entity, with a set of resources focused on recruiting and retaining students for each partner. All student information is digitally protected and we never share student inquiries between partner teams.

We offer no online or ground-based education outside of our commitments to our private or public university partners. We are not a part of an online university or a holding company that owns, in whole or in part, an online university; therefore, we do not anticipate any conflicts of interest.

D. Enrollment Management and Student Retention

1. Describe your process for assisting the University in managing enrollment in online programs and how you would address the following areas:

   a. application process

Response:

To date we have worked with more than 60 partners, establishing optimal business processes and workflows to support the needs of students throughout their student journey.

We treat every one of your students as an individual. From the moment a prospective student inquires about a program, members of our Recruitment and Enrollment Services teams are building a relationship with the student. We provide an end-to-end application and enrollment process for prospective students, working to keep them connected with your institution through multiple channels: click-to-chat, telephone, mobile click-to-call, instant message, and 100 percent online applications. Students can also book appointments with our team online through our Web Appointment Scheduler.

All data is captured in our customer relationship management (CRM) system, including any data from your own systems, as per a previously agreed upon data integration plan. Our Student Relationship Platform™ (SRP) records and monitors activity throughout the student lifecycle, providing a window into the enrollment process.

The SRP has been engineered to seamlessly integrate with your enterprise systems, aggregating disparate sets of data and automating repetitive tasks, while simultaneously letting your teams engage directly with students to address their needs.

The SRP online admissions component is highly configurable, allowing you to track applications from admission to selection, resulting in higher student engagement and increased likelihood of enrollment. Unique admissions forms and workflows can be used for each University of Montana institution, program, etc.

A basic representation of the Student Enrollment Process can be found below, with additional details regarding each step in our comprehensive process.

- **Qualifying Students:** Our goal is to recruit students who meet or exceed your criteria, using our experience to identify a target student profile, with appropriate admissions criteria and materials, to fit your particular program(s). By personalizing our interactions with your students, they will feel they are communicating with your institution.
- **Application Completion:** Students who meet the required admissions criteria, are motivated, and have the necessary funding are encouraged to apply. We will partner with you to determine the exact process by which

applications are handled for all students, including those you have already identified for special consideration.

- **Data Input of Application Information:** As admissions documents are received, our recruitment team updates your system's student records, relieving the burden from your staff. Some institutions, however, choose to do this themselves upon receipt of completed application files.
- **Application Submitted for Partner Review:** We send the completed hard copy application file to your institution for admissions review. Many institutions prefer to receive an electronic copy and a hard copy of the completed application file. We also offer an online portal where you can review files and relay admissions decisions. We will work closely with you to customize the process so it works for your institution.
- **School Renders Admissions Decision:** Upon receipt of the application file, you will be able to review it and make an admission decision. Though we are not involved in this process, we inform students verbally whether or not they have been admitted. Subsequently, you can award any applicable financial aid based on the student's eligibility.
- **Course Registration:** We help each student process their registration, finalize payment or funding, order books, and prepare for orientation ahead of classes. To ease student anxiety around technology and online learning, New Student Orientation is provided using your approved content.

  b. communication plan

Response:

As outlined above, we have regular points of contact and have set up proven processes with our partner institutions during the enrollment process. The Partnership Director also monitors any issues during the process and can work with you to adapt the steps to the University of Montana's needs and processes as necessary.

  c. academic calendar

Response:

During the development and planning process, we will work with you to determine the academic calendar for online courses, including the length of courses, intake quantity per year, sessions/semesters, etc., while also making sure that this calendar aligns with your academic calendar for on-campus programs.

  d. payment processes and deadlines

Response:

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During course registration, our Enrollment Services team will help each student process their registration and finalize payment or funding. While our team can communicate the University of Montana's processes and deadlines in a proactive and timely manner, the ultimate responsibility for managing this area lies with the University.

      e.   Training

Response:

Our team members will want to be trained on your systems, processes, and programs so we can fulfill our mission as a full partner in supporting your goals. At the same time, we'll train your people to understand how you engage with students, identify and communicate areas of responsibility, and specify handoff points so that everyone is in alignment.

      f.   overall streamlining of the enrollment process.

Response:

As outlined in sections C.8 and D.1.a, Wiley Education Services has put an integrated process in place to serve students from inquiry through program start, including enrollment. This process not only ensures that enrollment is streamlined and efficient but that each student is treated as an individual throughout, with the necessary support at each step.

2.   Describe how your company ensures that once enrolled in an online class or degree program students are provided with essential support for individual classes and overall progress to degree completion.

Response:

Our support services don't end when students complete enrollment. When the program starts, your students are connected with a Student Services Coordinator (SSC). As well as maintaining a relationship with the student until graduation, the SSC works closely with your institution to identify and create specific workflows and processes to address the student's needs while complying with your standards.

As the first-line contact for students, the SSC monitors course participation and provides proactive student outreach to address potential problems early. The SSC is also the first port of call for technical assistance and are committed to resolving any technical and student support issues in collaboration with the 24x7 Personal Support Center team.

By working with your team and becoming immersed in your institutional goals and traditions, your SSC becomes a fully integrated extension of your retention services team.

Depending on the agreed-upon processes and workflows, your SSC will also:

- **Collaborate with faculty and staff.** Collaborating with the Program Directors and faculty helps SSCs to create a seamless process for working with and resolving student issues.
- **Conduct activity and performance monitoring.** The SSC monitors student activity and performance in the Learning Management System, analyzing problem areas, determining solutions, and conducting intervention activities and processes.
- **Deliver proactive reminders.** These include term-over-term reminders via phone and email regarding start dates, books, and financial aid requirements.
- **Apply early intervention strategies**. SSCs identify incoming students who might need more support, reaching out to them to ensure they feel supported and are fully aware of the resources available.
- **Customize problem resolutions.** They identify and promptly resolve student concerns through coaching, tutorial remedies designed to improve student retention, and other strategies to meet campus benchmarks and goals.
- **Conduct ongoing outreach and engagement.** SSCs coordinate with faculty to develop and execute proactive outreach and communication strategies to keep students engaged, with particular focus on students who take time off from their program, to ensure they are able to re-enroll when ready.
- **Deliver marketing and communications**. These tasks include coordinating marketing programs and mailings, actively participating in development activities to promote student awareness, retention, and success, and delivering salient institution/program information.
- **Provide customer service and tech support.** SSCs are responsible for handling incoming student service-related questions or concerns, eliminating delays that impede student success.
- **Support monitoring and reporting.** They track activities to completion using our proprietary student management system, providing regular activity and audit reports, and maintaining documentation of outreach services and other reporting tools.

SSC activities and communications are tracked using our SRP, which is used to coach our SSCs and personalize our services, helping us maintain positive retention outcomes.

3. Describe how your company measures student achievement and success in programs and provides available information to the University.

Response:

The student tracking we manage through our Student Relationship Platform provides an accurate measure of success by giving us the ability to select factors and weightings that correlate with success in a given student population.

This console can be integrated (batch or real-time, one-way or two-way) with existing learning management and student information systems to create a unified data set, offering an even more holistic view of your students.

4. Identify your processes for insuring student retention including:

    a. helping students who are having academic difficulties find institutional support services

    b. helping students meet registration deadlines

    c. identifying and assisting students who appear to have dropped out of online classes or degree programs.

Response:

As outlined above, our Student Services Coordinators (SSCs) are constantly monitoring students and can proactively reach out to students who are having academic difficulties. The SSC can then point them toward specific support services or assistance provided by the University.

Performance, interactions with advisors, financial status, life events, and more can be tracked to highlight at-risk students. As well as helping to flag risk, these profiles can be used to support students at the first sign of difficulty and improve their results. For example, we can use SRP to trigger a workflow of an automated action, such as sending an email to a student on a set task and instructions for an advisor to call the student immediately. SRP also alerts the SSC if a student misses a registration deadline or is no longer engaging in a class and prompts him or her to contact the student.

5. Describe how you would integrate data and streamline processes to effectively administer enrollment and retention services.

Response:

Data from our Behavioral Analytics software, described in detail earlier in this proposal, helps our Program Managers communicate effectively with prospective students during the recruitment process. These same insights, plus additional information gained during recruitment, also inform the way in which we tailor the

support strategies for Enrollment Coordinators and Student Success Coordinators once students are enrolled.

6. What kinds of enrollment information will your company be able to pass to and/or from the University's Student Information System (Banner) and Learning Management System (OpenLMS/Blackboard)?

Response:

Wiley Technology and Enrollment team members are well versed in a variety of student information systems and learning management systems and will work closely with you to ensure a seamless application and enrollment process.

7. What services does the company provide to help with its career services for online students?

Response:

Wiley Education Services has participated in public-private partnerships with some of our partner institutions, which can serve as a way to deliver online learning to current employees as well as serve as a potential path to internships or jobs for existing online students.

8. What services does the company provide for online proctoring?

Response:

We do not provide online proctoring, but we do work with multiple online third-party online proctoring companies and can make sure that we match you with the one that meets your needs.

9. What services does the company provide for online advising?

Response:

As noted previously, the Student Services Coordinator (SSC) serves as the first point of contact for students seeking additional support, including advising. The SSC can connect the student with the University's resources in this area.

10. Describe your process of working with existing student support and retention services. Provide examples.

Response:

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If the contract is awarded to us, at the beginning of the partnership Wiley Education Services team members will work with your teams to learn about existing business processes and identify opportunities to partner, augment or work in parallel on student support and retention services. In many partnerships our Student Services Coordinators (SSCs) work in collaboration with an institution's existing student support and retention services. In some cases, responsibilities may be divided so that Wiley team members solely support the online programs that are part of the partnership. In other cases, the Wiley team may provide incremental student support and retention services to an institution's on-campus programs that are not part of the online program portfolio. Our flexible approach to partnership and planning is designed to help identify these needs and establish collaborative partnerships in the best interest of the partner institution and its students.

E. Program Design, Development and Implementation

1. Faculty at the University of Montana are covered by two collective bargaining agreements that cover a wide range of employment related processes and procedures. For instance, the University of Montana will retain authority over faculty hiring decisions. Describe your experience working with institutions where faculty and/or instructors are covered by a collective bargaining agreement.

Response:

Wiley Education Services' policy is not to interfere with faculty hiring decisions. The recruitment, hiring, and retention of faculty is a wholly academic matter, much like the creation and maintenance of program curricula, and those are venues that Wiley recognizes as being wholly owned and managed by university faculty. The university determines its own faculty mix, and is solely responsible for enforcing its own faculty governance and faculty policies. At present, Wiley partners with a variety of outstanding colleges and universities where faculty are covered by a collective bargaining agreement.

2. Faculty at the University of Montana play a significant role in institutional governance. Specifically, faculty review, oversee, and approve all curriculum. Describe your experience working with institutions where faculty play a substantial role in the shared governance of the institution.

Response:

Faculty presently play a substantial role in shared governance at the vast majority of colleges and universities that partner with Wiley Education Services. Faculty at the university are wholly responsible for the review, oversight, approval, and maintenance of all program curricula. In addition to the curriculum being owned and maintained by the university, Wiley also recognizes that the university ultimately owns admissions, program instructions, and final decisions related to satisfying course components and therefore graduation.

3. Identify how you will cooperate with the relevant departments and units to ensure that they retain decisions over the hiring of faculty and instructors when program growth is substantial.

Response:

As online programs grow, universities typically continue to hire new faculty to develop courses for and/or teach courses in said programs. As noted above, Wiley recognizes that the recruitment, hiring, and retention of faculty is a wholly academic

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matter that is owned by the relevant departments and academic units at the university.

4. Describe the faculty support provided in instructional design, course development, and research informed practices in online teaching and learning.

Response:

Wiley Education Services' award-winning instructional design team will work hand-in-hand with faculty to understand the unique student journey and create distinctive, high quality learning solutions which reflect the unique culture of your institution. Our goal is measurable student engagement achieved through a combination of authentic project work, compelling content, peer engagement opportunities and leadership and support from instructors. We are dedicated to the highest student satisfaction and completion rates and are prepared to empower and support faculty with achieving their vision for learning.

We believe close collaboration between subject matter experts (Faculty Developers) and Learning Designers is the key to designing effective and engaging online learning experiences. Initially, we will work with you to ensure that the University of Montana's distinctive pedagogy is defined, and we will determine how best to translate this instructional philosophy to the online medium. We strive to incorporate unique elements of your instructional philosophy into a customized online format, whether they focus on ensuring that your students have an opportunity to be agents of change, perform action research, utilize experiential learning, or participate in a community of inquiry.

