

REQUEST FOR PROPOSAL
PROJECT NO. RFP 17-52
CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM

QUESTIONS AND ANSWERS NO. 1

Date: April 7, 2017

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

1. Whether companies from Outside USA can apply for this (like India or Canada)?

Answer: HCC seeks proposals from vendors that will meet the needs of the RFP scope which include a significant amount of the work to be completed onsite; HCC is not looking for an offshore solution.

2. Whether we need to come over there for meetings?

Answer: Yes, it is anticipated that an onsite presence will be required to effectively coordinate and perform the work necessary to deliver the scope of services as noted in the RFP.

3. Can we perform the tasks (related to the RFP) outside USA (India or Canada)?

Answer: HCC seeks proposals from vendors that will meet the needs of the RFP scope which include a significant amount of the work to be completed onsite; HCC is not looking for an offshore solution.

4. Can we submit the proposals via email?

Answer: No, official proposals may not be delivered electronically as noted in the RFP.

5. Is this meeting going to be held in person only, or will dial in information be provided to bidders?

Answer: Audio Bridge will be available through 713-942-6777 PIN: 7726#.

REQUEST FOR PROPOSAL

PROJECT NO. RFP 17-52

CRM System

QUESTIONS AND ANSWERS NO. 2

Date: April 20, 2017

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

1. Do you intend to give all employees' access to the CRM?

Answer: No. Employees in Communications, Foundation, Student Services, Planning and Institutional Effectiveness, and Instructional Services will have access.

2. How many applications do you receive per year?

Answer: 55,000+

3. What is your total employee count? HCC has experienced growth in the last 5 years. Do you envision that continuing trending over the next 5 years?

Answer: 6,500 including full-time staff and faculty, part-time staff and adjunct faculty.

4. What is the current student count?

Answer: 100,692

5. Do you have a centralized marketing department? If not, will each department be responsible for their own marketing?

Answer: Yes, HCC has centralized marketing department.

6. How many social media accounts will you be managing total? (For example: 2 FB, 3 Twitter, 1 Instagram, 2 LinkedIn, 1 Pinterest, and 1 YouTube = 10 total accounts.)

Answer: HCC has 25-plus (3 main FB, 2, Twitter, 1 YouTube). However, we are in process of consolidating to less than 20 across all platforms.

7. Is there an incumbent providing similar service to HCC? If yes, can you please name the incumbent and describe why you are proceeding with an RFP to procure services (are there different/new services you would like a new vendor to provide)?

Answer: No. HCC does not currently have an enterprise-level district-wide CRM.

8. What strategic priorities/challenges is HCC looking to address through this RFP? Are there specific goals/outcomes HCC is looking to achieve? And in what time period?

Answer: The Business Need is as follows:

Enrollments

Across the U.S., community college enrollments have declined each year since 2010, from 7M in 2010 to 5.9M in 2015.^{1,2} Environmental factors that contribute to this predicament include declining unemployment rates and high school graduates. Indeed, an 800,000 community college decline among students age 25 and older has been realized between 2010 and 2015 and a three percent decrease for high school graduates from 2010 to 2020.³ Thus, both the traditional and nontraditional-aged student pools have decreased.

As opposed to the national picture, fall enrollments at Houston Community College have remained relatively flat over the past five years. In fall 2012, semester credit hour enrollment was 58,587.⁴ In fall 2016, semester credit hour enrollment was 57,138.⁵ To change this trajectory and counter the national impacts of economic and demographic trends, the institution must execute a new recruitment strategy by identifying, engaging, and converting more qualified leads.

Completion

The Texas Higher Education Strategic Plan 60x30 includes a goal that 60% of 25-34 year olds in Texas achieving a certificate or degree by 2030.⁶ To achieve this goal and support the completion agenda, graduation and retention rates at the college must improve. Regarding retention rates, in fall 2014, the fall to spring retention rate for new semester credit hour students was nearly 80 percent; however, the fall to fall retention rate for the same population was a dismal 41.7 percent. The graduation rate offers more hope. In 2010-11, more than 9,000 students completed an Associate degree, certificate, completion of core curriculum, or marketable skills achievement award. This number increased to nearly 13,000 in 2014-15.⁷ The institution must continue on this pathway.

