**Request for Proposal**

**TSTC – Potential Student Tracking Software**

**RFP-16-EW-006**

# ADDENDUM # 1  (posted 08/09/2016)

### SUBMITTAL DUE DATE: Thursday, August 25, 2016 at 2:00 p.m.

The following information becomes a permanent part of the RFP:

**Question #1:**  Page 11 item #3: Please provide more information about what information you would like to see on a role-based visibility report?

**Answer**: **We are looking for the ability to see where individual recruiters are in their weekly, monthly, and yearly goals. These goals include but are not limited to new prospects received, prospect phone calls, student/campus visits, classroom presentations, etc.**

**Question #2:**  Page 11 item #4: What type of financial aid analytics do you seek on the recruitment side?

**Answer: This would be used to track potential students' progress into becoming a registered student and to see if the Financial Aid portion has been completed.**

**Question #3:**  Page 12 item #7: The requirement states "Ability to embed 3rd party applications within the application to facilitate entering missing or updating relevant information. i.e. Colleague Self Service Financial Aid, Colleague Student Planning, etc." Your current Colleague Self-Service FA and Student Planning are used for current students. What do you see is the purpose of embedding these applications in the recruitment solution to use for students who have not yet been admitted?

**Answer:  To be able to get them from applicant to enrolled student. Be able to fully look at the life of the life of the student.**

**Question #4:**  Page 11 item 9: The requirement asks for data import from your website. What website are you referring to?  Are you referring to prospective student (as opposed to current student) information and if so, what information do you want funneled to the specific recruit?

**Answer: If a student requests a tour or more information on our main website www.tstc.edu their information would then funnel through the CRM.**

**Question #5:**   Under 1.6 Key Events Schedule, the entire week of August 15th is scheduled for interviews and demos. Does the College have specific times and days already in mind for those interviews and demos? If so, what are they?

**Answer: Nothing is set in stone.**

**Question #6:**  What is the estimated total number of software users? Number of staff users? Number of student users?

**Answer:  Recruiting: Director and above - 10 Recruiters, Rep - 25 not sure outside of recruiting.**

**Students - If we go off of this year's numbers we currently roughly have 13,000 traditional apps and 2,000 dual credit.**

**Question #7:**  What is the number of applications received each year?

**Answer: If we go off of this year's numbers we currently roughly have 13,000 traditional apps and 2,000 dual credit.**

**Question #8:**  What is the estimated number of individual students accessing the student web portal (student dashboard)?

**Answer: If we go off of this year's numbers we currently roughly have 13,000 traditional apps and 2,000 dual credit.**

**Question #9:**  Provide the number of unique email addresses your institution markets to on an annual basis?

**Answer: If we go off of this year's numbers we currently roughly have 13,000 traditional apps and 2,000 dual credit.**

**Question #10:**  Is November 1, 2016 the date in which you prefer to start your implementation or to go live?

**Answer: Prefer Go-Live, if possible.**

**Question #11:**  Will you require your own online application, or do you plan to use Apply Texas exclusively?

**Answer:  We will require our own online application.**

**Question #12:**  Would you be amenable to submission of our MSA as an appendix in an effort to negotiate terms in good faith if selected as a chosen vendor?

**Answer:  Please clarify MSA is referring to.**

**Question #13:** How many campuses would use this system?  How many users will you have?

**Answer: 10 campuses.**

**Question #14:** Where do you plan to process applications and supplemental documents?

**Answer: Each campus has a workflow for processing applications**

**Question #15:** Can you please describe your application evaluation, review, and decision process?

**Answer: We are an open enrollment institution, so all applicants are accepted if they have a high school diploma or GED.**

**Question #16:**  Can you clarify whether you intend the "Student Dashboard (2.3.7)" with the ability to track a prospect's progress and upload documents to be staff-facing, or student-facing?

**Answer: Both.**

**Question #17:** What kinds of outcomes do you hope to be able to report on and analyze by population, demographics, programs, etc.?

**Answer: We would like to run reports off of all of the above including what high school or region the application is coming from to help form predictive analytics from history of participation from high schools.**

**Question #18:** Do you regularly schedule one-on-one advising or credit evaluation appointments as part of your admission process?

**Answer: We do not schedule them as part of the admissions processes but we do schedule them as part of the enrollment process.**

**Question #19:** Do you intend to use this system for joint enrollment students? If so, will they require an online application?

**Answer: unknown at this time.**

**Question #20:** During the implementation do you have a preference for members of the implementation team to be available onsite?

**Answer: No preference.**

**Question #21:** Is there interest now or in the future to extend the usage of the CRM to retention/student success on the same platform?

**Answer: unknown at this time.**

**Question #22:** Is the ability to customize and configure the solution yourselves an important factor?

**Answer: Yes, due to the unique nature of multiple campuses**

**Question #23:** Do you currently use a CRM solution?

**Answer: No**

**Question #24:** Can you provide clarification on how your territories are assigned/determined (state, school, postal code, etc.)?

