Proposal No. P15/9884
Customer Relations Management System

Answers to Vendor Questions – Questions are in black, Answers are in red

1. Question:
   How large in terms of number of records are the district’s enrollment databases? Do these databases include new candidates and former students or applicants? Does the district wish to use the system to improve engagement with other stakeholders such as higher school principals, counselors, and/or workforce development staff?
   Answer: We have approximately 25,000 students and their records are in a transactional database.

2. Question:
   What is the breakdown of the district’s enrollment end user population
   a. Number of Enrollment Counselors/Recruiters
   b. Marketing Staff
   c. Other users such as management, workforce development…
   Answer: We will require 20 employee licenses

3. Question:
   Are marketing campaigns and events planned and executed centrally and/or individually at district campuses?
   Answer: Both

4. Question:
   Does the new system need to provide real-time personalization of district communications (html, PURLs, website, landing pages) based on prior behavior and/or preferred program of the prospective student?
   Answer: No

5. Question:
   How many career events are managed and executed annually? What is the total number of attendees annually at district events?
   Answer: This number fluctuates each year.

6. Question:
   What are the marketing engagement channels the district wishes to leverage; i.e. email, SMS, mobile, Social?
   Answer: Yes to all channels

7. Question:
   Banner Integration (4 a) Does the district wish to continue using the Banner Self-Serve for the online application? Can you explain the desired scope of Banner integration over and above integration at the Banner Self-Serve application process (CRM notification of stage change to applicant). Can you overview your requirements to update the admissions office stages in CRM such as ‘Financial Aid Pending’, ‘Accepted’, and ‘Enrolled’ …
   Answer: To integrate data after prospect is admitted as a student.
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8. Question:  
Functional Requirements: Recruiter Travel Management. Could you provide an overview of the requirements relating to ‘Recruiter Travel Management’? Is this similar functionality of Banner Recruiter and the ROI of Events and Campaigns?  
Answer: Yes

9. Question:  
What are the key metrics that the district wishes to track; i.e. campaign response rates, new inquiries, applicants, enrollments…? Yes to all Does the district wish to track these metrics by Area/Program/Campus and Term? Yes Are there other key segmentations or demographics that the district wants tracked.  
Answer: We will want to customize our segments.

10. Question:  
Has the district set first-year goals for the enrollment impact (X% increase) following the implementation of the new system?  
Answer: The goal is to reverse the enrollment decline.

11. Question:  
How many people at the College will be accessing the system? P.3  
Answer: 20

12. Question:  
What is the anticipated timing for the contract award? And for the system going live? P.6  
Answer: February with implementation by May 2015

13. Question:  
Are there any budgetary objectives for the system? P.9  
Answer: Responses will be evaluated based on budgetary considerations.

14. Question:  
Will the College continue to use the online application hosted on their Banner system? P.4  
Answer: The preference is to include new application as part of the CRM.

15. Question:  
Does the College anticipate using the system for student retention and success, immediately or in the future? P.4  
Answer: Immediately

16. Question:  
Will students and staff want to access the system via mobile devices? P.4  
Answer: Yes
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17. Question:
   How many total staff and faculty users will need access to the CRM? Examples of various roles:
   a. General Users
   b. System Administrators
   c. Admissions Counselors
   d. Faculty
   e. Student Workers
Answer: 20 staff Enrollment Management and Campus designees

18. Question:
   What is your current email marketing solution, if any? Question is unclear How many emails (by volume) do/will you send on a monthly basis?
Answer: Unknown at this time

19. Question:
   Since an applicant portal is included, how many estimated logins a month will be needed for external constituents?
Answer: If this is regarding new applications, it could be up to 5,000 or more.

20. Question:
   Please describe the features and functionality of any desired portal(s):
   a. General requirements? Apply online, track application status, update user account properties, connect with assigned recruiter, register for events. Yes to all
   b. Does the application process differ significantly by program/degree? The process varies for some occupational programs
   c. Will required documents differ between programs/degrees?
Answer: Yes

21. Question:
   What is the timeline for making a decision, beginning implementation and Going Live?
Answer: February award with a May implementation 2015

22. Question:
   Is anyone using an instance of Salesforce on campus at this time? Have you had any contact with your Salesforce Foundation representative?
Answer: No