¹ National Student Clearinghouse. (2015). *Current Term Enrollment Estimates*. Retrieved from <https://nscresearchcenter.org/currenttermenrollmentestimate-fall2015/>

² National Student Clearinghouse. (2012). *Current Term Enrollment Estimates*. Retrieved from <https://nscresearchcenter.org/currenttermenrollmentestimate-fall2012/>

³ Education Advisory Board. (2016). *The Shifting Enrollment Landscape: New Disciplines in Marketing and Recruiting*. Retrieved from https://www.eab.com/-/media/EAB/Research-and-Insights/CCF/Studies/2016/33207_CCEF_Shifting_Enrollment.pdf

⁴ Houston Community College Office of Institutional Research. (2016). *2015-16 Fact Book*. Retrieved from [http://www.hccs.edu/district/about-us/oir/hcc-fact-book/2015-2016-Fact-Book-\(Rev093016\).pdf](http://www.hccs.edu/district/about-us/oir/hcc-fact-book/2015-2016-Fact-Book-(Rev093016).pdf)

⁵ Houston Community College Office of Institutional Research. (2017).

⁶ Texas Higher Education Coordinating Board. (2015). *Texas Higher Education Strategic Plan: 2015-2030 60x30TX*. Retrieved from <http://www.theccb.state.tx.us/reports/PDF/6862.PDF>

⁷ Houston Community College Office of Institutional Research. (2016). Houston Community College Office of Institutional Research. (2016). *2015-16 Fact Book*. Retrieved from [http://www.hccs.edu/district/about-us/oir/hcc-fact-book/2015-2016-Fact-Book-\(Rev093016\).pdf](http://www.hccs.edu/district/about-us/oir/hcc-fact-book/2015-2016-Fact-Book-(Rev093016).pdf)

To survive in the changing landscape which is higher education, an institution will need to more carefully manage market penetration, retention rates, completion rates, and job placement to generate revenues. To improve the student enrollment trend and create the ultimate student experience that spans the student life cycle, Student Services needs a tool to manage, support, and streamline this life cycle. This tool has the potential to facilitate an increase in the number of prospects, yield rate, and conversion rates as well as monitor and track the effectiveness of marketing, support initiatives, job placement, and alumni engagement efforts.

For example, one of the most popular CRMs has published impressive benefits realized by company customers including:

- 27% increase in sales revenues
- 32% increase in lead conversion
- 34% increase in customer satisfaction
- 56% faster deployment of services⁸

A moderate increase in any of these metrics at HCC will support our goal of providing the ultimate student experience.

Strategic Alignment

Student Success

Improve the student experience.

Increase student completion of degrees, certificates, and other awards.

Organizational Stewardship

Improve and streamline all business transactions and processes.

Performance Excellence

Focus on one HCC and consistency of quality experience across the campuses, departments, and facilities.

Employ analytic measures to assess and guide institutional performance.

Innovation

Expand the use of technology throughout the institution.

9. What are some challenges unique to HCC that you think proposing vendors should be aware of as they compose their responses?

Answer: The primary challenges for any large enterprise-level product for HCC is to scale the product and to integrate and sustain the product into all existing related solutions and workflows.

⁸ Salesforce, <https://www.salesforce.com/>

10. How many users do you estimate would use the selected solution? And who are the intended users for this solution? Students only? Advisors, staff, and administrators?

Answer: Prospective and current students (60,000+); Student Services, marketing, foundation (800+)

11. Are there existing technology investments in student enrollment retention/intervention, and if so, how would HCC imagine a new solution to integrate with them?

Answer: HCC needs real-time data integration with the main ERP system (Oracle PeopleSoft – HR, Finance, Campus Solutions). Other systems that need to be integrated are identified in the RFP.

12. Do you have a designated project team or assigned technical staff assigned for a new technology implementation coming out of this RFP process?

Answer: The Project Team and staff will be designed based on the implementation plan and timeline provided by the bid responses. Bid responses should outline what HCC's staffing, roles, and responsibilities and their staffing, roles, and responsibilities will be in order to have a successful implementation

13. What other technologies does HCC use to manage the advising process and interact with students?

Answer: PeopleSoft, Who's Next, Emails and Live Chat Software.

14. Should responses be hand delivered, or is delivery by carrier (FedEx, UPS, etc.) acceptable?

Answer: The timely delivery by carrier is acceptable, late proposals will not be accepted.

15. Should the pricing proposal be submitted on a separate flashdrive from the rest of our response?

Answer: No, proposal and pricing can be on the same flashdrive.

16. Is it HCC's intent to contract with only one vendor or would Houston potentially contract with multiple vendors to fulfill the scope of work?

Answer: The need for more than one vendor will depend on the ability of the bidders to address all of HCC needs.

17. In Section 1.4.e regarding calendar sharing, is this for internal or external constituents? Or both?

Answer: Both.

18. In Section 1.4.n, can you clarify what you mean by the term analytics? Do you view it the same as reporting?

Answer: Yes, analytics and reports are based on data points as defined by HCC, supported by the CRM technology.

19. What is your total database contact count?

Answer: 300,000+

20. What is your total number of email sends annually?

Answer: 3,000,000+

21. How many users you will have using the marketing communications solution?

Answer: Currently 10.