Our efforts are guided by the following process:

Underpinning course development and key to the process is our **Course Quality Framework** which consists of three primary categories:

1. Structure analysis
2. Student-faculty engagement analysis
3. Technology analysis

The following is meant to highlight various services and support provided by our Academic Services team as part of any program planning and course development

process with our partners.

Program Planning	
Plan Development	Engage with faculty, program leadership, and the administration to establish a program plan that includes program goals, along with the development of strategies to accomplish those goals, and to align expectations around the teaching and learning experience. Component areas of the program planning stage: • Institutional Pedagogy • Curriculum Mapping • Assessment Plan • Teaching Standards • Technology Approach • Course Design Convention • Student Feedback Strategy • Student Orientation Program • Faculty Training & Development

| Course Development	
Base	Design and development of a course designed to meet learning outcomes, represent the program's distinctiveness, and fully engage learners. Course comprises 3rd party and original content, learning activities, formative and summative assessments, peer collaboration elements, and faculty presence elements.
Additional Development	Dynamic components including, interactives, third-party technologies, game development, VR, etc.

Course Management	
Term Set-Up	Cloning and Enrollment of sections, rest of gradebook and due dates, QA check.
Course Re-format for LMS Migration	Revision and transfer of courses to ensure proper function and effectiveness in new LMS. Includes review of system configuration, course level settings configuration, mapping of content from "home" LMS to "destination" LMS, project management, and porting of all elements to new system.
Media Development & Video Production	
Media Packages	A variety of media packages are offered to meet the specific needs of each institution. Each encompasses the development of media strategy, planning, and production of course elements to include a mix of graphics, complex and/or simple interactive activities, and video of various types. The complexity and amount of media developed differentiate each package.
Interactive Development	Custom design and development of learning games, interactive graphics, infographics, etc.
Video Production	Video production as stand-alone service to meet course need. Includes light consultation on strategy.

Faculty Support for Online Course Design and Teaching

Wiley has extensive experience training and supporting faculty at all levels. We work with partners in a wide variety of instructional approaches and focus on the desired program structure and corresponding instructional models to achieve mutually defined and desired outcomes. We believe in the importance of a rich learning environment and have extensive resources to support that belief, all while partnering with your institution's desired approach. We view it as our responsibility to demonstrate best practice, respond to the desires of the institution and faculty, and create a customized structure that works.

There are two formal learning opportunities that anchor our efforts:

1. **Course Design training.** We offer a self-paced Online Course Design module for faculty who have never designed an online course or worked with an instructional designer. The course uses authentic scenario-based activities and provides an extensive resource library for faculty to use as a reference when they begin their online course development work.
2. **Teaching Strategies training.** In programs where new, adjunct faculty are regularly rotated into the teaching schedule, we have a facilitated asynchronous Online Teaching Strategies course that focuses on evidence based online practices and allows faculty to experience what it is like to be an online student, learn tips on increasing student engagement and motivation to improve retention, while sharing and learning with their peers. We have also developed more compact webinar-style orientations for new faculty and adjuncts, customized to specific needs.

Example of Online Teaching Strategies Course
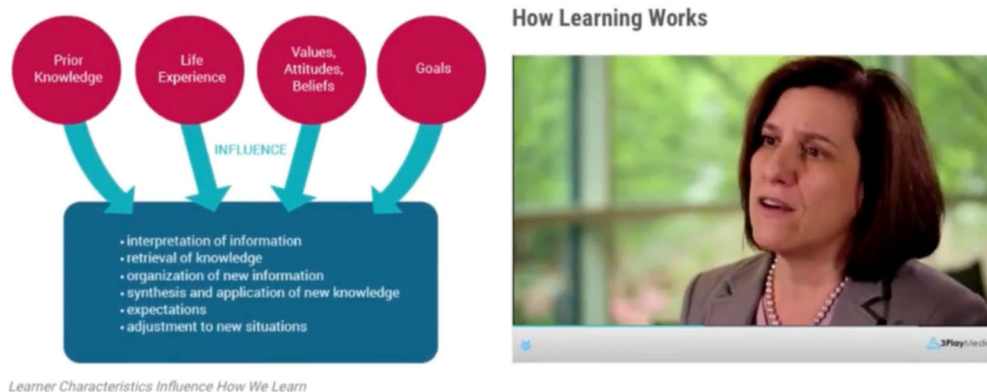
In addition to these core offerings, we have led workshops and webinars on rubrics and assessment, managing group work online, designing and facilitating effective online discussions, managing larger online classes, and integrating emerging technologies, among others specific to our partner needs. To support community of practice among faculty, we love to showcase existing program courses so that faculty can learn from and support one another in their effort to continually improve their courses. As programs scale, we strive to continually assess needs so that we stay a step ahead of the training and support requirements.

5. Provide details of staff experience, qualification, and times of availability for faculty support.

Response:

Wiley's Academic Services team is made up of more than 60 professionals working with all of our partners and has successfully designed and developed over 1,700 courses and 113 programs, in such disciplines as legal, nursing, engineering, education, business, and many others. Approximately 85 percent of the courses we've developed are at the master's and doctorate level, but we have developed courses at all levels, both in degree and non-degree areas.

Team Structure

Our Academic Services team structure includes the following roles for each program. At a minimum, a Program Strategy Manager, Learning Designer, and Learning Technologist will work directly with your faculty and curriculum leads. Depending on the breadth and depth of content and rich media needed for each, the team working with your faculty may be larger.

PROGRAM DESIGN

Rachel Carton — Program Strategy Manager
Bill Cochran — Multimedia Design Manager
James Nanasy — Sr. Learning Technologist
Renee Myers — Learning Technologist
Bill Simantirakis — Learning Technologist

LEARNING DESIGN

Esha Khurana — Learning Designer
Caralyn Sheehan — Learning Designer
Dolly Lemke — Learning Designer
Liz Hildreth — Learning Designer
Tracey Rossi — Learning Designer

LEARNING DESIGN & COURSE PRODUCTION

Jeanne Kim — Sr. Learning Designer
Heather Brown — Learning Designer
Jonathan Powell — Web Developer
Roger McMullan — Visual Designer
Jen Tabor — Video Producer

VIDEO PRODUCTION

Tommy Grevlos — Video Producer
Dan Ramos — Video Producer
Rachel Ruiz — Video Producer
Dustin Elkin — Video Editor
Andrew Dworak — Video Production Specialist

During the program planning, design, production, and implementation process, these team members will work closely with your faculty members and instructional designers. Our Academic Services team is dedicated to meeting partner needs for faculty support on an ongoing basis.

6. The University maintains the accessibility standards outlined in the University of Montana's Electronic and Information Technology Accessibility (EITA) Policy and Procedures and in the University of Montana's 2014 Resolution Agreement with the U.S. Department of Education Office for Civil Rights. Describe your company's ability to meet the accessibility requirements outlined in these documents. Provide details of staff experience and qualifications in the area of accessible online course and program design.

Response:

We will ensure that all online courses and content meet Section 508 and other federal and state accessibility guidelines.

All courses are designed to meet accessibility expectations in accordance with your institutional policy. This includes attending to issues related to color, contrast ratios, accommodations related to timed assessments, and providing equivalents for visual and auditory content.

We coordinate all captioning and interactive transcripts for streaming media. Our Personal Support Center and Student Services Coordinators are also familiar with various assistive devices, such as screen readers, and we will work with your office

of student services and disability resource center to ensure the accommodations for students are enacted.

7. Describe how your company's instructional design and development team will work with the existing instructional design and development team at the University of Montana.

Response:

As part of our partnership planning process, the Wiley Education Services Academic Services team will work closely your existing instructional design and development team to identify need, roles and responsibilities.

Our approach is detailed below and guided by the following process:

Wiley Academic Services Process
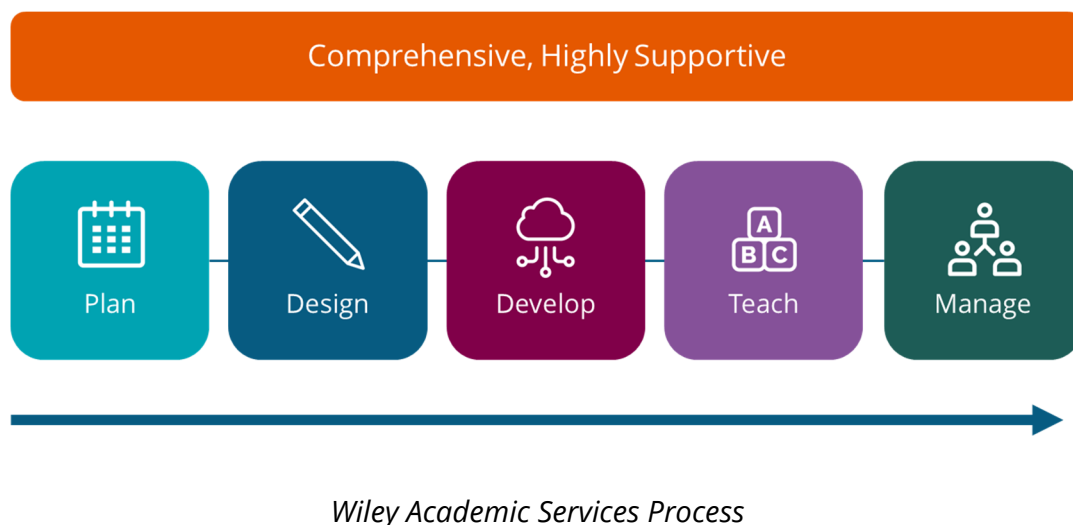
1. Programmatic, learner-centered focus from the outset
2. Collaborative, iterative instructional design process
3. Full-service production capability
4. Term-to-term course setup and version management
5. Survey administration and consultative revision process
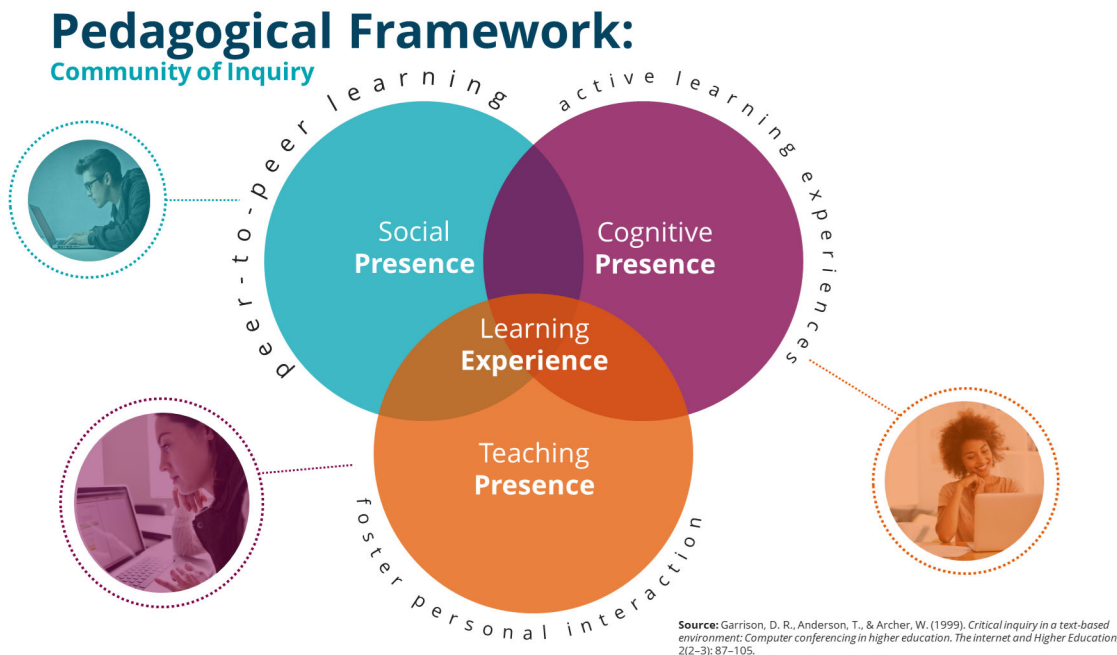
Program Planning

Program Planning is the first step in the program development process and it is crucial to developing a quality academic experience. During program planning, we engage with faculty, program leadership, and the administration to establish program goals, develop strategies to accomplish those goals, and to align expectations around the teaching and learning experience. We will assign a Program Strategy Manager (PSM) to partner with you to create a shared vision for

the program and outline the steps necessary to bring that vision to fruition. From an institution's standpoint, the program planning process is led by the program director who may involve key faculty for additional input. The following are the component areas of the program planning stage:

- University's Pedagogy
- Curriculum Mapping
- Assessment Plan
- Teaching Standards
- Technology Approach
- Course Design Convention
- Student Feedback Strategy
- Student Orientation Program
- Faculty Training & Development

Course Design

Our goal is to work collaboratively with your faculty and program leadership to create engaging and effective online learning experiences. Initially, we will work with you to ensure that your University's distinctive pedagogy is defined, and we will determine how best to translate this instructional philosophy to the online medium. We strive to incorporate unique elements of your instructional philosophy into a customized online format, whether they focus on ensuring that your students have an opportunity to be agents of change, perform action research, utilize experiential learning, or participate in a community of inquiry. Additionally, we collaborate with faculty to translate their priorities, such as stressing the interdisciplinary nature of the curriculum, focusing on reflection opportunities and outreach, etc. In essence, this translation of what it means to learn as and be a student at the University of Montana is the starting point for our instructional design.

