Proposed Sole Source Purchase Form

Pursuant to New Mexico Procurement law, the UNM Purchasing Department will post your completed form on the UNM Sunshine Portal for 30 days prior to purchase of the goods/services.

I. GENERAL INFORMATION. PLEASE PROVIDE THE FOLLOWING:

<table>
<thead>
<tr>
<th>Date of Request</th>
<th>November 20, 2019</th>
<th>Requisition Number (If Applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Submitted by:</td>
<td>Dan D. Garcia</td>
<td>Requisition Number (If Applicable)</td>
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<tr>
<td>Department</td>
<td>Enrollment Management</td>
<td>Title</td>
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<tr>
<td>Email</td>
<td><a href="mailto:ddgarcia@unm.edu">ddgarcia@unm.edu</a></td>
<td>Phone</td>
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<tr>
<td>Proposed Vendor</td>
<td>Ruffalo Noel Levitz</td>
<td>Amount</td>
</tr>
<tr>
<td>Buyer Team - See Commodity list at</td>
<td><a href="http://www.unm.edu/~purch/commcodes.pdf">http://www.unm.edu/~purch/commcodes.pdf</a></td>
<td></td>
</tr>
</tbody>
</table>

Provide a basic description of goods/services to be provided:

Provider will assist UNM to analyze previous years of financial aid awards (scholarships and grants), then we will use this analysis to formulate an updated strategy for awarding these funds for future years.

Why is this purchase needed?

Maximize the efficiency and effectiveness of our limited awarding resources to better attract and retain students. Currently awards are determined by best assessment of student need, ability to pay, willingness to pay, and competitive market; however, it is not based on a comprehensive data analysis that this process will provide (and therefore we are only making assessments of appropriate award amounts, which puts us at a disadvantage in this competitive environment of shrinking numbers of high school graduates across the nation.)

II. BASIS FOR SOLE SOURCE PROCUREMENT. CHOOSE APPLICABLE BOX(ES) AND PROVIDE ADDITIONAL INFORMATION, AS REQUESTED:

☒ Proprietary item, technology or service only available from the proposed vendor. (Check box and describe proprietary component)

The yield optimization tool uses proprietary formulas and approaches, exclusive to Ruffalo Noel Levitz, and not offered by any other provider in the market. It includes student-level enrollment and financial aid receptivity analytics, retention analysis, and enrollment and net revenue projections. There is no comparable financial aid planning solution that utilizes the following combination of research and statistical modeling to balance strategic enrollment goals, student need, and institutional finances in order to optimize yield and net revenue. We require competitor benchmarking—something we did not find in another competitor. RNL also provides a proprietary reporting platform that provides secure, on-demand access to financial aid program dashboards.
 Compatibility requirement with existing item, technology or service. (Check box and describe compatibility requirement)

The provider has an exclusive partnership with SAS, our preferred database modeling system, for this tool. The SAS tool enables us to simulate, review, and assess hundreds of possible awarding scenarios to understand the impact of aid allocation in unique ways in an environment we are familiar with. Built based on the results of the econometric model, this proprietary tool determines the appropriate amount of financial aid—down to the student level—and creates a series of optimized awarding parameters that influence the recommended awarding structure.

 Renewal of support/maintenance/subscription of software, technology or other intellectual property. (Check box and describe)

 Other Basis for Sole Source: Please describe below:

We explored at least three other providers and, in addition to the proprietary platform and awarding tool, Ruffalo Noel Levitz is the least expensive option by thousands of dollars.

III. SUPPLEMENTAL DETAILS. PLEASE PROVIDE ADDITIONAL INFORMATION AS REQUESTED BELOW:

Describe in detail the unique capabilities of the proposed vendor’s goods/service and/or personnel performing the work and why this constitutes the only source. Focus on what is unique about the goods/service and why no other vendor could meet your needs.
Price Sensitivity Analysis to guide recruitment, marketing, and financial aid strategy by assessing elasticity of demand and perceptions of value, including a competitor study to ensure institutions are optimally priced.

Provides the RNL TrueCost Calculator™, a responsive net price calculator, to provide students and parents an accurate perspective on affordability long before they consider applying. RNL’s calculator exceeds federal requirements, is customized to include merit scholarship estimates, is mobile responsive, and is branded to each unique partner institution.

Five-Year Enrollment and Net Revenue Modeling capabilities are unique to RNL. This model enables UNM to see the longer-term impacts of new student aid strategies on net revenue, the institutional aid budget, and the overall discount rate over a five-year period.

Describe the due diligence made to locate other possible sources including communications with other universities, communications with similar providers, web searches, yellow page searches, review of advertisements and trade publications, etc.

I spoke with several colleagues, including Kyle Moore, AVPEM at U of Wyoming...his campus size is about 13,000 students and reported that his institution contracted with Ruffalo Noel Levitz for award modeling and were very pleased/believed the service was unique and the best in the marketplace.

In addition, Ruffalo Noel Levitz is the provider being used by New Mexico State University, although I have not contacted them. That our largest competitor and another flagship (U of Wyoming) is using this service was another helpful indicator that the service is in demand.

I communicated with EAB and Maguire and Associates, as well, which provide this type of service but failed to provide the same capabilities we are seeking.

List the other vendors who were contacted. Please describe the specs/qualifications/criteria that the other vendors were unable to satisfy.

In communications with one other provider, EAB, there was no required a five-year enrollment and net revenue modeling in their service. Additionally, they do not provide competitor benchmarking based on responses.

Maguire and Associates did not provide information that indicated they met the requirements we were seeking.