22. Do you plan to communicate with leads and/or existing contacts through nurture campaigns?

Answer: Yes.

23. Can you please define the "multichannel"s for your campaigns? (ie email, web, social, mobile any other channels? All of the above channels?) Which are you already using and which do you plan to use in the future?

Answer: Web, social media, mobile, SMS, live chat, phone (call center), print, direct mail and all related customer service channels, including in-person.

24. Where would you want your data points to that drive segmentation to live? In the CRM? In other sources?

Answer: Data points should live in the CRM, but could include data points from other integrated systems where applicable.

25. In Section 1, Item 2, subitem C, the scope mentions "The ability to consolidate multiple systems of engagement (e.g., Eloqua, Smartsheet, etc.) to one system that serves prospects, current students, and alumni." Is it the desire/preference of HCC to replace these tools with functionality in the new system or to integrate with these?

Answer: This will depend. For example, it is HCC's desire to replace some (Smartsheet), but not necessarily all because an Eloqua may be required. See RFP Section 1, Item 2, Scope of Services, for example of potential points of integration.

26. Did HCC work with any vendors in the preparation of this RFP? If so, which vendor(s)? Were sections of this RFP obtained externally from HCC and if so, from where?

Answer: No.

27. Section 1, Item 4, subitem J lists "Co-curricular Events – Ability to track student registration and participation in co-curricular events (co-curricular transcripts)." Can HCC please expand on this? How does HCC define co-curricular transcripts and how do they relate to events?

Answer: Just as the official academic transcript serves as a record of the student's academic work, likewise, the co-curricular transcript serves as a record of out-of-classroom social, athletic, leadership, service and educational experiences. Typical categories include: athletics, community service, leadership training, awards & honors, workshops & seminars and clubs & organizations. Institutions may decide to add additional categories.

28. Section 1, Item 5, subitem I asks about XML support; what is HCC's current working familiarity of XML, APIs and data transfer? Is HCC currently integrating data into PeopleSoft via XML/API?

Answer: HCC works with and uses XML, API, and Oracle PeopleSoft Student Administration Integration Pack.

29. For PeopleSoft integration, does HCC have a preference for batch file transfer or web service/XML/API? If web service/XML/API, does HCC have technical staff to create and administer needed integrations?

Answer: HCC uses batch, XML, API and Oracle PeopleSoft Student Administration Integration Pack for integration and real time data transfer. HCC IT department will assist with data mapping and integration. Proposers should define what is required of HCC to accomplish integration as well as the type and timing of integration being proposed (batch, real-time).

30. Section 8 details quite a bit of marketing automation requirements that are met by HCC's current tool, Eloqua. Is HCC moving off of Eloqua in lieu of native CRM functionality?

Answer: This will depend on the targeted marketing capability of the CRM which would need to match or exceed Eloqua functionality for an Eloqua integration not to happen.

31. Would HCC be interested in keeping Eloqua if the selected CRM solution has a native integration with Eloqua? If yes, and the selected solution has Eloqua integration, how should we respond to section 8? Which items within section 8 are not addressed by HCC's current usage of Eloqua?

Answer: This will depend on the targeted marketing capability of the CRM which would need to match or exceed Eloqua functionality for an Eloqua integration not to happen.

32. Regarding section 10, is it HCC's intent to use the CRM for alumni management and donor/gift processing - or just alumni management?

Answer: This has not been decided but, in general, the CRM would need to have the functionality to support this kind of business need.

33. Is HCC looking to replace Blackbaud with the CRM or compliment it? If complimenting, where does HCC see the line between what functions Blackbaud handles vs the CRM?

Answer: This has not been determined, but could potentially happen.

34. Is HCC looking to implement the selected solution themselves or to have the selected vendor perform the implementation? Does the institution prefer on-site implementation/training?

Answer: The RFP defines the desired solution as cloud-based so the vendor would be expected to implement based on that requirement which may require on-site visits. The training would need to be on-site with online resources/documentation. Training and implementation services should be part of the response. See Section 1 Item 11: Training and Section 2 item 4 of the Price Proposal.

35. How many advise contact counts for Eloqua?

Answer: 500,000-750,000; currently capped at 1 million.

36. How many user counts for Eloqua and Oracle CX Service Cloud?

Answer: 15

37. In the Scope of Services, items a through e, are vendors expected to respond to these items or are they provided for information purposes only?

Answer: HCC requires a response to each of these items.

38. In the Scope of Services, number 7, letter C, is the question for Average Handle Time (Performance Monitoring) purposes or something else?

Answer: Items 2.a to 2.e provide a list of issues. The last paragraph in the same section outlines the proposer's requirements.