Pedagogical Framework:
Community of Inquiry

Source: Garrison, D. R., Anderson, T., & Archer, W. (1999). *Critical inquiry in a text-based environment: Computer conferencing in higher education. The internet and Higher Education,* 2(2–3): 87–105.

Consistent with our collaborative approach, Wiley adheres to a flexible course design methodology founded in the principles articulated in the Community of Inquiry framework. The Community of Inquiry promotes a student-centric and outcomes-driven learning experience and requires an analysis of structure, content, student and faculty engagement, as well as technology. It allows faculty and our learning designers to ensure that we're attending to instructional presence, cognitive presence, and the extremely important social presence in courses. We've also developed a Wiley Course Quality Framework to guide designers and faculty as they work and to provide a checklist for quality assurance.

Course Production and Implementation

During the Course Development Process, a Faculty Developer's main and ongoing point of contact will be the Learning Designer. However, there is always a team of professionals supporting the entire process, some of whom may have occasional contact with the developer. Below are the primary responsibilities of the Learning Designer and the Faculty Developer.

Title	Primary Responsibilities
Faculty Developer (FD)	- Participate in the Kick Off call and regular review sessions with the LD - Collaborate with the LD to plan the course design - Provide instructional materials for online learning - Deliver the weekly content according to the agreed timeline - Partner with LD to iteratively refine the course content and design - Conduct a final review of the course - Respond to review items from other stakeholders as needed - Participate in the development of multimedia assets for the course
Learning Designer(s) (LD)	- Schedule the Kick Off call and regular review sessions with the FD - Guide and collaborate with the FD to plan the course according to online course design best practices - Review and provide feedback to ensure outcome alignment - Recommend appropriate technologies to promote student learning - Collaborate with Media Team on multimedia elements - Partner with FD in iterative refinement of course content and design - Conduct a final review of the course - Respond to review items from other stakeholders as needed

8. In line with Article 14 of the University of Montana and Missoula College's Collective Bargaining Agreements, the University and Faculty will retain intellectual property rights over content. Identify the processes by which the company protects intellectual property.

Response:

Our partnership agreements specify that intellectual property generated from the course development between Wiley Education Services and the partner institution is governed by the institution's policy. Wiley claims no ownership of course content generated from the development process, with the exception of technology and code we develop to display and afford interaction with content.

9. Describe how faculty intellectual property rights are affected (if at all) in situations where content development is supported by OPM design staff such as: video, animations, interactive media, web-based apps, etc.

Response:

The university—and therefore the university faculty—retain intellectual property rights over all content. This applies not just to content that a faculty member creates on their own or with university resources—it also applies to all content that is in partnership with Wiley Education Services staff (learning designers, video producers, graphics artists, etc.). The faculty retain intellectual property rights over all course

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content, course components, and course media utilized in Wiley-partnered programs.

10. Describe how round-the-clock technical support for students and faculty delivering online content will be provided.

Response:

We want students to feel confident about their education at all times. Technology is an important part of delivering this, but it is not everything. As online technology advances, the delivery of academic coursework, online student support services, and staff knowledge, must also advance in order for the technology to meet student needs.

We provide a team of highly skilled service professionals, with a deep understanding of your institution and programs, giving them the insight to deliver guidance when and wherever your students need it most.

Every conversation with our support team is tailored to support the individual, whether that is assisting with homework, software troubleshooting, or confirming course registration.

One-to-One Support: Personal Support Center

Our Personal Support Center team is committed to creating rewarding experiences for students, faculty, and staff. This means responding to the demands of the non-traditional schedules of online study and the personalized needs of remote students, making 24x7 technical and academic assistance a crucial asset.

Our Personal Support Center professionals are available via telephone, email, or click-to-chat. We will provide your institution with a toll-free number, branded to your institution. Every student interaction is tracked on our customized case management system. Using this information, we can work with you to identify any negative impact on student study experiences and implement appropriate solutions.

Faculty Support

Should your faculty experience any hardware, software, or access issues during the live course, they get immediate support via our 24x7 Personal Support Center.

If faculty encounter any issue with course content, or need non-time-sensitive course set-up support, they are encouraged to email our academic services team directly via a unique partner email group. This email account is monitored

throughout business hours, and follows an Academic Support Communication Protocol, as detailed in the example below:

- Email received at [email address TBD]
- Faculty receive an auto-reply
- Our team acknowledges issue and initial priority in reply
- We investigate the issue
- We resolve the issue
- If the issue cannot be resolved quickly, we will send a status update with an estimated resolution time (or next status update), plus a work-around solution if applicable
- We test/verify the issue has been resolved
- We reply to faculty email with resolution

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F. Technical Infrastructure

The University will retain management and control over its technical systems, but will consider integrations as needed.

1. Describe the technical infrastructure and provide a topology map that shows the services your company provides in: market research, marketing and recruitment, student enrollment management and retention, program design, development, delivery, implementation and evaluation.

Response:

Marketing and student recruitment are a series of applications running on Amazon Web Services (AWS) and Heroku. Wiley Education Services provides both a full-blown CMS solution as well as a top-of-the-funnel recruitment platform called Ranku. (Please find more information about Ranku at the end of this proposal). Together, these are designed to capture Requests for Information (RFIs). Student enrollment management and retention are handled by our Student Recruitment Platform (SRP) which is a Salesforce application. Using (HTTPS POST) WebToLead, the CMS, as well as Ranku are integrated with Salesforce in real time. Program development, delivery, implementation, and evaluation are covered by an ecosystem of tools referred to as Engage running on AWS and Heroku. Engage is comprised of an LMS, a series of LTI Tool Providers, a video streaming service (Engage Video), and an ePortfolio (Engage Portfolio).

Wiley Education Services Portfolio

MARKET ASSESSMENT	PROGRAM DESIGN & DEVELOPMENT	MARKETING & BRAND MANAGEMENT	RECRUITMENT	ENROLLMENT MANAGEMENT	STUDENT RETENTION SERVICES	24X7 HELPDESK
MARKET RESEARCH & ANALYSIS	PROGRAM PLANNING	FULL SERVICE AGENCY	BEHAVIORAL ANALYTICS	ENROLLMENT COORDINATION	ORIENTATION	STUDENT TECH SUPPORT
MARKET STRATEGY & INSIGHTS	INSTRUCTIONAL DESIGN	CHANNEL STRATEGY	HIGH TOUCH STUDENT ENGAGEMENT	COURSE CAPACITY PLANNING	PROACTIVE MONITORING & OUTREACH	FACULTY TECH SUPPORT
PROGRAM SELECTION	FACULTY TRAINING & SUPPORT	CREATIVE & CONTENT	TARGETED RECRUITMENT	POLICY & PROCESS ADHERENCE	"LIFELINE" FOR STUDENTS	ISSUE RESOLUTION
	ONGOING IMPROVEMENTS	ANALYTICS & REPORTING	ROI OPTIMIZATION	DATABASE & REGISTRATION MANAGEMENT		

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2. Identify the access needed to University systems associated with students and online learning:

   a. Student Information System – Banner

   b. Learning Management System – OpenLMS (Formerly Moodlerooms by Blackboard)

   c. Retention and Planning Services – Starfish

Response:

Depending upon the needs of the University, Wiley Education Services can receive data from Banner, OpenLMS, and/or directly from Starfish to our Student Relationship Platform (SRP) and our teaching and learning products. This data can be delivered in batch, as a series of regularly occurring extracts via SCP/SFTP, or via our secure API endpoints in real time.

3. Describe the data transfer requirements that will be needed in order to ensure effective services in the areas listed above, including the format of the data required from the university, the frequency and mechanism of the data transfer, the security you will use to safeguard the data transfer process, and the management of integration and data sharing between public sites and internal data sources.

Response:

Should the University prefer batch file transfer, the general format with be CSV with headers for the relevant data. In that case, the transport would be SSH (SCP/SFTP) encrypted via an account authenticated and authorized by a key exchange. Should the preference be via API, the format will either be JSON or XML, and the transport would be over SSL (HTTPS) encrypted via an account authenticated and authorized by a token. Data is managed via a middleware endpoint, where historical data is archived according to the University's desired retention policy. The data from the middleware is kept separated by partner, and is always encrypted in transit.

The following details are associated with the data integration/data sharing with our Student Relationship Platform™ (SRP), used internally to support student recruitment, enrollment, and retention services. In order to enable SRP, we require basic student, term, and course data to be sent from the University's Student Information System (SIS). Multiple integration methods are available to support the transfer of this data. Our integration approach is based on a combination of business requirements and the technologies already supported and in place at the local institution. Typically, our integrations use either SOAP or a REST-based web service or batch file transfers via SFTP.

The frequency of the student data feed is daily (before business hours), while the term and course data can be updated daily, once a term or a couple times a year based on frequency of change to the underlying data on campus.

The technology implementation timeline follows the marketing and recruiting start-up timeline. Implementation times vary with scope and resourcing.

Wiley's process to implement data feeds is as follows:

- Business decision made on source systems of data determine in scope feeds.
- Wiley to share data specifications/requests.

4. Describe available APIs, toolkits for creating connectors, and available services, etc.

Response:

Our Student Relationship Platform (SRP) and Engage each have integration APIs for both creating and fetching data. These are generally used as integration endpoints to other systems (e.g. creating new users in Engage from Banner). In addition, we do have prebuilt middleware to ingest data via flat file, as indicated in previous responses.

5. Identify a project outline for the integration of technical services, including:
   a. detailed project plan
   b. University resources needed
   c. implementation timeline.

Response:

The integration framework varies slightly based on which services are selected. A generic implementation is as follows:

1) The partner institution's technology and administrative leads have a kick-off call with the Wiley Partnership Director and technology lead.
   i) Outcome: Identify implementation team members and business requirements.
2) Implementation Team has technical call.
   i) Outcomes: define architectural approach to match University requirements, defines and assigns resources and timeline.
3) Work on integration is completed by both the University and the Wiley Technology Team.
   i) Outcomes: architectural approach validated with POC, security keys exchanged, etc.
4) Partner institution's technology and administrative leads have close-out call with Wiley's Partnership Director and technology lead.
   i) Outcome: ensure satisfaction with scope and implementation

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The timeline associated with this can vary depending on architectural approach, scope of integration services, and availability of University resources.

6. Indicate the process of working with the University's Information Technology department to plan, develop, implement, and evaluate the effectiveness of integrations.

Response:

Please see the response to #5 above.

7. Describe how product(s) addresses accessibility to ensure the application is accessible to people with disabilities. Describe testing for adherence to accessibility guidelines and standards (WCAG 2.0 Level AA). Provide documentation of the testing performed and results of that testing, including VPAT(s).

Response:

WES is committed to using tools that meet the WCAG 2.0 AA standards (available at https://www.w3.org/WAI/WCAG20/quickref/) for accessibility. Some of our courses use Wiley-developed tools for interaction or content presentation. The Wiley-developed tools meet the WCAG 2.0 AA standards. Wiley also incorporates third-party learning tools, each of which has its own accessibility statement. Examples include: web conferencing (AdobeConnect, Big Blue Button), video (Kaltura, Vimeo, YouTube), VoiceThread, FlipGrid, and a host of others. Wiley technologists and designers evaluate all third party learning tools using a verifiable accessibility checklist based on WCAG 2.0 AA to ensure they meet WCAG 2.0 AA standards prior to implementation. As a rule of thumb, all content in our courses and the tools that we embed in courses should comply with WCAG 2.0 Level AA standards.

8. When products are identified as not meeting accessibility standards, describe the commitment and process to remediate.

