



February 26, 2020

TO: THE DISTRICT BOARD OF TRUSTEES
OF VALENCIA COLLEGE

FROM: SANFORD C. SHUGART
President

RE: AWARD OF ITN 2020-06, CUSTOMER RELATIONSHIP MANAGEMENT
(CRM) SOLUTIONS

Valencia currently uses a variety of computer based and manual processes to support student communications, tracking, and interventions for recruiting, admissions, pre-enrollment, and enrolled student processes. A CRM solution will support the entire recruiting and admissions lifecycle with sophisticated, personalized, and targeted communication, workflow, and tracking capabilities. It will streamline admissions operations and help increase the efficiency of the entire process with advanced reporting, analytics, and monitoring capabilities.

On October 2, 2019 the College issued an Invitation to Negotiate, ITN 2020-06. The ITN sought to identify a qualified service provider experienced in Customer Relationship Management (CRM), in the particular areas of recruitment and advising, to provide a solution encompassing software, necessary integrations, and implementation, as well as business process analysis, and professional consulting services.

Proposals for the ITN were received in Vendor Link, our automated purchasing portal on November 29, 2019. The following ten (10) firms submitted proposals in response to the solicitation: Campus Management Corp., EAB Global, Inc., Ellucian Company L.P. Freshworks, Inc., Kellton Tech Solutions, Inc., Oracle Corporation, Technolutions, TargetX.com LLC., Unified LLC, and VisualZen, Inc.

A public evaluation meeting was held on December 5, 2019 to review the proposals. Five (5) committee members reviewed, scored, and ranked the proposal based on the following criteria: Complete Proposal Cost, Proposer's Capabilities, Proposer's Background and Proposer's ITN Process. Following full discussion and deliberation, the following four (4) firms were shortlisted and invited to Phase II of the ITN, Presentations and Negotiation: Ellucian Company L.P., Campus Management Corp., Technolutions, and TargetX.com LLC.

On December 17, 2019, private presentations and negotiations were held, followed by a public meeting in which presentations were evaluated and the firms ranked. The top two (2) ranked firms were invited to Phase III of the ITN, Best and Final Offer: Ellucian Company. L.P and

TargetX.com LLC.

A public final evaluation meeting was held on February 5, 2020 to evaluate firms on Best and Final Offer (BAFO) and references. The selection committee selected TargetX.com LLC as the service provider that best meets the interest and needs of Valencia College.

RECOMMENDATION:

The President recommends that the District Board of Trustees authorize the College to enter in an agreement with TargetX.com LLC for the purchase of a license to use their CRM Software Solution for a five year term. The President recommends that the District Board of Trustees of Valencia College authorize the College to award ITN 2020-06 to TargetX.com LLC.



President

VALENCIA COLLEGE

Student Relationship Management

Industry Term (CRM)

Why a CRM?

The institution desires to enhance the student experience by implementing a solution that enables intentional interaction effectively and efficiently throughout the student lifecycle.

What is a Student Lifecycle?

- Pre-enrollment
- Admissions
- Enrollment
- Advising
- Graduation
- Transfer
- Alumni
- Continuing Education

Examples of functionally

- Mobile-enabled
- Multiple inquiry forms online and offline collection
- Multiple online application types
- Tailored communication (intentional interaction)
- Texting, email, web chat
- Student Portals
- Early Alerts throughout the student lifecycle
- Event Management
- Automated marketing campaigns

Expected Outcomes

- Improve communications with all students throughout the student lifecycle
- Increase completed student applications which leads to enrollment
- Increase student retention, persistence, success, graduation and transfer
- Provide additional interim and summative indicators to inform initiatives supporting student success