39. Are vendors expected to respond to item I from the Scope of Services or is it provided for information only?

Answer: HCC requires a response to all Scope of Services items, including Item I.

40. Section 3 provides a Phase wise implementation. Could you confirm if the following sections on Requirements will be for phase 1?

- Section 6. Contact Management Features and Requirements
- Section 7. Customer Service and Support Features and Requirements
- Section 8. Marketing/Communications Features and Requirements
- Section 9. Outreach and Recruitment (Sales) Features and Requirements
- Section 10. Fundraising Features and Requirements

Answer: Confirmed, yes. See Section 1 item 3 – Project Timeline. Responses should detail how features in Section 1 items 4-12 (pg 4-11) would be implemented in each of the phases in the Project Timeline.

41. Phasing provided in Section 3, seems to be more persona based. Are you open to SIIt suggestion on implementation phases? (i.e. Can we suggest to have Phase 1 for Marketing + Sales and Phase 2 Service?) Advise about your preference.

Answer: Answer: Section 1 Item 3 (pg 4) details the Project timeline but the bidder has the option to provide an optional/recommended timeline.

42. Could you provide a brief Overview of existing systems used for managing the following CRM processes today?

- Sales
- Marketing
- Service
- Student Administration

Answer: HCC does not have a CRM. The Student Administration and Services functions are handled in HCC's Oracle PeopleSoft – Campus Solutions.

43. Could you mention the list of systems in the existing CRM process that would be phased out when a new CRM system comes in?

Answer: The systems that could be phased out depend on the functionality of the system proposed. Major systems that will not be phased out included Oracle PeopleSoft, PS Tools, Oracle Data Warehouse, CashNet, Cisco Call Manager, Innovative Interfaces (Library), Active Directory, MS365, MS Sharepoint, Oracel Endeca, Ad Astra, and Caspio.

44. Has HCC identified or has any preference for Product of choice for CRM applications?

Answer: HCC has no preference for any product.

REQUEST FOR PROPOSAL

PROJECT NO. RFP 17-52

CRM System

QUESTIONS AND ANSWERS NO. 3

Date: April 25, 2017

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

1. What is the full product name and manufacturer of the contact center system (Zendesk , Genesys)

Answer: BMC Track-IT

2. What is the budget allocated for this project? (We would like to understand if our product matches the price point.)

Answer: Proposers are encouraged to provide their best value proposal for consideration, the project budget has not been determined.

3. Provide a complete list of the systems of engagement that will need to be consolidated into the new system.

Answer: See RFP Section 1.5.f, pages 6 through 7.

4. Will the system need to integrate with ApplyTexas.org or other external sites or systems?

Answer: No. ApplyTexas data will be loaded into HCC PeopleSoft system and the CRM will pull data from PeopleSoft.

5. Explain the type of calendar functionality that will be needed. Event calendars? Department calendars? Progress calendars?

Answer: College event, department, employee, and personal calendars.

6. What strategic priorities/challenges is HCC looking to address through this RFP? Are there specific goals/outcomes HCC is looking to achieve? And in what time period?

Answer: See RFP Section 1.2 Scope of Services.

7. Is the intention of this RFP to select a unified solution/platform that will span across all functional institutional divisions (e.g., Admissions, Financial Aid, Human Resources, Advancement, etc.) or is HCC choosing various point solutions that serve each individual division's needs?

Answer: HCC's initial main focus of the CRM is Student Success (see Student Life Cycle figure on page 12). HCC is also interested in the proposed solution's ability to address other functional areas such as Human Resources and HCC Foundation.

8. Provide high-level expectations as integration use cases for the following systems?

Answer:

Phase #	System Name	Please provide high - mid Level use case information to understand the scope	Which product line
1-3	Oracle PeopleSoft Campus Solutions system and database v9.0 and v9.2, with the ability to integrate data from multiple sources.	Source of student data and workflows	PeopleSoft Campus Solutions v8.9 (Upgrade to v9.2 starts Sept 2017)
	PS Tools v8.55	PeopleSoft programming tool set	PS Tools v8.55
1-3	Oracle Data Warehouse/EPM/OBIEE system	Student Data warehouse that is update from PS Campus Solutions System	
1-3	CashNet	Secure student payment system for tuition and payment plans	
	Eloqua		
	Cisco's Call Manager	HCC VoIP and 911 phone system	
	Innovative Interfaces Inc. Active Directory	Library system	Sierra
	MS Outlook 365	Email and MS Office	MS365
	MS SharePoint	myHCC Intranet and Team sites	MS SharePoint

2	BMC TrackIT (Work Request Ticket Management System)	IT Work request system for tracking and monitoring IT Campus Technology Services	
1-3	SmartSheet	Ad-hoc data collection and tracking	
1-3	Oracle Endeca	Hybrid search-analytical database organizes complex and varied data from disparate source systems into a flexible data model that reduces the need for upfront modeling	Endeca Version 3.2 (Not yet implemented)
2	Ad Astra	Course scheduling and optimizing system	Astra Scheduled
1-3	Caspio Online Database Software (www.caspio.com)	Online database for microsities and some HCC website data	

9. Is the goal to enter an enterprise agreement that could encompass all phases? If so, would you explore working through pricing after the RFP has closed?