Response:

When content is not accessible, our content and learning designers work with faculty and program directors to create alternative content and activities (e.g., a clickable learning activity may be replaced by static content achieving the same learning outcomes). In addition, our team will address specific requests for accommodations on a case-by-case basis.

Host Applications

9. Describe your approach and policy regarding ownership of customer data that resides in your data center.

Response:

Customer data hosted in our datacenters is owned by the University and used by Wiley in service of the University.

10. Describe customer rights and abilities regarding moving and copying.

Response:

Wiley will follow the University's policies on customer rights, as the data is owned by the University.

11. Describe vendor and partner practices related to moving and copying data.

Response:

Salesforce is our primary third-party business partner for moving and copying data. Due to the volume of content and the potential for Salesforce to refresh its information, we have linked to the privacy statements on their site here: https://www.salesforce.com/company/privacy/.

12. Describe where your services and data storage are located geographically.

Response:

Our services and delivered via Cloud Infrastructure, either with AWS (we use several geographic regions in the continental U.S., including Virginia, Oregon, and Ohio), Heroku, or via Salesforce.

13. Describe any exit strategies you offer.

Response:

The Engage LMS data is portable and can be extracted as Moodle courses. Extracts from SRP can be generated via the SRP API, or as standard reports.

Security

14. Describe how and where any sensitive data (e.g., Credit card, financial, authentication credentials, cryptographic keys, SSN, FERPA, HIPAA or other legally regulated data) are stored on clients, servers, and participating external devices. Describe how the data are protected (e.g. cryptographic

algorithms, key size and handling). How would you address the University's preference that credentials not be stored?

Response:

Should the University leverage SSO for their teaching and learning activities, authentication credentials would be stored within institutional systems and not stored in Wiley's LMS, Engage. In the case of FERPA data, records are stored in SRP and Engage, encrypted in transit using SSL (TLS_ECDHE_RSA_WITH_AES_128_GCM_SHA256, 128 bit keys, TLS 1.2).

15. Describe all authentication and authorization processes and options both end-user and among component interfaces.

   a. Include interoperability with external authentication and authorization sources (e.g. directories, federations, SSO, SAML, two factor authentication).
   b. Include all pertinent documentation describing interfaces and configuration options.

Response:

The teaching and learning toolset is designed with interoperability in mind, either as a series of embeddable LTI providers, or with a full Engage integration. The preferred approach is a bilateral shibboleth deployment. Engage also has connectors for CAS, LDAP (including Active Directory), and the potential for custom integrations. The goal for Wiley is to leverage the University authentication and authorization system if possible (which then allows the University to offer things like attribute release for authorization and/or two-factor authentication). Because Engage is based on Moodle, all relevant Moodle plugins for authentication apply.

Privacy

16. Provide your privacy statement and that of any partners involved in providing your proposed solution.

Response:

Wiley's privacy statement can be found at https://www.wiley.com/en-us/privacy as well as in Exhibit C.

Salesforce's privacy statements can be found at https://www.salesforce.com/company/privacy/.

17. Describe any user and/or activity information collected automatically or directly through inquiry or consent forms sent directly to you or other parties outside of the application system, whether the information collected is personally identifiable, for what purpose(s) it is collected, and how long it is retained.

Response:

Inquiry, or "lead generation forms" will typically request personally identifiable information (PII) such as: name, telephone number, email address, country, and state if in the U.S. If a user is outside of the US, we ask for a messaging service and username. For compliance with GDPR, the consent to receive SMS/MMS messages from us is off by default for anyone who selects a country within the EU.

Additional data collected automatically by our CMS and submitted along with the PII include machine generated data such as "UTM Strings" and data generated by our partner analytics services such as Google, Tealium, and VisualIQ.

All data is transmitted using Secure Sockets Layer (SSL) and all sites are configured for HTTP Strict Transport Security (HSTS) to ensure PII is secure. Data stored in the CMS directly is encrypted at rest and is retained no longer than 30 days.

18. Describe the specific means used to collect such information (e.g., cookies, web bugs, etc.).

Response:

Collecting PII is performed via an interactive Request for Information (RFI) form placed throughout our online marketing sites. Cookies are used to capture and temporarily store UTM strings received from online marketing campaigns and facilitate their transmission to the RFI. JavaScript is also utilized on the RFI to provide interactive validation for required fields and facilitate the transfer of UTMs from cookies to the RFI. Additionally, third-party marketing affiliates may place anonymous cookies for the purposes of analytics, performance improvement, and attribution.

19. Describe how information is stored and kept secure and confidential.

Response:

In addition to SSL and HSTS ensuring the security of data during transmission, data at rest is stored within the CMS utilizing encrypted data tables. The CMS is secured using industry best-practices with regular human and automated penetration tested conducted. We maintain, and will provide attestation for PCI v3.2 SAQ-A compliance upon request.

20. Data are not to be shared without explicit permission of the appropriate UM staff. Specify whether you share the user and/or activity information with other parties. If information is shared with other parties, identify specifically who these parties are and respond to items a. through c. for each.

Response:

Wiley will not share data without explicitly permission of the appropriate UM staff. Should the need arise to share data, we have outlined our approach to data collection, encryption and other data security measures below.

All sensitive data is encrypted at the database level using SHA encryption. All data transmissions occurring using SFTP, HTTPS, and/or SOAP. The authentication is credential-based. If deemed necessary we can support external authentication such as SSO. Security roles govern user access and are granted based on business need only. All sessions require TLS and HTTPS connections for communication. SFTP is used for file transfers, if file transfers are needed.

a. Identify any user and/or activity information collected automatically or directly through inquiry or consent forms sent directly to you or other parties outside of the application system, whether the information collected is personally identifiable, for what purpose(s) it is collected, and how long it is retained.

Response:

Inquiry, or "lead generation forms" will typically request personally identifiable information (PII) such as: name, telephone number, email address, country, and state if in the U.S. If a user is outside of the US, we ask for a messaging service and username. For compliance with GDPR, the consent to receive SMS/MMS messages from us is off by default for anyone who selects a country within the EU. In addition, we require any third party with access to PII to sign a Data Privacy Agreement (DPA) to ensure they are GDPR compliant.

Additional data collected automatically by our CMS and submitted along with the PII include machine generated data such as "UTM Strings" and data generated by our partner analytics services such as Google, Tealium, and VisualIQ.

All data is transmitted using Secure Sockets Layer (SSL) and all sites are configured for HTTP Strict Transport Security (HSTS) to ensure PII is secure. Data stored in the CMS directly is encrypted at rest and is retained no longer than 30 days.

b. Describe the specific means used to collect such information (e.g., cookies, web bugs, etc.).

Response:

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Collecting PII is performed via an interactive Request for Information (RFI) form placed throughout our online marketing sites. Cookies are used to capture and temporarily store UTM strings received from online marketing campaigns and facilitate their transmission to the RFI. JavaScript is also utilized on the RFI to provide interactive validation for required fields and facilitate the transfer of UTMs from cookies to the RFI. Additionally, third-party marketing affiliates may place anonymous cookies for the purposes of analytics, performance improvement, and attribution.

      c.   Describe how information is stored and kept secure.

Response:

In addition to SSL and HSTS ensuring the security of data during transmission, data at rest is stored within the CMS utilizing encrypted data tables. The CMS is secured using industry best-practices with regular human and automated penetration tested conducted. We maintain, and will provide attestation for PCI v3.2 SAQ-A compliance upon request.

21. Specify whether your offering includes ingesting or connecting to personally identifiable transactions or other records from third parties. If so, please respond to a. through c. below:

    a.   Identify any user and/or activity information collected automatically or directly through inquiry or consent forms sent directly to you or other parties outside of the application system, whether the information collected is personally identifiable, for what purpose(s) it is collected, and how long it is retained.

Response:

Inquiry, or "lead generation forms" will typically request personally identifiable information (PII) such as: name, telephone number, email address, country, and state if in the U.S. If a user is outside of the US, we ask for a messaging service and username. For compliance with GDPR, the consent to receive SMS/MMS messages from us is off by default for anyone who selects a country within the EU. In addition, we require any third party with access to PII to sign a Data Privacy Agreement (DPA) to ensure they are GDPR compliant.

Additional data collected automatically by our CMS and submitted along with the PII include machine generated data such as "UTM Strings" and data generated by our partner analytics services such as Google, Tealium, and VisualIQ.

All data is transmitted using Secure Sockets Layer (SSL) and all sites are configured for HTTP Strict Transport Security (HSTS) to ensure PII is secure. Data stored in the CMS directly is encrypted at rest and is retained no longer than 30 days.

b. Describe the specific means used to collect such information (e.g., cookies, web bugs, etc.).

Response:

Collecting PII is performed via an interactive Request for Information (RFI) form placed throughout our online marketing sites. Cookies are used to capture and temporarily store UTM strings received from online marketing campaigns and facilitate their transmission to the RFI. JavaScript is also utilized on the RFI to provide interactive validation for required fields and facilitate the transfer of UTMs from cookies to the RFI. Additionally, third-party marketing affiliates may place anonymous cookies for the purposes of analytics, performance improvement, and attribution.

c. Describe how information is stored and kept secure.

Response:

All data is transmitted using Secure Sockets Layer (SSL) and all sites are configured for HTTP Strict Transport Security (HSTS) to ensure PII is secure. Data stored in the CMS directly is encrypted at rest and is retained no longer than 30 days.

G. Financial

In response to the University of Montana's request for providers to "support online educational activities for residential and distance learners," Wiley Education Services is outlining an initial framework for a strategic partnership designed to enable the University to expand its educational reach and achieve its academic, efficacy, and business-related goals.

1. The contract initial term will be annual, renewable up to 10 years (e.g., initial one-year, with 9 additional one-year renewal periods). Indicate if this is acceptable.

Response:

Wiley Education Services believes collaborative discussion regarding key decision points is critical to the formation of a strategic partnership between our organizations. Creating a final and mutually agreeable partnership structure to support the University of Montana is dependent upon the response to critical collective decision points such as those identified below:

- **Collective Decision Point: Scope of Project**
  - The ability to define an overall scope of work and commit to specific launch and milestone dates is central to planning efforts. Based on more than 20 years of partnering with higher education institutions in online program management initiatives, we believe the vision for The University of Montana's expansion of its online efforts will require a long-term partnership with shared governance and investment across both parties.

- **Collective Decision Point: Services Provided**
  - Includes activities designed to scope the combination of services, technologies, and market research that are necessary to support the partnership at both organizations.

- **Collective Decision Point: Organizational Structure**
  - Discovery and due diligence efforts to create a shared governance model with stakeholders. Initiatives of this type are most successful when well-coordinated across all participating entities.

- **Collective Decision Point: Financial Model and Compensation Structure**
  - Wiley is one of the only providers in the market space with the expertise, resources, and financial capacity to invest in and support substantive yet scalable growth goals for the University of Montana. We are open to a variety of compensation models including fee-for-

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service, revenue share, and co-investment. Our approach is not "one-size fits all" but rather tailored specifically to the programs and schools supported.

Because of the level of flexibility we provide in partnerships, the length of the contract term can vary and is dependent on the level of investment by each party and the anticipated time to return on investment. Our fee-for-service engagements, where university partners take on the majority of up-front investment, typically have initial terms spanning between one and three years. Conversely, our revenue share deals, where Wiley takes on a majority of the upfront investment, typically span between seven and ten years.

2. UM will retain the right to make the final decision on the cost of courses and programs in line with Board of Regents policies. Explain your company's role in helping departments and units consider the cost-appropriateness of course and program offerings.

Response:

As part of our typical due diligence process, Wiley Education Services' Market Research team would be prepared to work with key stakeholders at the University to complete a competitive analysis of each degree program under consideration to be included within the scope of the partnership. That analysis would consider key characteristics of the degree programs including admissions requirements, number of credit hours, time to completion, applicable residency requirements, capstone requirements, and total cost of the program (tuition and any associated fees).

The results of these analyses are then provided to UM stakeholders, providing the necessary information to aid in data-driven decisions. As noted, UM would retain all rights to final decisions on each of these important program attributes. Wiley can also show the anticipated financial results and enrollment projections based on the determined program attributes as well as the impact of any material changes to the program attributes over time.

3. Provide all pricing models for the implementation and operation of online education services you will offer to the University. Specifically address your ability to finance the upfront implementation and operation costs for the University's online education program, as well as proposed approach for recovery of those upfront costs.