23. Question:
   Does Pima Community College District’s IT department currently use an ETL solution (such as Axiom) for integrating Banner with any other systems on campus?
Answer: There are 2-3 projects driven by campuses

24. Question:
   What systems on campus will Enrollment Rx need to integrate with?
Answer: Unclear question. What is Rx?
### 25. Question:
How many years of data (recruitment, prospects etc.) does Pima Community College need to migrate to the new system?
Answer: 3 years

### 26. Question:
Does Pima CC have a list or requirements for the Recruiter travel management functionality? (Page 4, Section: Functional Objectives)
Answer: Not other than what is included in the RFP

### 27. Question:
What is the authentication tool being used for student SSO to access Pima CC’s systems/ student portal? (Page 5, Section: User Management)
Answer: CAS (Central Authentication Service)

### 28. Question:
Is Pima CC currently utilizing Clean Address for address validation or Common Matching rules in Banner for duplicate checking? (Page 4, Section: Functional Objectives)
Answer: Runner Technology and Banner matching rules

### 29. Question:
How does Pima CC currently identify and manage prospective students? (Page 5, Section: Technical Requirements, bullet ‘i’)
Answer: We have a primitive database that is not connected to Banner

### 30. Question:
Would there be a conversion from Pima CC’s existing tool? (General question)
Answer: Yes

### 31. Question:
Does Pima CC envision the recruiters being able to submit an application on behalf of a student (capture student’s electronic signature)? No Does Pima CC envision a self service web application for students? Yes Would either of these need to integrate that admissions data to Banner? (Page 4, Sections: Project Scope and Technical Requirements: Integration to Banner)
Answer: Yes

### 32. Question:
How many internal users will be needing system access? (General question)
- Have profiles and roles been considered for security set-up/record access/functional ability in system?
  - Examples
    1. Marketing role that will only work with campaigns
    2. Recruiters that will work with applications and event registration
Answer: 20 and yes
|   | Question: Does Pima CC currently use a marketing/email tool? (Page 4, Section: Functional Objectives)  
Answer: Constant Contact |
|---|---|
|   | Question: Does Pima CC have additional details around event registration and management? (Page 4, Section: Functional Objectives)  
What type of events will prospective students be registering for?  
a. Is there a specific business process currently in place for events, tracking/reporting/administration? Under development  
b. Are all events free or will the system need to consider payment collection?  
Answer: No fee collection |
|   | Question: Do you have a list and/or examples of reports that you would like from the system? (Page 4, Section: Functional Objectives)  
Answer: Please refer to scope of work in RFP |
|   | Question: Does Pima CC have additional details regarding integration with Microsoft Office? (Page 4, Section: Functional Objectives)  
Integration with Outlook – emails, calendars, etc?  
a. Bi-directional sync or one-way?  
b. Other Microsoft tools considered?  
Answer: please refer to RFP |
|   | Question: What reporting tools does Pima CC currently use? (Page 5, Section, Technical Requirements, bullet ‘c’)  
Answer: Crystal and Oracle |
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### Customer Relations Management System

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
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<tbody>
<tr>
<td>38. Page 4, Scope of Work, 3 Functional Objectives</td>
<td>Please explain more of the requirements for the “recruiter travel management system’. Answer: Tracking, transparency and calendaring</td>
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<td>39. How many constituents are you sending email to? How often?</td>
<td>Answer: Continuously with fluctuation</td>
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<tr>
<td>40. How many constituents are you sending mobile text sms or push messages to? How often?</td>
<td>Answer: None</td>
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<td>41. How many total contacts are in your data base?</td>
<td>Answer: Going back three years, approximately 20,000-30,000</td>
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<td>42. How many annual emails?</td>
<td>Answer: Question isn’t clear</td>
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<td>43. What % estimate growth in constituent data base and volume over the next 3 years?</td>
<td>Answer: Unknown at this time with no baseline data</td>
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<td>44. In terms of implementation and configuration, some customers are completely self-serve, want some assistance or want a lot of assistance. How would you categorize your team or need for professional services?</td>
<td>Answer: The expectation is for non-technical staff/constituents to easily navigate the system.</td>
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<td>45.</td>
<td>In terms of social media, how many mentions or keywords annually would you need?</td>
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<td>46.</td>
<td>How many website page view annually?</td>
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<td>47.</td>
<td>How many named users (Pima CC staff) will require a licenses to access the CRM platform</td>
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