Answer: Yes. Bidders need to address the requirements and features in the RFP and provide a price as outlined in Section 2. The proposed price is worth 30 points in the solicitation evaluation process outlined in Section 3.1. Vendors will be held to the submitted price throughout the implementation.

10. What is the number of users that will be impacted during each phase of implementation?

Answer: IT tickets: 15,000+

11. Regarding this section, "To implement a system that offers a variety of methods of communication, supporting personalization and individual preferences, a variety of content types (e.g., video, text, audio), streamlined communications, and effective student response/feedback mechanisms," how many text messages / video messages per month? How many tickets or cases would you expect to have opened per month or per year?

Answer: IT Services tickets: 60,000+

12. What is the estimated total volume of mass emails being delivered on annual basis?

Answer: HCC receives about 1,000,000 emails a day. Of that, only 10% are delivered. 90% are filtered out and never delivered.

13. Relevant Systems in use: Does HCC anticipate the upgrading, sun setting, and/or replacement of the systems noted in the coming 3-5 years?

Answer: Sun setting systems will depend on the functions within the proposed solution. This will be evaluated throughout the phased implementation.

14. Is HCC committed to phasing the project as identified (Phase 1 Student Recruiting and Phase 2 Student Retention) or are you open to other suggested phases?

Answer: Modifications to the proposed phases of the project plan and timeline should be identified and provided in the RFP response.

15. Is there an ETL tool currently used on campus? If not, would HCC consider implementing an ETL tool as part of this project?

Answer: Oracle PeopleSoft actually has an OEM agreement with IBM WebSphere for ETL technology that supports source data acquisition and data movement within EPM. The EPM delivered ETL tool is IBM WebSphere DataStage.

16. Describe all systems involved in processing of payments (including tracking) regarding HCC Foundation and Advancement. What is the future state of each of these systems?

Answer: Student Services: PeopleSoft Campus Solutions -> HigherOne CashNet, Foundation: Blackbaud. Both systems are functioning well. HCC does not envision replacing these at this time.

17. Provide more detailed use cases on what is expected in this requirement from a CRM system?

Answer: CashNet: Tuition and fee payment, print management payment services, Tuition payment plans; Blackbaud: Donations

18. Do you have an organization wide integration strategy which prescribes the use of any specific middleware tools or integration methodologies? If yes, can you please share details?

Answer: HCC uses Oracle PeopleSoft – SAIP for real time integration with PeopleSoft Campus Solutions.

19. Which solution is used currently for self-service?

Answer: Oracle PeopleSoft Campus Solutions and the bolt on product Student Portal from HighPoint (<https://myeagle.hccs.edu/>) provides self-service to admissions, class search, Financial Aid award tracking and acceptance, enrollment and a number of other functions. HCC's Library, LMS, email, and website also provide services that students can use to answer their questions and receive services.

20. Are any of the following functionalities supported or envisaged from the future CRM solution?

- Chat
- Email requests
- Request tracking

Answer: The proposed CRM solution should identify their ability to support these functions.

21. Which Knowledge management solution is currently used?

Answer: Knowledge management is spread across different systems. The CRM should integrate these knowledge management and the respective services across the Student Life Cycle.

22. Does existing CRM use CTI or is this an envisaged feature from the future CRM solution?

Answer: HCC does not have a CRM implemented.

23. Provide a List of channels which are supported in existing CRM: Call, Email, Chat, Social Media etc.

Answer: HCC does not have a CRM implemented.

24. Provide a list of your existing integrations with source, target systems and integration model and technology used?

Answer: Oracle PeopleSoft is the main student data source for all the systems listed in the RFP. Integrations to the systems listed in the RFP are automated through the PeopleSoft SAIP solution (Canvas, Innovative Interfaces) and XML within the system (CashNet, Ad Asta) or batch processes (Caspio, Call Manager) which are real-time or scheduled based on interactions with the business owner or proprietary interfaces imbedded in the software.

25. Is the current CRM solution feeding data to warehouse for historical reporting?

Answer: HCC does not have a CRM implemented.

26. Is Oracle Service cloud expected to be integrated with Oracle Sales Cloud & Oracle Marketing cloud in real time bi-directional mode?