Response:

While various pricing models (fee-for-service, co-investment, and revenue share) are available, based on the information provided within the RFP document, Wiley

Education Services assumes that a revenue share relationship is likely the best fit to balance support of the University of Montana's desire to grow with its available resources and investment needs. Revenue share splits vary based on the scope and length of the partnership as well as the services provided. Therefore, additional due diligence and discussion with University stakeholders is needed to develop a holistic financial model. However, Wiley has included the table below in order to provide some guidance around typical revenue share arrangements and ranges.

	The University of Montana Revenue Share	Wiley Revenue Share
CORE SERVICES Marketing, Recruitment Services, Retention-Focused Student Support, and 24/7 Helpdesk	Between 45% and 55% of tuition revenue	Between 45% and 55% of tuition revenue
ENHANCED SERVICES Core Services + Full Course Development (initial build, revisions, and ongoing maintenance)	Between 40% and 50% of tuition revenue	Between 50% and 60% of tuition revenue

Wiley's revenue share arrangement covers a majority of initial start-up expenses, including (but not limited to):

- Initial market research to assess viability of program opportunities
- Design, development, and deployment of all creative assets and student recruitment materials
- Technical set-up and implementation for tracking, reporting, and analytics
- Hiring, training, and on-boarding of staff to support marketing, recruitment services, retention-focused student support services, helpdesk, and partnership operations

The revenue share also covers (at a minimum for the Core Services option) all costs related to front-end student acquisition (Marketing and Recruitment) as well as retention-focused Student Services.

4. Identify the financial investments the University will be required to make if it enters into a partnership with your company. Identify, with reference to particular programs, when the University should anticipate recovery in such investments.

Response:

Based on the revenue share models as described in the prior answer, please find a summary of estimated expenses shown as a percentage of partnership revenue.

Assumed University-Supported Expenses

Equally important to the revenue generated through the partnership opportunity will be the level of expense that the University of Montana will incur in order to grow, scale, and support online programs. Wiley Education Services has included some initial guidance on the percentage around expenses for instruction and student support services as they relate to *net* partnership revenue (the portion of the revenue retained by the University of Montana after payment of any associated partnership fees). Further scoping of the potential opportunity will help to refine projections.

Service	Description	% of Net Partnership Revenue
Instruction and Student Support Services	Includes expenses related to faculty instruction of students as well as additional support resources in pivotal areas such as admissions, financial aid, transcript evaluation, etc.	25% - 30%

Additional Notes:

    (1) Wiley assumes that the University of Montana would implement faculty instruction models designed to support teaching and learning at scale.

If the University of Montana were to elect to fund all expenses related to any additional course development, additional expenses are likely to be within the ranges provided below:

Service	Description	% of Net Partnership Revenue
Course Development (initial build, revisions, and maintenance)	Includes expenses related to initial build of courses include subject-matter expert fees for faculty working directly with instructional designers, design and development of courses, and multi-media production, as well as factoring in planned revisions and maintenance over the life of the contract	8% - 13%

Additional Notes:

    (1) If the University of Montana elects to have Wiley provide course development services, then these expenses would be covered as part of Wiley's revenue share split in the Enhanced Services model.

On an opportunity of this type, our initial guidance on profitability is that the University of Montana could achieve net income margins between **20 and 35 percent** at partnership maturity after partnership fees and university expenses are deducted. Understanding that the University is still in the exploration stage of various partnership opportunities, we felt it was important to share this information in the spirit of good and transparent partnership, demonstrating the level of openness and communication fundamental to an engagement of this type.
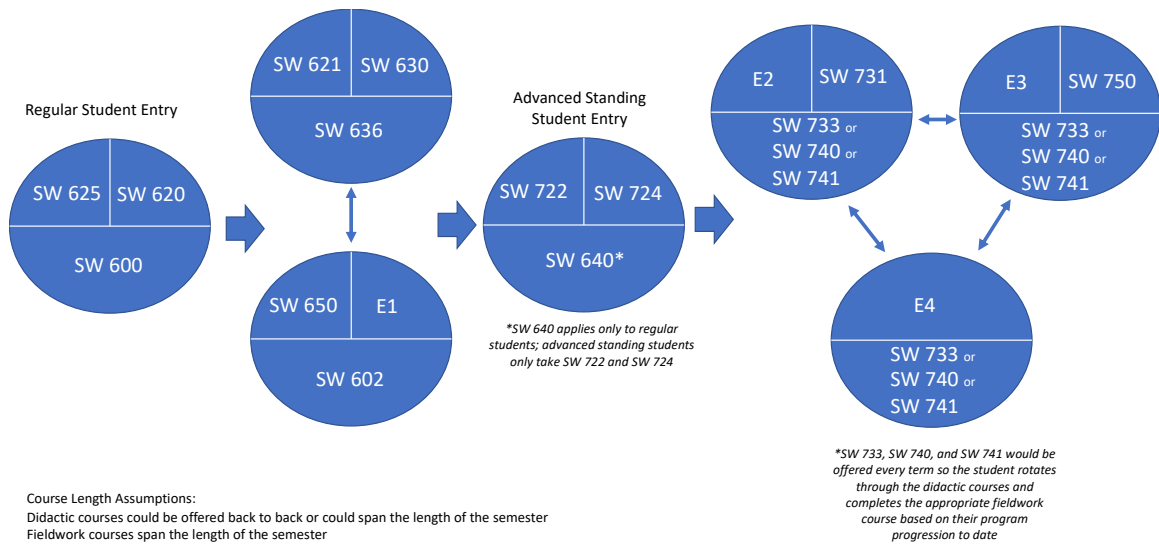
We recognize there is still much we would need to learn about each other and collective decisions to be made that could impact financial results. **Ultimately, our goal is a financial model that is mutually beneficial to both Wiley and the University of Montana, reflective of each organization's level of investment and supportive of each organization's goals.**

    5. The University may need to hire instructors through its internal processes prior to the delivery of new or expanded online courses and programs. Identify how these instructional costs will be paid for as part of the financial model.

Response:

If desired as part of the initial scoping process, Wiley Education Services can assist the University of Montana in designing programs for scalable growth and efficient use of resources and estimating associated expenses. Additionally, Wiley recognizes the critical need to balance the teaching responsibilities of faculty members with their research and professional development activities when considering the appropriate resourcing needs and models.

As a starting point, Wiley can help the University determine the appropriate program design and course sequencing. An example for a typical MSW program, one of many possible alternatives that can achieve same/similar results, is included below for reference.

Regular Student Entry

SW 625 | SW 620
SW 600

SW 621 | SW 630
SW 636

SW 650 | E1
SW 602

Advanced Standing Student Entry

SW 722 | SW 724
SW 640*

*SW 640 applies only to regular students; advanced standing students only take SW 722 and SW 724

E2 | SW 731
SW 733 or SW 740 or SW 741

E3 | SW 750
SW 733 or SW 740 or SW 741

E4
SW 733 or SW 740 or SW 741

*SW 733, SW 740, and SW 741 would be offered every term so the student rotates through the didactic courses and completes the appropriate fieldwork course based on their program progression to date

Course Length Assumptions:
Didactic courses could be offered back to back or could span the length of the semester
Fieldwork courses span the length of the semester

From there, resource allocation and staffing needs can be determined. Below is an example of a course schedule that provides information about the number of courses offered each term as well as the level of course development new builds, refreshes, and/or maintenance required prior to a course being taught within that term.

Course Number	Credit Hours	FA19	SP20	SU20	FA20	SP21	SU21	FA21	SP22	SU22	FA22
SW 625	3	FD	CR	ND	ND	ND	CR	ND	ND	ND	CR
SW 600	3	FD	CR	ND	ND	ND	CR	ND	ND	ND	CR
SW 620	3	FD	CR	ND	ND	ND	CR	ND	ND	ND	CR
SW 630	3		FD		CR		ND		CR		ND
SW 621	3		FD		CR		ND		CR		ND
SW 636	3		FD	CR	ND	ND	ND	CR	ND	ND	ND
SW 602	3			FD		CR		ND		CR	
SW 650	3			FD		CR		ND		CR	
E1	3			FD	CR	ND	ND	ND	CR	ND	ND
SW 640	3				FD	CR	ND	ND	ND	CR	ND
SW 722	3	FD			CR			CR			CR
SW 724	3	FD			CR			CR			CR
E2	3		FD			CR			CR		
SW 731	3		FD			CR			CR		
SW 733	3		FD	CR	ND	ND	ND	CR	ND	ND	ND
E3	3			FD			CR			CR	
SW 740	3			FD			CR			CR	
SW 750	3			FD	CR	ND	ND	ND	CR	ND	ND
E4	3				FD	CR	ND	ND	ND	CR	ND
SW 741	3				FD	CR	ND	ND	ND	CR	ND
Courses	Credits	Courses per Term									
20	60	5	9	11	14	14	14	14	14	14	14

		Fully Developed									
		FD	5	6	6	3	0	0	0	0	0	0
		Refreshes									
		CR	0	3	2	6	7	5	4	6	7	5
		Taught / No Updates									
		ND	0	0	3	5	7	9	10	8	7	9

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Once the number of courses is known, the University will need to make the key decision about a faculty resourcing model. The ability to scale tenured faculty accordingly is particularly relevant to a well-regarded research institution such as the University of Montana. Multiple models exist that would allow the University to do so, and an example of one such model is provided below.
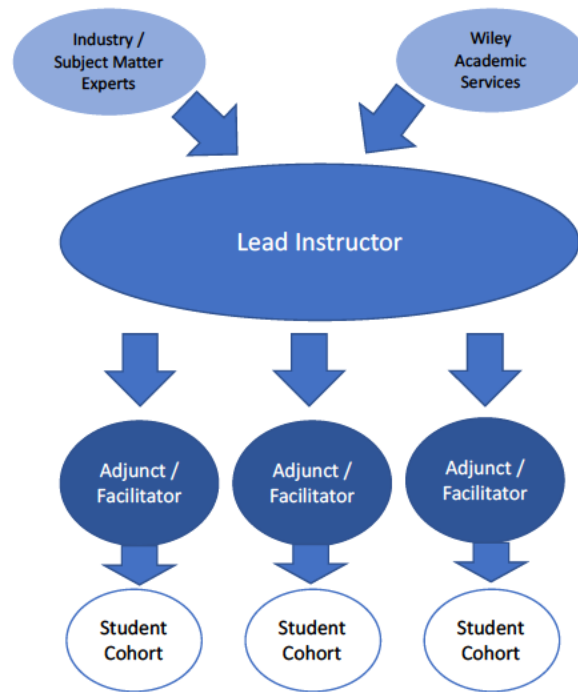
Costs associated with instruction can be funded in a variety of different ways. For the majority of partnerships that Wiley currently supports, the University covers all expenses related faculty and instruction. Utilization of some of the tools and models described previously allows partners to optimize their resource efficiency and expense allocations. That said, depending on the needs of the University, Wiley can offer a variety of solutions to support new faculty resources and funding that can be scoped upon request, including:

- Funding and management of advertising / posting for faculty/adjunct/section instructor positions
- Provision of resources to support any clinical or field placement requirements for degrees such as an MSW
- Provision of funding to support hiring of net new faculty positions

The funding options described above can be provided via fee-for-services or captured within a broader revenue share arrangement. Please note that the revenue share ranges provided previously within this response do not assume that Wiley is making these investments.

6. What constitutes an 'enrollment' in terms of how it is accounted for in the financial model? Please explain how the following situations are considered in terms of enrollment and their relation to the revenue arrangements:

   a. A University of Montana student is taking an on-campus version of the degree/course and decides to switch to an OPM supported version of the online degree/course.

   b. An OPM-supported online degree student decides to switch to an on-campus degree/course not supported by an OPM.

Response:

Wiley Education Services' financial models are based off of the number of assumed credit hours taken by students within an academic term. In order to calculate partnership revenue within a financial model, Wiley considers an "enrollment: to mean a course enrollment. For example, if there are 100 students enrolled in a 16-week academic term, and we assume that each student is taking a part-time load of two courses, then there are 200 enrollments (and an assumed 600 credit hours being taken).

If students enrolled in the University's on-campus programs enroll in a course in a Wiley-supported program, tuition collected from those students for the program course shall be included in the tuition share report submitted to Wiley. If a student enrolled in a program takes a course taught exclusively on-campus by the University, tuition collected for the on-campus course shall not be included in the tuition share report submitted to Wiley.

7. How do you ensure that your company does not compete with the University for a portion of our own students?

Response:

We recognize that many institutions are concerned about the impact of online programs on on-campus enrollments. Our internal research suggests that traditional universities can increase enrollment when students have the option of taking an online program in addition to on-campus programs. It also suggests that those who do not go online risk market-share losses, as students will go somewhere else to be online. Our research article is in Exhibit E and is also online at https://edservices.wiley.com/online-programs-expand-enrollment/.