TARGET 

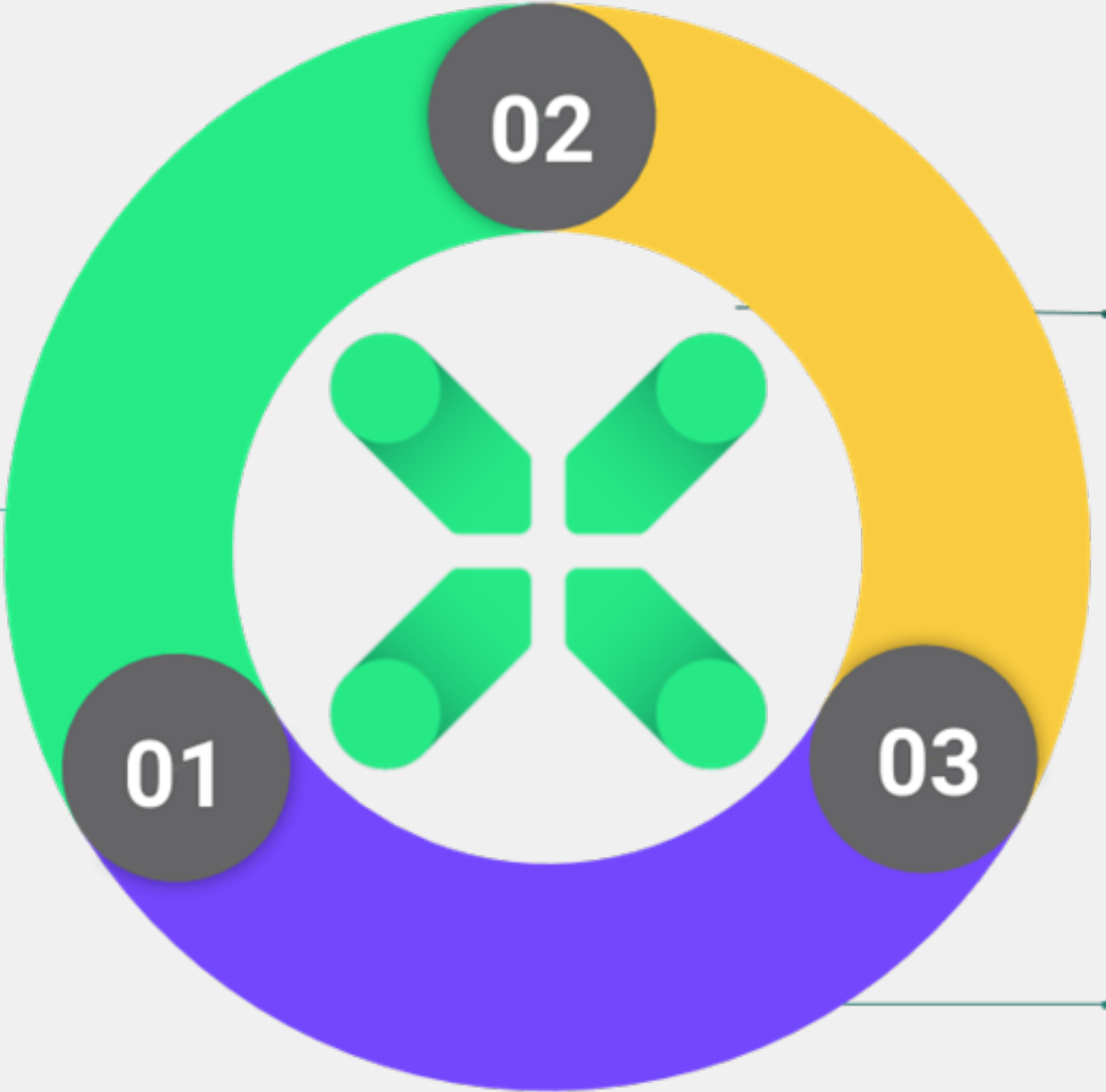
**BUILDING LIFELONG RELATIONSHIPS
THROUGHOUT THE STUDENT LIFECYCLE**

Student Lifecycle Solution for Higher Education

VALENCIA COLLEGE

Recruitment & Admissions

- Web Chat
- Inquiry Forms
- Event Management
- Online Applications
- Student Portals
- Territory & Travel Management
- High School & Staff Tracking
- Workforce Development/Partner Management
- Telecounseling
- Inquiry/Applicant Scoring
- 12+ Standard Imports (ACT, SAT, and more)