Answer: HCC does not have Oracle Services Cloud.

27. What do the different phases mean (Access, Support and Success)?

Answer: Phases and the components in each phase are defined in the RFP. The terms in the question reference the three goals of providing access to HCC Services, supporting students as they move through the Student Life Cycle and success toward their quest to graduate and career goals.

28. What kind of learning environments do you have in mind/suggestions? In any case, Eloqua is capable of file/ data upload which can be shared with students through Email/ Webpages.

Answer: HCC currently uses Canvas as the platform for the Learning Management system.

29. What are the Criteria for basis of territory classification (Geographic, Product, Organization type, Size, etc.)?

Answer: HCC is one district with 6 college and 15 Centers of Excellence spread over 660 sq miles. Please reference HCC Academic Dashboard to see an example of how HCC segments and classifies data. Use the TIPS tab to better understand how to use the dashboard filtering and see the segments/classifications.

http://sy-dashboard.hccs.edu/ibi_apps/bip/portal/HCCDashboard

30. Is there any specified integration strategy/platform for the organization? What is the existing integration platform?

Answer: <http://www.hccs.edu/district/students/> myEAGLE (<https://myeagle.hccs.edu/>) as a front end for students to access applications. Faculty and Staff have access to the myHCC Intranet site which provide links to applications (see below).

The screenshot displays the myHCC Intranet homepage. At the top, the myHCC logo is on the left, and a user profile for 'William Carter' is on the right. Below the logo is a navigation bar with 'Departments & Services' and a search bar. The main content area features a large banner for 'HCC to host Opportunity Workshops' with various icons. To the right is an 'HCC eNews' section with several news items. Below the banner are three columns: 'Important Dates' with a calendar for April and May, 'Quick Links' with icons for EMAIL, Laserfiche, ORACLE, PeopleSoft, HCC Canvas, HCC Learning, Ding Charts, and HCC Room Scheduling; and 'Find a Colleague' with a search bar. At the bottom right, there is a 'Newsletter Center' with a 'submit eNews' button and a 'NEO' logo.

- Oracle PeopleSoft Campus Solutions system and database v9.0 and v9.2, with the ability to integrate data from multiple sources.
- PS Tools v8.55 3.
- Oracle Data Warehouse/EPM/OBIEE system
- CashNet
- Eloqua
- Cisco's Call Manager
- Innovative Interfaces Inc.
- AccuTrack
- Active Directory
- MS Outlook 365
- MS SharePoint
- BMC TrackIT (Work Request Ticket Management System)
- SmartSheet
- Oracle Endeca
- Ad Astra
- Caspio Online Database Software (www.caspio.com)

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REQUEST FOR PROPOSAL

PROJECT NO. RFP 17-52

CRM System

QUESTIONS AND ANSWERS NO. 4

Date: April 27, 2017

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

1. Regarding total cost of the price proposal (Section 2), should this be an all-inclusive lump sum for the duration of 5 years?

Answer: The price proposal shall be in accordance with RFP Section 2 and must include total and detailed cost as minimally defined in the RFP. In addition, proposers may provide additional clarification to the price proposal.

2. On the call, it was mentioned that the Pricing Proposal should be submitted in a separate sealed envelope. Does this include all of Tab 5's responses or just Section 2?

Answer: In accordance with RFP Section 4 – Instruction to Proposer the price proposal shall be noted Tab 5 and shall ensure all questions noted are responded to.

3. If one company provides implementation services and a separate company provides product, are you able to contract with both upon award? If yes, is there a preference on who should be listed as the respondent? If no, what is the recommend response for vendors in this situation?

Answer: As noted in the RFP, HCC is looking for a prime contractor to provide the solution which may include subcontractors as needed.

4. Section 1, Item 5, sub item G lists "AccuTrack" followed by several other technologies. Can you please expand on this? What work/integration is expected with AccuTrack and how do the other sub items relate to AccuTrack usage?

Answer: This is a typo. Treat the products listed in 5.f-g as one list of products.

5. Business Relationship strength - Tab 8 page 20 - please provide examples of the three to five items requested that were deemed acceptable in past relationships.

Answer: As noted in RFP Section 4, Tab 8, the proposer is to provide what they believe are appropriate, measurable and obtainable criteria that will benefit the relationship over the term of the contract.

6. In order to provide the most optimal solution, some of development and testing activities part of the implementation can be done from locations other than US. Can you please advise if HCCS has any compliance requirements or preference for all resources working on the project to be based on site in Houston or in US?

Answer: HCC seeks proposals from vendors that will meet the needs of the RFP scope which include a significant amount of the work to be completed onsite; HCC is not looking for an offshore solution.