8. Provide details regarding your financial status and condition. Describe how this facilitates the financing solution proposed.

Response:

All of Wiley's financial statements to date, plus information detailing our current financial position, can be found online here:

- http://www.wiley.com/WileyCDA/Section/id-370237.html

9. What is the source of your investment capital?

Response:

All of Wiley's financial statements to date, plus information detailing our current financial position, can be found online here:

- http://www.wiley.com/WileyCDA/Section/id-370237.html

10. How many programs do you have the capital to launch in a single year?

Response:

Our objective is to help our partners identify the programs within their portfolio positioned to meet market demand. Given our financial position, Wiley Education Services is positioned to make necessary capital investments to support the anticipated growth of our partners. We are not limited to a specific number of programs per year.

11. Identify the general revenue-share arrangements and include all services that are provided in the arrangement. Identify services not included, or included at an additional cost in revenue share or fees. Specify these arrangements in reference to 1 year, 3 year, and 7 year terms.

Response:

All of Wiley's current revenue-share arrangements fall into one of two major categories. The first category includes what we consider to be our Core Services—Marketing, Recruitment, and Retention-Focused Student Support (including 24/7 Helpdesk)—which support students across the lifecycle. In this type of partnership, Wiley takes on the majority of day-to-day operational activities, allowing the university partner to focus more heavily on the teaching and learning and student experience components of the program. The next category, Enhanced Services, extends service offerings beyond the core and allowing colleges and universities to select additional secondary services where Wiley has developed strong capabilities and competencies. The most common service added within an Enhanced Services partnership is course development.

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	University Partner Revenue Share	Wiley Revenue Share
CORE SERVICES Marketing, Recruitment Services, Retention-Focused Student Support, and 24/7 Helpdesk	Between 45% and 55% of tuition revenue	Between 45% and 55% of tuition revenue
ENHANCED SERVICES Core Services + Full Course Development (initial build, revisions, and ongoing maintenance)	Between 40% and 50% of tuition revenue	Between 50% and 60% of tuition revenue

Additionally, we have previously worked with university partners who anticipate differential needs over the course of the partnership. For example, some universities or colleges may need only need support in the initial build of courses but are prepared to take over revisions and maintenance after the first few years of the contract. In those cases, we are able to craft revenue shares that are differential by year, supporting the higher investment made by Wiley in the early years but then transferring additional share to our partner as they invest in building or growing their own capabilities.

As a revenue share partnership would require Wiley to make a significant up-front investment in the University, it would require a minimum contract term length of seven years.

12. As well as providing information on the total cost of ownership, itemize services and identify costs and/or revenue share percentage based on the selection of specific services for programs (e.g., marketing and recruitment).

Response:

Wiley Education Services takes care to structure all revenue-share arrangements to comply with federal regulations around Title IV and bundled services. For that reason, the Core Services partnership described in the prior answer represents our typical baseline of services. As discussed in prior sections of this document, Wiley does offer services in a disaggregated manner primarily in fee-for-service engagements. Should the University of Montana be considering a disaggregated services arrangement, Wiley requests the opportunity to engage in additional discovery to more accurately scope and price the services under consideration and to ensure compliance with all applicable laws and regulations.

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13. Describe how revenue splits will be calculated for both new online programs and existing online programs over the near and long term.

Response:

In prior sections of this document, we have described our typical process for the creation of enrollment and financial projections for online program opportunities. Our projections include only those students who are actively marketed to and recruited by Wiley Education Services. For net-new online programs, please refer to our answer to question 6 within this section for our definition of enrollments and how revenue and ultimately revenue share splits are applied against those projections.

For existing online programs for which the University of Montana would like Wiley to take over services, Wiley assumes the same calculation as previously described for any net new student enrollments within the contract period that are actively marketed to and recruited by Wiley. For existing students within the program, there are two options.

The first option is for the university partner to continue to provide retention support for these students until they complete the program. In this option, no revenue share would be charged as Wiley would not provide any services for these students.

The second option is for Wiley to take over retention-focused student support services for these students. Our university partners often select this option in order to provide a consistent experience for all students enrolled in the program. In this case, a smaller revenue share, reflective of the narrower focus of services provided to these students is negotiated and mutually-agreed upon. In either scenario, we assume that within two to three years of partnership, the majority of existing students will have completed the program and all students henceforth will have been marketed to/recruited under partnership with Wiley.

14. Based on initial market analysis, estimate growth and revenue over the initial contract term.

Response:

When considering a new online program management opportunity, Wiley Education Services works with our university partners and prospective partners to engage in a holistic examination of market and program analyses that allow for the formulation of a customized approach to planning, campaigns, projections, and services designed to meet your University's, individual campuses', and programs' needs and goals. Our approach combines data, research, and insights from a variety of sources, including:

1. 20+ years of proprietary data around program performance and student behavior
2. Real-time higher education marketplace performance insights from strategic partnerships
3. Critical insights from our Market Strategy & Research team about the adult learner population, degree/certificate program viability, and growth potential
4. Key findings from initial conversations with University stakeholders
5. Information publicly available on the University's website and about the University and its programs from third-party data sources such as IPEDS

From there, the data from these secondary research activities is combined with primary research conducted by the Marketing and Media teams specific to YOUR brand and programs.

As an example, Wiley Education Services' media planning uses both first- and third-party tools to influence our forecasts and execute our media strategy. Wiley Education Services leverages program-specific consumer interest, search volume metrics, and website rankings from tools like SEMrush, SEOclarity, Google Keyword Planner, IPEDS, and Burning Glass. Used in concert with these tools is the Wiley Keyword Zipper, a proprietary tool that combines thousands of permutations of keyword combinations and separates them into distinct tiers based on a historical propensity to apply/convert based on 1st party data, giving Wiley Education Services unique insights at a granular level. In addition, for more bespoke forecasting and intelligence, we are able to utilize our status as a strategic partner to the premier ad tech companies, leveraging account teams at Google, Facebook, LinkedIn, etc., for customized reports and industry insights.

With consideration to both our desire to provide the University of Montana with inputs and projections representative of the depth and thoroughness of our approach, as well as, the time constraints inherent to any RFP process, Wiley has chosen to provide an example of this work applied to programs that are either currently offered fully online by the University of Montana or programs identified to have strong market viability potential through the aforementioned research and analyses conducted as part of our initial due diligence in support of this RFP response.

We feel this example will provide clarity and insight into how we apply our approach to create enrollment projections. If selected to continue discussions with the University of Montana, we would seek to further clarify the *scope* of the partnership and roll-out of programs in order to refine our projections. The start ramps are representative of the potential for growth we see both within the University of Montana's current online portfolio as well as future opportunities. It is our desire to continue to engage in collaborative discussions with University stakeholders on the scope of the engagement in order to build a financial model that accurately reflects

the potential of a partnership. Without that further discovery, it is premature for us to provide revenue projections.

Projected Start Ramps

Program	Year 1	Year 2	Year 3	Year 4	Year 5
M.Ed. Early Childhood Education	15	19	22	24	25
M.Ed. Educational Leadership	30	40	49	55	58
Master of Public Health (MPH)	45	60	77	87	92
Master of Public Administration (MPA)	30	40	51	58	61
Master of Social Work (MSW)	140	200	256	291	307
Master of Business Administration (MBA)	39	56	71	81	85
MS Business Analytics	48	69	88	100	105
Master of Accountancy	39	56	71	81	85
MBA Concentrations	32	46	59	67	70
MS Speech-Language Pathology	39	52	63	72	76
MA School Counseling	32	43	52	59	62
MA Clinical Mental Health Counseling	48	69	88	100	105
Doctor of Physical Therapy (DPT)	30	38	44	50	53

15. Specify incentives/penalties your company proposes relative to achieving projected program growth.

Response:

Revenue-share models, as assumed in this response, are based on a shared success model. In this model, each organization contributes to the achievement of enrollment, growth, and revenue goals. For example, Wiley Education Services may provide funding and staffing for student acquisition activities while, of equal importance, the University of Montana sets the admissions requirements, makes admissions decisions, and supports students through the financial aid process. Therefore, in this model, there is an inherent incentive for both parties to achieve and/or exceed goals.

16. In case of contract termination/cancellation, specify teach-out conditions and residual revenue splits your company proposes.

Response:

In the case of any contract termination or cancellation, Wiley Education Services' standard agreement contains provisions specifying that revenue share in effect at the time of termination/cancellation continues to be paid by the university partner for any/all students acquired under the partnership term until those students have completed their program of study (or attrite from the program). Wiley would continue to provide services to these students. This condition is due to the nature of a typical revenue-sharing online program management partnership where Wiley would invest the majority of capital upfront during student acquisition and be reliant on retention and ultimately successful program completion by students to maximize student lifetime value and return on investment.

17. Specify what percentage of profit will be reinvested in your operations and how the reinvestment will serve to maximize performance.

Response:

Over the past several years, Wiley Education Services has made significant investments in expanding our technology stack and strategic partnerships for the benefit of all partners. Specifically, we are focused on finding the best qualified prospective students and meeting them where they are in their student decision journey with targeted messaging. This effort has led us to specifically target investment to increase our capabilities around optimization, automation, new communication channels, etc. Our profits also fund the launch of new programs. Additionally, much of our profits are re-invested into our workforce, ensuring that we are hiring, onboarding, training, and consistently coaching qualified professionals to best support your student population.

SECTION 4: OFFEROR QUALIFICATIONS

4.1	UNIVERSITY'S RIGHT TO INVESTIGATE AND REJECT

The University may make such investigations as deemed necessary to determine the offeror's ability to provide the supplies and/or perform the services specified. The University reserves the right to reject a proposal if the information submitted by, or investigation of, the offeror fails to satisfy the University that the offeror is properly qualified to perform the obligations of the contract. This includes the University's ability to reject the proposal based on negative references.

4.2	OFFEROR QUALIFICATIONS

To enable the University to determine the capabilities of an offeror to provide the supplies and/or perform the services specified in the RFP, the offeror shall respond to the following regarding its ability to meet the University's requirements. THE RESPONSE, "(OFFEROR'S NAME) UNDERSTANDS AND WILL COMPLY," IS NOT APPROPRIATE FOR THIS SECTION.

NOTE: Each item must be thoroughly addressed. Offerors taking exception to any requirements listed in this section may be found nonresponsive or be subject to point deductions.

**4.2.1	References.** Offeror shall provide a minimum of **three** (3) references that are using or have used services of the type proposed in this RFP at a minimum, the offeror shall provide the company name, location where the services were provided, contact person(s), contact telephone number, e-mail address, and a complete description of the services provided, and dates of service were provided. These references may be contacted to verify offeror's ability to perform the contract. The University reserves the right to use any information or additional references deemed necessary to establish the ability of the offeror to perform the contract. Negative references may be grounds for proposal disqualification.

Response:

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4.2.2 Company Profile and Experience.

- Include a brief history and most recent year ending financial statement of your firm as part of your proposal. Separate the financial statement and clearly mark so it can be removed during public meetings. Make sure it still can be identified as section 4.2.2. It is important to UM that your firm is a solid member of the business community and will be in business for the foreseeable future to ensure continuity of supply and support that your firm is proposing.

Response:

See our company history described in section 3.1.a.1.

All of Wiley's financial statements to date, plus information detailing our current financial position, can be found online here:

- http://www.wiley.com/WileyCDA/Section/id-370237.html

- List the legal name and full address of the entity that will enter into the agreement with UM.

Response:

Wiley edu LLC
1415 W. 22nd Street, Suite 800
Oak Brook, IL 60523

- List your firm's contact person, address, telephone number, fax number, and e-mail address.

Response:

M. Wayne Parkins
851 Trafalgar Court, Suite 420
Maitland, FL 32751

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mparkins@wiley.com
407-644-6773
FAX: 407-875-0420

- To assist us in complying with Federal Guidelines, please indicate if any of the following classifications are appropriate: Y/N

N_ Minority Business   N_ Small Business   N_ Women-owned Business

It is the policy of the University of Montana to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by minorities. The University encourages the participation of these providers in our procurement activities. Further, the University encourages Firms bidding for major contracts to provide for the participation of small businesses and businesses owned by minorities through partnerships, joint ventures, and other contractual opportunities. The University reserves the right to require periodic reports on the usage of small and minority owned firms in the performance of major contracts.

How will your firm help us accomplish this goal?