Student Success

- Student Success Team Management for Staff & Faculty
- Retention Scorecard
- Early Alerts & Action Plans
- Student Surveys
- Student Community Mobile App
- Appointment Scheduling
- Walk-In Appointment Queuing
- Advising Management
- Guided Pathways Reporting

Lifecycle Communications & Reporting

- Unlimited Mass Email Campaigns
- Unlimited 1:1 Text Messaging
- Mail Merge & Document Generation
- Drag-and-Drop Report Builder
- 60+ Pre-built Reports & Dashboards

Salesforce.org Education Cloud & TargetX



Student Experience

One-Stop Services

Unified Advising

Career Readiness

Faculty and Staff Experience

Alumni & Donor Engagement

Fundraising

Advancement Operations

Multi-Channel Engagement

Enrollment Management and Insights

Recruitment & Admissions

Prospect Targeting and Engagement

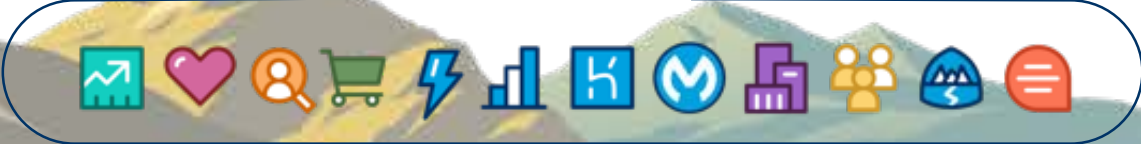


Recruiting & Admissions



salesforce.org
education
cloud

eda



SALESFORCE PLATFORM

Advancement

TARGET



TARGET 

IMPLEMENTATION

Throughout implementation **we will serve as true partners** to the Valencia team. We will work closely with you every step of the way to build a system that supports you and your students, and to empower you to be successful.