7. Do you have any preference about the response document format? (i.e. Word or PPT format)

Answer: Response shall be in accordance with RFP Section 4 – Instruction to Proposer. The use of standard formatted proposal response is detailed. Proposers are reminded that their proposal must be easy to follow and must adhere to the format requirement which aligns to the “tab” sections as noted.

8. Could you provide us a break on number of users that would be using the new CRM application?

Answer:

- Marketing - 10
- Sales - 20
- Service – 360
- Partner Management – NOTE: “Partner Relationship Management” is listed under Outreach and Recruitment (Sales) Features and Requirements (Section 1.9.j), which most likely falls under Student Services or Foundation.

9. Could you provide us a data migration count for the following?

Answer:

- Service Requests – n/a
- Tasks – n/a
- Leads – Up to 10,000 a month
- Opportunities – n/a
- Students/Accounts – n/a
- Any data that needs to be migrated as part of the Project – n/a

10. What do you mean by "events management"? Are these events that students will attend (e.g., recruiting events) or does this mean events as in the creation of a document or contact in the system?

Answer: The former -- events that students will attend.

11. Confirm the "Go-live" date requested: is it 31-Jan-2018 or 28-Feb-2018? Section 2 and Section 4 (phase 1) have different dates.

Answer: The suggested initial dates are by phases with the final date for February 2019 as noted in RFP Section 2.

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REQUEST FOR PROPOSAL

PROJECT NO. RFP 17-52

CRM System

QUESTIONS AND ANSWERS NO. 5

Date: May 5, 2017

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

1. Expand upon the statement on page 16 (Section 3.2.e) and page 18 (Section 4.4.a) that states, "HCC will contract with the individual firm or organization that submits a response to this RFP"? Specifically, are you able to contract with more than one entity upon award? For example, if one company provides implementation services and a separate company provides product, are you able to contract with both upon award? If yes, is there a preference on who should be listed as the respondent?

Answer: HCC is looking for a prime contractor to provide the solution which may include subcontractors as needed.

2. How many alumni do you have?

Answer: HCC has approximately 150,000 alumni.

3. What is the level of support – in implementation, launch, and ongoing support – do you require and want out of a partner vendor?

Answer: HCC requires training and on-going customer support for functional end-users and technical personnel. Support should be available via web, phone, chat, FAQ and built in help features. Vendor is required to establish a training schedule prior to the implementation process. Establish type of documentation or help system in the CRM solution.

On the IT side, would be project management, integration services, training and functional consulting.

4. Please elaborate on your use cases for Partner Relationship Management mentioned in the RFP.

Answer: Sample user cases for PRM include:

- Personalized, and targeted messages to support HCC's recruitment and admission practices
- Enrollment task reminders to assist students in meeting financial aid, registration, and student billing deadlines
- Early-warning alerts to identify and help at-risk students
- Employment opportunity and placement tracking for students
- Dynamic alumni relations and continued community involvement
- Automated email campaigns that trigger follow-up communications based upon student responses
- Social media as an engagement tool

5. What are the roles within the HCC faculty user?

Answer: Multi-channel outreach opportunities. Faculty will have access to real-time data that will assist with student engagement and data analytics for student success planning.

6. How many users would be writing into the application versus how many users will be read only access?

Answer: Single users: Not more than 2,500; Concurrent users: Not more than 500

7. As per the business need (Considering data retention requirements) what would be the data volume for contacts etc.?

Answer: Student Services: between 200 – 300K annually (120K prospects/leads + 115K student body)

8. How many student users would be writing into the application how many will be read?

Answer: Based on our current knowledge of CRM applications, student users would not be given writing access. If circumstances warrant, students may be granted read access. Our annual student body count is approximately 115K.

9. Provide use cases as to how the student body will use the application and how they would request for services that they are entitled to?

Answer: Ideal CRM will help simplify student interactions with staff and faculty, and facilitate student attendance of meetings, appointments, workshops and events. CRM will provide a helpdesk function, giving students a single point of contact for resolution of issues that would otherwise delay their ability to complete their studies.

10. Describe the job functions for each group of users (i.e., working cases, managing leads, prospecting, major gift officer, working together in a community, etc.) for each phase

Answer: These would need to be identified and documented during the discovery phase of the project with the selected vendor.

11. How many cases would you manage per year in each phase or department? (For example, submitting tickets to IT, prospective or current students submitting questions or cases, etc.)

Answer: Approximately 120,000 prospects/leads would be generated in the CRM in a calendar. The number of cases associated with just prospects based on this estimate cannot be determined, but the solution would need to scale accordingly for a college of HCC's size. In addition to prospects/leads, the current annual student body count is approximately 115K.

12. How many prospective student contacts do you have?

Answer: 150,000 as of 4/18/2017

13. What number of constituents do you plan on engaging in a marketing automation journey (i.e., students, alumni, donors, etc.)?