Response:

Wiley Education Services partners with organizations and businesses of varying sizes based on the needs of our partner institution. We are happy to provide periodic reports on the usage of small and minority owned firms in the performance of major contracts.

4.2.3   Resumes. A resume or summary of qualifications, work experience, education, and skills must be provided for all key personnel, including any subcontractors, who will be performing any aspects of the contract. Include years of experience providing services similar to those required; education; and certifications where applicable. Identify what role each person would fulfill in performing work identified in this RFP.

Response:

In section A.3. (page 8) we have provided biographies of key leaders as well as major individual contributors to our partner efforts. If Wiley Education Services is awarded the contract, we can then supply you with resumes of the individuals who will be working with the University of Montana to support the partnership and its goals.

4.2.4 Equal Pay for Montana Women. Executive Order No. 12-2016 promoting equal pay for Montana women directs the Department of Administration to include incentives in the RFP process for contractors who engage in best practices to promote wage transparency. These best practices include the following:

        (a)   posting salary ranges in employment listings;

        (b)   certifying that the contractor will not ask about wage history in employee interviews; and

        (c)   certifying that the contractor will not retaliate or discriminate against employees who discuss or disclose their wages in the workplace.
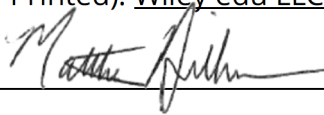
☐   No, I do not agree.

Statement of Compliance with Equal Pay for Montana Women. Offeror indicating it will comply with Executive Order No. 12-2016 will receive 5% of the total points available. Offerors who do not comply will not receive the available points. Offerors are required to sign and upload a PDF copy of this certification with their proposal to certify compliance.

☒   Yes, I agree and will comply with the best practices to promote wage transparency outlined in Executive Order No. 12-2016.

Company Name (Clearly Printed): Wiley edu LLC

Authorized Signature: _____

Date: February 6, 2019

4.2.5   Method of Providing Services. Offeror shall provide examples of services that they will provide in relation to achieving the elements outlined in the Scope of Work: Section 3

Response:

Please reference our responses to Section 3.0 Requirements on page 5.

4.2.6   Your Turn. This section gives offeror the opportunity to provide information "in its own words" regarding its assets, skills, and expertise and what makes it the best offeror for the job.

Response:

In addition to the expertise, proven processes, and technology investments described at length in this proposal, Wiley Education Services offers additional technology-based services and partnerships that could benefit the University of Montana and its students. More details on these services and partnerships are below.

Ranku: In order to maximize website conversion and search engine optimization (SEO), Wiley highly recommends implementing Ranku. A technology platform owned by Wiley, Ranku aggregates all of your programs into one centralized and searchable online location that's aligned with your existing website(s) and brand. The platform is designed to significantly increase conversion of your traffic by quickly and efficiently providing prospective students with the most relevant information they need to make an informed decision about your programs, even if they are spread across multiple departments, schools, or institutions within a system. Partners that have used this technology have also been able to effectively broaden their reach by receiving quality inquiries for their programs outside of their immediate geographic areas as a result of improved SEO.

Additionally, this technology solution provides real-time, actionable data on visitor behavior and student demand for programs, keeping you informed on which programs have the most potential for growth. This data also helps capture information about who your students are early in the funnel, which informs marketing strategy.

Ranku is not limited to online programs—it can be leveraged to for campus and hybrid programs as well.

Credly: Wiley established a strategic partnership with Credly because we have long felt that digital credentials are going to be a large part of the next phase of higher education. We want to partner with forward-thinking and innovative institutions that

have a desire to elevate their support for students by providing greater transparency to the skills the student develops during their degree. With the increased scrutiny of the skills of a potential job candidate, digital credentials provide a more granular recognition of a skill, knowledge, or capability that will supplement and support the degree a student earns. Credly fills the void that many institutions have.

FutureLearn: Wiley also has a strategic relationship with FutureLearn, the award-winning social learning platform that delivers online degrees and short courses at scale to over seven million people across 200 countries. Founded by the Open University, FutureLearn has developed a unique platform to deliver courses based on "storytelling" and with rich conversation between learners at its core. Its strong pedagogical and user experience focus has seen it deliver retention rates of 99 percent on its qualifications. Its extensive learner base would be a strong route to market available to the University of Montana

Along with the platform, FutureLearn has also developed advanced insight into learning design for social learning. As part of its unique relationship with Wiley, they would offer their extensive learning design expertise around social learning and storytelling to the University of Montana learned from supporting over 1000 courses. FutureLearn would not only support Wiley on online degree development, but would embed its learning design methods and principles inside University of Montana faculties and collaborate with the University on advancing these approaches to create a distinctive experience.

Overall, Wiley's combination of human capital expertise and continued investments in leading technology is empowering partners to leverage a high-powered analytics strategy to scale while your students receive superior experiences.

SECTION FIVE: COST PROPOSAL

5.1   Cost Proposal

Provide complete pricing and/or revenue share schedule that includes specifically how the firm will handle all tuition, fees, or other costs paid by online learners. Break down the associated costs and/or component costs in detail. Explain your company's fee structure, breaking out costs by activity and by the type of educational program being delivered. If there are varying levels of service leading to tiered or scaled pricing (e.g., market research, course development and course delivery vs. marketing only), indicate such.

1. Total Cost paid by online learner $_____ Enter total but for supplemental provide break down or proposal can be deemed non responsive.

2. Total Component Costs $_____ Same as #1

3. Total Educational program cost, cost per program $_____ Same as #1

4. Total Service Costs $_____ Same as #1

Response:

Based on the objectives stated in this RFP, we have conducted some preliminary analysis and have prepared an example of start ramps for a partnership with the University of Montana. While this is not a cost proposal, our intent is to share a potential financial framework with high level cost estimates based on three key tenets as described below:

- Demonstrates the potential for a **phased roll-out of online programs** supported by Wiley Education Services and related student acquisition initiatives over the course of the partnership
- Includes a **diverse mix of programs** across academic disciplines supported by a foundation of priority programs with high market growth potential
- Provides an initial **estimate of potential long-term growth** by projecting start ramps for five years for each proposed phase of roll-out; this is meant to be *demonstrative only* – actual contract term length would be negotiated as discussions progress

Because of the large number of programs identified as high potential by Wiley, we have selected the Master of Social Work (MSW) program as an example to answer the questions specified by the University of Montana regarding cost components.

Key Program Assumptions

Number of Credit Hours	60 hours – Regular Track 33 hours – Advanced Standing Track
Cost per Credit Hour	$750 / credit hour
Assumed Service Model	Enhanced Services (Core Services + Course Development)
Assumed Revenue Share	45% to University / 55% to Wiley

Cost Components

Total Cost paid by online learner:	$45,022 for Regular Track students $24,750 for Advanced Standing students
Revenue Share to Wiley (55% of tuition revenue)	$24,762 for Regular Track students $13,613 for Advanced Standing students

In this example Wiley's revenue share percentage covers all costs associated with the following cost components:

- Marketing (expenses historically between 25-30 percent of total partnership revenue)
- Recruitment / Retention (expenses historically between 7-12 percent of total partnership revenue)
- Course Development (expenses historically between 5-10 percent of total partnership revenue)

The University of Montana would be responsible for all expenses associated with Instruction and Student Support Services, which have historically ranged between 25 and 30 percent of net partnership revenue (post-revenue split).

EXHIBIT A: Statement of Compliance

We hereby acknowledge receipt of specifications for the University of Montana RFP #3108, and have read and understand the specifications and agree to furnish the specified (requirements or products) and services requested herein, as detailed in our proposal.

Name of Contractor: <u>Wiley edu LLC</u>

Address: <u>1415 W. 22nd Street, Suite 800</u>

City/State/Zip: <u>Oak Brook, IL 60523</u>

Phone: <u>(630) 366-2900</u>

Name of Authorized Officer:

<u>Matthew Hillman</u>

Signature of Authorized Officer:

Date:

<u>February 6, 2019</u>

Title:

<u>President</u>

In the event that any notice is required to be sent by the University of Montana to the Contractor or if the University finds it otherwise necessary to contact the Contractor, that notice will be deemed to be received by the Contractor two calendar days after the notice is deposited in the United States mail by certified mail by the University of Montana, addressed to:

Contractor trade name:

<u>Wiley edu LLC</u>

Name of Contractor's Contact Person:

<u>M. Wayne Parkins</u>

Address:

<u>851 Trafalgar Court, Suite 420</u>

<u>Maitland, FL 32751</u>

Telephone:

<u>(630) 366-2900</u>

Fax:

<u>(630) 528-3101</u>

The University of Montana is absolved from the responsibility of ascertaining Contractor's future mailing address or contact person other than that referred to in this document unless notified of changes in writing to Business Services-Procurement.

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Exhibit B: Exceptions Summary

Wiley Education Services Exceptions to the RFP Summary Document
University of Montana
RFP Number: UOM-RFP2019-3108
RFP Title: Online Program Management (OPM)

Wiley Comments:
If selected as a finalist, Wiley Education Services requests an opportunity to discuss the following terms and conditions included in the RFP document (UOM-RFP2019-3108).

Exceptions to RFP: University of Montana Standard Terms and Requirements
Wiley wishes to have further dialogue around the following terms and conditions outlined in the RFP.
- Page 1, Purchase Order/Contracts, #10
- Page 3, #28 Severability
- Page 4, #33 Termination of Contract

Exceptions to RFP: University of Montana – Online Program Management Contract
Wiley wishes to have further dialogue around the following terms and conditions outlined in the University of Montana Online Program Management Contract.
- Page 4, Hold Harmless/Indemnification
- Page 5, Specific Requirements Cyber Insurance
- Page 5, Deductibles/Retentions
- Page 7, Ownership of Work Product
- Page 7, Third Party Claim
- Page 8, Termination for Convenience
- Page 8, Actions in event of breach
- Page 9, Notifications
- Page 11, Severability

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EXHIBIT C: Privacy Statement

Wiley Education Services Privacy Statement

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This Privacy Policy describes how Wiley collects and uses the personal information you provide to Wiley. It also describes the choices available to you regarding our use of your personal information and how you can access and update this information.

- How We Collect Information
- Information You Provide
- Information We Receive From Other Sources
- Use of Your Information
- Disclosure and Sharing of Your Information
- Cross Border Transfers
- Security
- Disclosure in Chat Rooms or Forums
- Cookies
- Your Rights
- Third-Parties
- Changes to this Privacy Policy
- Recourse

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The types of personal information that Wiley collects directly from you may include:

- Contact details, such as your name, email address, postal address and telephone number;
- Internet Protocol ("IP") addresses used to connect your computer to the Internet;
- Educational and professional interests;
- Tracking codes such as cookies;
- Usernames and passwords;
- Payment information, such as a credit or debit card number;
- Comments, feedback, posts and other content you provide to Wiley (including through a Wiley website);
- Communication preferences;
- Purchase and search history;
- Location-aware services, the physical location of your device in order to provide you with more relevant content for your location;
- Information about your personal preferences, hobbies and interests; and
- Communications with other users of Wiley's services.

In order to access certain content and to make use of additional functionality and features of Wiley's websites and services, we may ask you to register for an account by completing and submitting a registration form, which may request additional information.

If you choose to register and sign in by using a third-party account (such as your Facebook account), the authentication of your login is handled by the third party, and any personal information collected during that third-party login is not covered by this policy. Wiley will collect your name, email address and any other information about your third-party account that you agree to share with us at the time you give permission for your Wiley account to be linked to your third-party account.

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Wiley may receive information about you if you use any of the websites we operate or the other services we provide. We also work closely with third parties (including, for example, business partners and sub-contractors in technical, payment and delivery services, advertising networks, analytics providers, academic institutions, search information providers, and credit reference agencies) from whom Wiley may receive information about you.

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In addition, we may use your information in the following ways (after obtaining your consent, if required):

- To provide you with information about products and services that you request from us;
- To send you periodic catalogues from Wiley;
- To provide you with information about other products, events and services we offer that are either (i) similar to those you have already purchased or inquired about, or (ii) entirely new products, events and services;
- For internal business and research purposes to help enhance, evaluate, develop, and create Wiley websites (including usage statistics, such as "page views" on Wiley's websites and the products therein), products, and services;
- To notify you about changes or updates to our websites, products, or services;
- To administer our services and for internal operations, including troubleshooting, data analysis, testing, statistical, and survey purposes;
- To allow you to participate in interactive features of our service; and
- For any other purpose that we may notify you of from time to time.