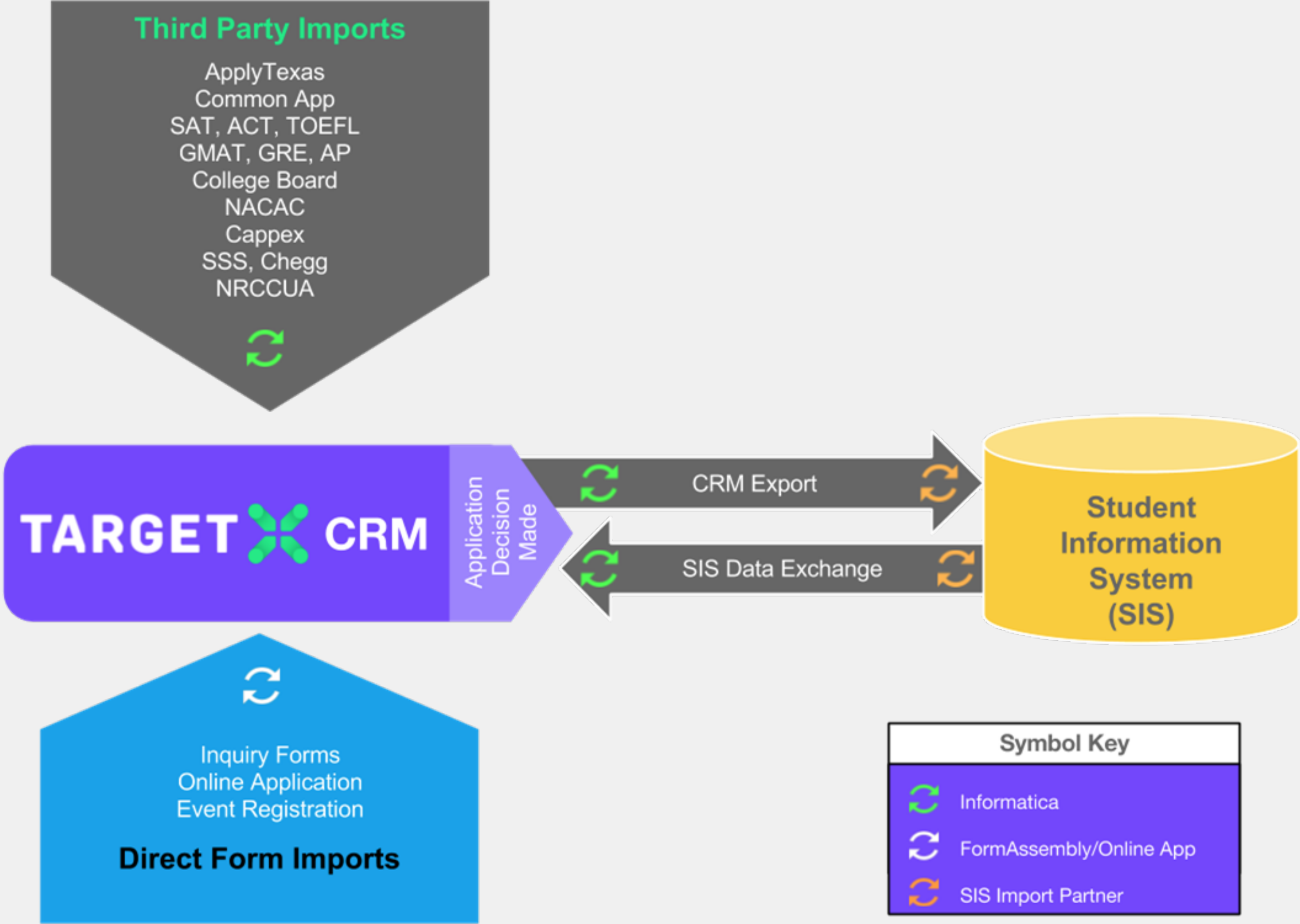
TARGET 

DATA MANAGEMENT & INTEGRATION

Student Lifecycle Solutions for Higher Education

VALENCIA COLLEGE

Data Integration - Standard Informatica



About TargetX



Higher Education Experience & Community

Serving Higher Ed Institutions Since 1997

Over 95% of TargetX Staff Come from Higher Ed

~400 Universities Across the US, Canada, and Europe

Focus on Innovation