Answer: HCC will be engaging with prospective students, applicants, and current students, as well as the business community and industry. Contacts will number in the thousands. For example, we estimate that 120,000 prospects/leads would be generated in the CRM in a calendar. The numbers for alumni and donors would generally be lower but would be variable and will the effectiveness of HCC strategies.

14. How many users would need to be able to deliver mass communication through channels such as email, texting, etc.?

Answer: 15

15. Define "Student recruiting" as related to this phase of work? Do you define recruiting as ending at the point of application or at the point of enrollment?

Answer: Recruiting can potentially apply to all stages of the student life cycle, at the point of enrollment HCC is looking for a CRM that will assist with recruitment efforts such as:

- How many applications have we received to-date compared to this time last year? The last three years? By major? By demographic?
- Based on application trends for a specific major over the last three to four years, what should HCC forecast for next year?
- How can we segment recruitment data by department and high school to develop and enhance recruitment plans and initiatives?

- How can HCC attract students who will be successful and want to complete their degree here?

16. Define what departments are currently engaged in any Student Retention efforts? Is the goal to have all these departments utilizing the same CRM solution?

Answer: All departments are responsible for student retention efforts (advising, student life, international, disabilities, instructional, etc.). Yes, all these departments will be utilizing the same CRM solution.

17. Will this requirement be managed in your existing Campus Solution? Or, are you expecting this functionality from the future solution?

Answer: HCC is looking for an integrated solution between PS and the CRM.

18. Provide an overview of the functional process currently followed for partner sales.

Answer: We do not have partner sales, per se. No financial transactions, other than events management, will be required of this system.

19. Do you intend to utilize lead scoring?

Answer: HCC will use lead scoring to determine marketing strategies and prioritize outreach efforts. Lead scoring will be part of the recruitment, advising and student planning process. Lead scoring will help distinguish prospective students who are likely to follow through to application from those with a more casual interest, and allocate resources accordingly; prioritizing high value student leads first and ensuring they are followed up with more quickly.

HCC is looking for a CRM that offers many lead intelligence features in order to track actions like page views, social media, and email engagement.

20. What is the number of text messages you would be sending and receiving per month in each phase?

Answer: HCC will be engaging with prospective students, applicants, and current students, as well as the business community and industry. Contacts will number in the thousands and it is not possible at this time to estimate a number other than to emphasize that HCC needs a CRM that scales for a college of HCC's size. This will also depend on strategies and the level of opt-in, opt-out by the leads.

21. Do you expect to do any mass texting? If yes, do you own a 5-digit code short code for mass texting? Also, if yes, what is the estimated volume of mass texts being sent per year?

Answer: Yes. HCC is open to mass texting. HCC will be engaging with prospective students, applicants, and current students, as well as the business community and industry. Contacts will number in the thousands and it is not possible at this time to estimate a number other than to emphasize that HCC needs a CRM with a mass texting

feature that scales for a college of HCC's size. This will also depend on strategies and the level of opt-in, opt-out by the leads.

22. Any existing CRM or likewise tool used? If not, how does marketing communication take place presently?

Answer: No CRM. Current efforts require multiple tools – Eloqua, Smartsheet for lead capture and various other one-off tools.

23. Will any data need to be migrated to OMC (Eloqua)?

Answer: This will depend on the functionality and features of the bidder's solution. For example, if the CRM solution has the same or better functionality than Eloqua, then HCC will likely no longer retain Eloqua as a product.

24. Will contacts data be flowing in from OSC once integrated?

Answer: Marcom: This will depend on the functionality and features of the bidder's solution.

25. Eloqua is capable of sending personalized email content based on contact card details. Does that serve the purpose well?

Answer: Marcom: Eloqua is used by HCC for targeted marketing by email only. This does not satisfy the HCC need to manage the student life cycle as defined in the CRM.

26. Eloqua can reach out to defined set of students at defined intervals, with specific designed content helpful for students. Does this serve the purpose?

Answer: Eloqua does not have the complete CRM functionality as defined in RFP that is needed by HCC.

27. Eloqua is capable of taking care of most of the points from 8(a) to 8(m). Will 8 (l) need Eloqua integration with SRM or some cloud connectors for social media?

Answer: This will depend on the functionality and features of the bidder's solution. Eloqua is used by HCC for targeted marketing by email only. This does not satisfy the HCC need to manage the student life cycle as defined in the CRM.

28. Eloqua can segment students based on provided criteria and send specific communication and take specific grouping action based on student response. Does this serve the purpose?

Answer: Eloqua is used by HCC for targeted marketing by email only. This does not satisfy the HCC need to manage the student life cycle as defined in the CRM.