**Answer: Our territories are assigned within Texas. We base which campus recruits where off of location of the campus. For instance Sweetwater, TX will cover over 200 miles from campus because they have dormitories but Hutto campus will recruit within a 70 mile radius because there is no dormitory on campus available to students.**

**Question #25:** Regarding question 7 (e): please clarify if you are talking about actually embedding a 3rd party application into our application product or if are you talking about integrating or importing data from a 3rd party application into our application product?

**Answer: Unknown at this time.**

**Question #26:** On page 4, "It must have the ability to automate communication process to prospective students by test messaging, emails, postcards, etc."

    a. How do intended users to send these communications?

    b. Are these "on demand" or "ad hoc"?

    c. Are these scheduled jobs?

    d. What is frequency?

e. Are these messages based on the student's information residing within this tracking system? If not, from where?

**Answer:**

a. **Unknown at this time, options?**
b. **We would like the ability to do both**
c. **Yes, this could be scheduled communications**
d. **Unknown at this time.**
e. **Yes, based off the students information residing in the system**

**Question #27:** Page 10, Section 2.3 – 1. Ability to create prospect inquiry forms based on various marketing campaigns.

a. Where are the marketing campaigns created?

b. Should/Could the marketing campaigns be created from within the student tracking software?

c. How are these marketing campaigns communicated?

d. What media?

e. "Text to register into an event" – Does the text message contain a link to registration? If not, please clarify. What is anticipated workflow?

f. Where does QR Code reside? On marketing campaigns? How would the student use this to register?

**Answer:**

a. **Unknown at this time.**
b. **Unknown at this time.**
c. **Unknown at this time.**
d. **Unknown at this time.**
e. **Unknown at this time.**
f. **Unknown at this time.**

**Question #28:** On Page 10, Section 2.3 – 4(c) – Financial Aid analytics and reports

a. What are the financial aid analytics and reports?

b. How do these tie into the marketing campaign?

c. How does this tie into the student information?

d. Are there any samples which can be provided?

e. What is the existing data structure or reports?

**Answer:**

a. **Unknown at this time.**
b. **Unknown at this time.**
c. **Unknown at this time.**
d. **Unknown at this time.**
e. **Unknown at this time.**

**Question #29:** Page 11, Section 2.3 – 11.  Mobile application functionality should include the ability to view scheduled events, easily access and update prospect data, log calls,

       a.   Are these data calls or telephone calls?

       b.   Log what calls?  How?  What is process or workflow?

       c.   Calls are from students? d.   Calls are outgoing to students?

       e.   How are calls to be logged?  Who is logging the call?  What is workflow?

       f.   Where are these events stored?  How would the events be accessed and presented?

**Answer:**

    **a.**  **Telephone calls.**
    **b.**  **Telephone calls to students that recruiters can log on the students account once they either receive or make contact with the student.**
    **c.**  **They can be from student and recruiters can log the conversation in the system**
    **d.**  **Yes.**
    **e.**  **We would like for recruiters to be able to self-log in their phone calls with students into the system.**
    **f.**  **Unknown at this time.**

**Question #30: On** Page 12, Section 2.5 – 1 b. – The URL used to access the proposer's Internet ordering application should be customizable to a TSTC Internet domain.

       a.   Is there an example you can provide?

       b.   Would the TSTC site, house a link to our application?

       c.   Would TSTC present our existing registration application as their own?

    **Answer:**

    **a.**  **Allow TSTC to Brand the site**
    **b.**  **TSTC would create a TSTC DNS entry**
    **c.**  **Most Likely**

**Question #31:** What materials are usually required from the students in order to complete a registration?  Driver License?  Student ID?  Etc…

    **Answer:  1. Application, 2. High School Transcript, 3. Proof of bacterial meningitis shot, 4. Sign the Financial Obligation Agreement, 5. If doing a Certification or Associates Degree must submit TSI scores, 6. Not a requirement but apply for financial aid.**

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**RFP-16-EW-006 TSTC – Potential Student Tracking Software has been updated as follows:**

Section 1.6 Key Events Schedule states:

Submittal and HUB Deadline                                    **Wednesday, August 12, 2016, 2:00 p.m.**

**Updated RFP-16-EW-006 TSTC – Potential Student Tracking Software**

Section 1.6 Key Events Schedule states:

**Submittal and HUB Deadline                                    Thursday, August 25, 2016, 2:00 p.m.**

*Please sign and return one copy of this addendum with proposal as verification of receipt and compliance with addendum information.*

Company Name: _____

Address: _____

Signature of Authorized

Company Official:     _____ Title: _____

Telephone Number:     _____ Date: _____