Personal information will not be kept longer than is necessary for the purpose for which it was collected. This means that, unless information must be retained for legal or archival purposes, personal information will be securely destroyed, put beyond use or erased from Wiley's systems when it is no longer required or, where applicable, following a request from you to destroy or erase your personal information.

Disclosure and Sharing of Your Information
Wiley will not disclose to or share your personal information with any unaffiliated third party except as follows:

- Where necessary in connection with services provided by third parties (i) who provide us with a wide range of office, administrative, information technology, production, payment, or business management services, and (ii) who are required to comply with this policy;

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- Where you voluntarily provide information in response to an advertisement from a third party;
- Where your consent has been provided, with a third party such as an academic institution, school, employer, business or other entity which has provided you with access to a product or service through an integration or access code, information may be shared regarding your engagement with the service or product, results of assessments taken and other information you input into the product or service;
- Where Wiley is required to disclose personal information in response to lawful requests by public authorities and government agencies, including to meet national security or law enforcement requirements; to comply with a subpoena or other legal process; when we believe in good faith that disclosure is necessary to protect our rights, to enforce our Terms of Service, or to protect the rights, property or safety of our services, users or others; and to investigate fraud; and
- Where all or substantially all of the business or assets of Wiley relating to our services are sold, assigned, or transferred to another entity.

If necessary in connection with providing publishing services on behalf of third parties, such as institutions and societies, Wiley may disclose navigational and transactional information in the form of anonymous, aggregate usage statistics and demographics information that does not reveal your identity or personal information.

Cross Border Transfers

Wiley may transfer your personal information outside of your country of residence for the following reasons:

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- In order to satisfy global reporting requirements, Wiley may be required to provide your personal information to Wiley affiliates in other countries.

By submitting your personal information, you agree to this transfer, storing or processing of your information. We will take all steps reasonably necessary to

ensure that your personal information is treated securely and in accordance with this Privacy Policy and all applicable data protection laws.

Security

We will use appropriate physical, technical and administrative safeguards to protect your data. Access to your personal data will be restricted to only those who need to know that information and required to perform their job function. In addition, we train our employees about the importance of maintaining the confidentiality and security of your information.

Disclosure in Chat Rooms or Forums

You should be aware that identifiable personal information--such as your name or e-mail address--that you voluntarily disclose and that is accessible to other users (e.g. on social media, forums, bulletin boards or in chat areas) could be collected and disclosed by others. Wiley cannot take any responsibility for such collection and disclosure.

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You have the right to make a written request to be informed whether or not we hold or process any of your personal information (by emailing privacy@wiley.com). In your written request, you may:

- Request that we provide you with details of your personal information that we process, the purpose for which it is processed, the recipients of such

information, the existence of any automated decision making involving your personal information, and what transfer safeguards we have in place;

- Request that we rectify any errors in your personal information;
- Request that we delete your personal information if our continued processing of such information is not justified;
- Request that we transfer your personal information to a third party;
- Object to automated decision-making and profiling based on legitimate interests or the performance of a task in the public interest (in which event the processing will cease except where there are compelling legitimate grounds, such as when the processing is necessary for the performance of a contract between us);
- Object to direct marketing from us; and
- Object to processing for purposes of scientific, historical research and statistics.

Where applicable under your local laws, we will not use your personal information for marketing purposes, nor disclose your information to any third parties, unless we have your prior consent, which we will seek before collecting your personal information. You can exercise your right to prevent such processing by checking certain boxes on the consent forms we use when collecting your personal information. If at any point you wish to review or change your preferences you can use the "opt-out" or unsubscribe mechanism or other means provided within the communications that you receive from us or by sending an email to e-service@wiley.com. Note that you may still receive transactional communications from Wiley. Some territories have national laws requiring a local Data Protection Officer (for example Singapore and Germany). Please click here for the relevant contact details.

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EXHIBIT D: Partner Success Example: Purdue University

Expanding Online Programs at Scale

In 2010, Purdue University recognized the potential that online continuing education offered as a route to achieving the institution's 10-year strategic goals. The Provost's task force recommended that the university identify a partner to provide services and support for online programs at a level it could not provide with its own campus resources.

As a result, the Provost authorized Purdue Extended Campus to work with the university's procurement department to conduct a selection process built around an RFP. From the nine proposals received, Purdue selected Deltak (now Wiley Education Services) as its partner. "We were impressed with Deltak's client base, its history in online education, but most of all with the people it sent to our campus— people who were experts but down-to-earth and as committed to quality online education as we were," recalls Michael Eddy, Director of Digital Education and a member of the selection team. The contract with Wiley Education Services was signed in November 2010, and the first online program was successfully launched in fall 2011.

Purdue Approach to Market Research

More than two decades of experience working with a wide range of institutional partners prepared Wiley Education Services to develop a plan that would scale and reach Purdue's goals. As with any top-tier institution of higher learning, Purdue University's institutional goals could only be achieved through its component colleges. Some colleges recognized the opportunity in online programs, while others had to be brought along. Wiley Education Services pursued a strategy of helping online-ready colleges launch programs at scale while helping other colleges identify where their opportunities may lie.

In developing this strategy to achieve the University growth targets, Wiley Education Services conducted extensive market research to determine program viability and growth potential. Once the programs were identified in collaboration with Purdue, detailed launch plans were built and executed. These included: strategic planning, online course development, faculty support, marketing and student recruitment and retention.

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Results

The College of Education's MSEd in Learning Design and Technology program was the first program to launch online in 2011. Wiley Education Services' ability to coordinate activity and partner with Purdue's Curriculum and Instruction department throughout the implementation process allowed the program to launch on time with nearly twice the projected enrollments. With Wiley Education Services' expansive marketing and recruiting, Education faculty and staff were pleasantly surprised by the number, quality, and diversity of the students they were able to attract.

"The College of Education at Purdue wanted to increase enrollments through the online MSEd in Learning Design and Technology program, but we were not focused only on the numbers," said Professor Tim Newby, the original academic director of the program. "We are known for teaching high-caliber students, and Wiley Education Services targets and recruit students who can and will graduate from the program."

Steady growth and demand for the program persists today. Prior to offering the program online, the ground-based program had fewer than 20 students. "We just had a record fall 2017 start for this program of more than 90 students, with a total of nearly 300 enrollments in the program. Our continuing collaboration with Wiley Education Services gives us the tools to continue to grow our program," said Newby.

Similarly, the MS in Communication program, a program that launched in 2014, now has over 400 students enrolled, with plans to expand, diversify and enrich the program over the next few years to attempt to reach a goal of over 1,000 enrollments. The program is currently implementing Wiley Education Services' recommendations on how to achieve that goal.

The Wiley Education Services and Purdue partnership remains grounded by flexibility and a high level of collaboration and cooperation. "We continuously evolve together to identify innovative ways to reach and serve our diverse and ever-growing student audiences," said Eddy.

EXHIBIT E: Wiley Education Services Research Article

Why Online Programs Won't Cannibalize On-Campus Programs

Online degree programs are now a common offering at colleges and universities across the country. But if you've had concerns that these online programs will eventually replace or decrease enrollment in your on-campus programs, the good news is that there's already plenty of evidence showing that this is not the case. Instead, the relationship between on-campus programs and online or distance learning programs is more of a symbiotic one.

For example, data from one of Wiley Education Services' institutional partners, a mid-size regional university, demonstrates how an online MBA program has actually supported the university's on-campus MBA program. After launching an online MBA program in 2014, the institution saw steady enrollment growth over the next two years. In addition, the on-campus MBA program's enrollment numbers, which had been declining, began to stabilize and eventually show a slight increase.

Enrollment Growth at a Wiley Partner After Launching an Online MBA[1]
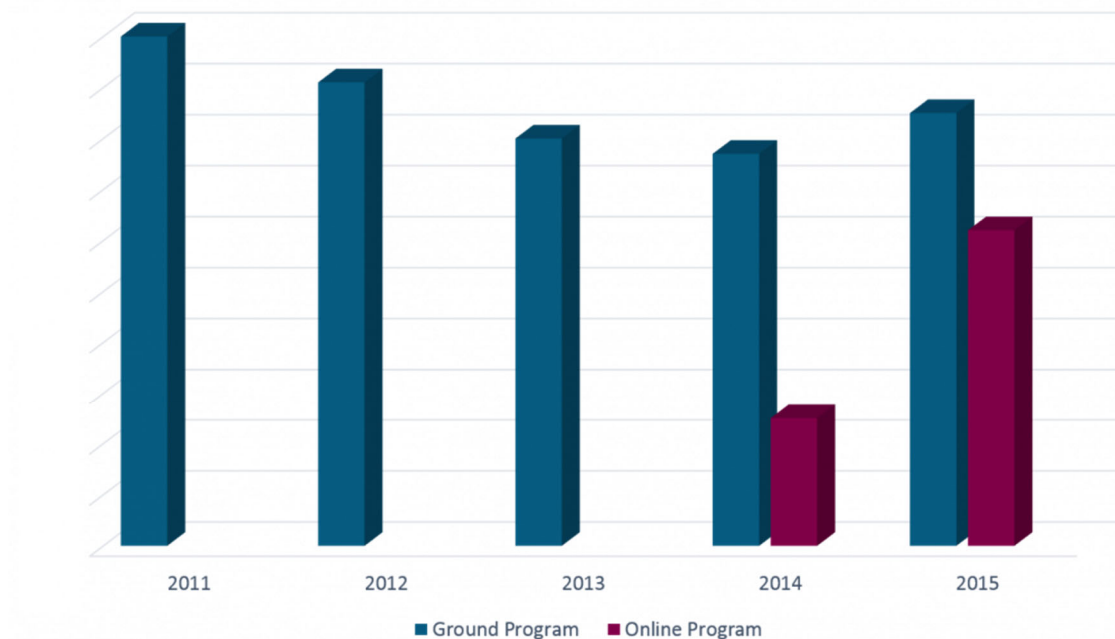
Online Programs Engage Students Who Would Not Enroll On-Campus

Market research[2] also shows that the total number of graduates from *both* on-campus and online programs for schools that offer an online MBA are growing at a rate of 2 percent a year. In comparison, schools that did not offer an online MBA option showed a decrease in enrollment at an average rate of 8 percent per year.

This phenomenon is not limited to business programs, as we see from the effect of adding an online Master of Science in Nursing–Family Nurse Practitioner (MSN-FNP) degree[2]:

- The total number of graduates (on campus and online) from institutions that offer an online/distance MSN-FNP degree has grown 177 percent since 2012.
- These institutions produced 54 percent of the total number of MSN-FNP graduates in 2016, up from 29 percent in 2012.
- Institutions that only offer an on-campus MSN-FNP without an online/distance option have lost market share, having owned 71 percent of the market in 2012, and now owning only 46 percent in 2016.

This research suggests that traditional universities can increase enrollment when students have the option of taking an online program in addition to on-campus programs. It also suggests that those who do not go online risk market-share losses, as students will go somewhere else to be online.

Online Programs Open Enrollment for Working Professionals and Non-Local Students

There are several reasons why online programs are not undermining on-campus programs:

- Prospective online students tend to decide on the online modality first, before they make any decisions about which institution to attend. The flexibility and convenience of online learning are the most important factors for these individuals. If you don't offer an online program, they won't consider your institution – instead, they'll consider other institutions that do.
- The majority of individuals enrolling in online programs are adults or non-traditional students who are going back to school, usually while holding a full-time job. They may want to develop additional knowledge or credentials to advance their careers, or they may need new skills to keep up in their field. Online programs offer the convenience to allow these working students to fit classes in around their work schedules and personal obligations.
- Online programs complement on-campus programs by extending their market reach to non-local students, reducing the barrier of student location. These potential students may very much want to attend a specific university or enroll in a certain program but are unable or unwilling to uproot their families and disrupt their careers.

- Online programs may expand your local student base as well, as individuals who may have been reluctant to enroll due to time and schedule constraints may appreciate a more flexible option.
- Finally, because online programs allow for students from virtually anywhere to enroll, it's an important asset that helps promote the school's brand, both nationally and internationally. This results in greater brand recognition and raises the school's profile, all of which leads to potentially greater on-campus student enrollment in the future.

In addition to providing additional student demographics with new learning opportunities, online programs offer substantial benefits to institutions, including potential growth in their campus programs and increased brand awareness. Colleges and universities that do not offer online options in addition to campus programs may even find their enrollments declining.

Sources:

[1]Wiley Education Services data

[2]The Integrated Post-Secondary Education Data System (IPEDS)

Any questions? Contact us.

M. Wayne Parkins   (407) 644 6773   mparkins@wiley.com

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