Built on Salesforce - the #1 CRM Platform Technology

Ongoing Product Releases a Year

Mobile-First and Self-Service Administrative Tools

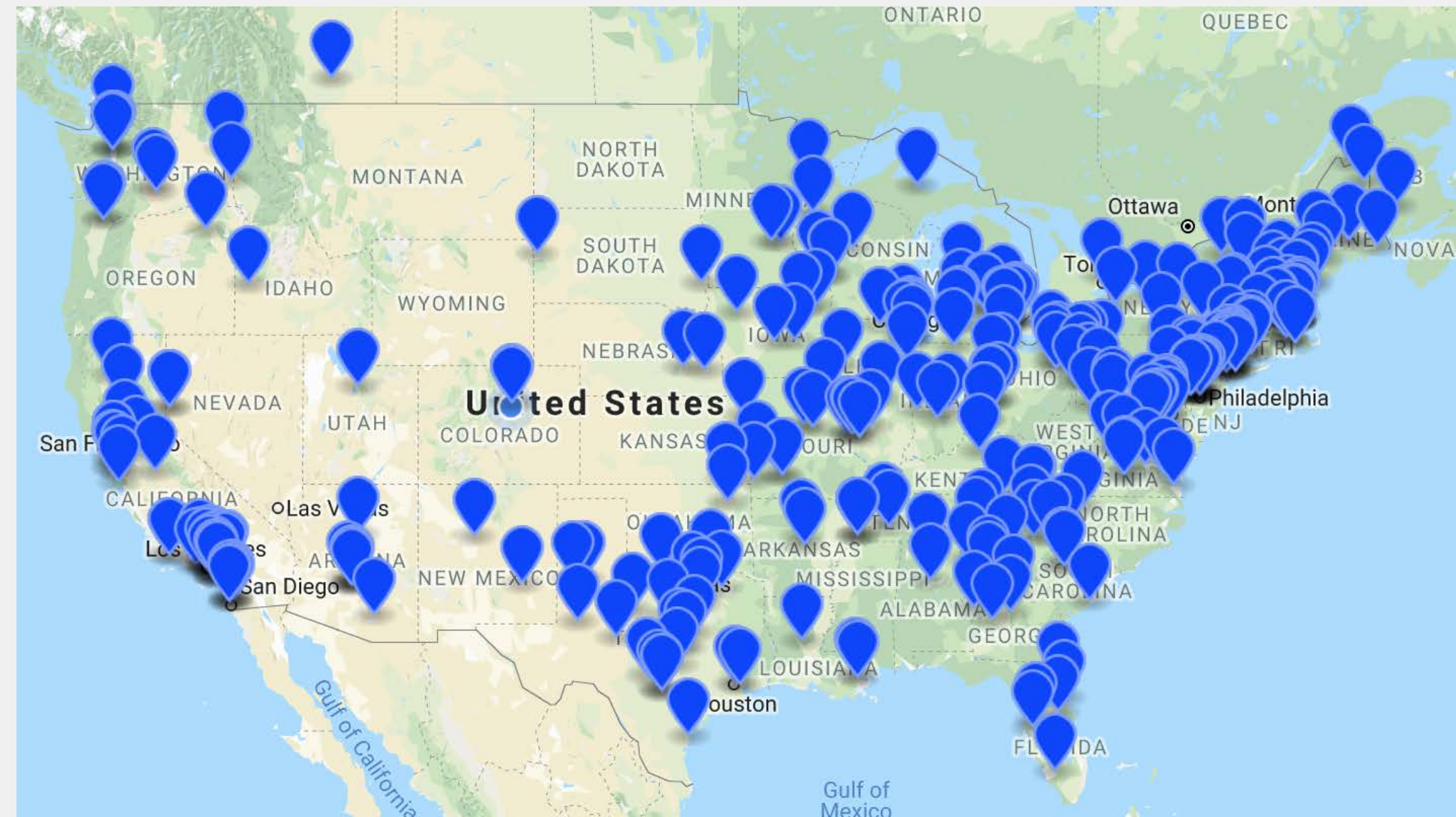
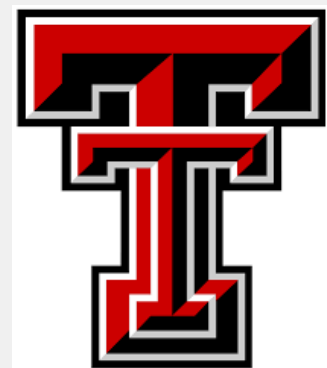
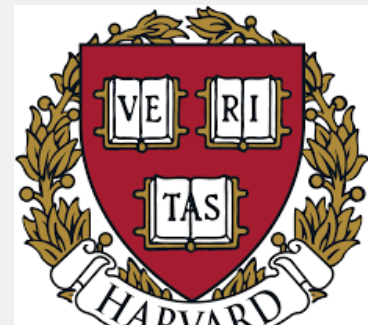
Commitment to Client Success

Dedicated Implementation & Support Team

Ongoing Client Success Engagement to Maximize Adoption and Value



400+ Clients and Going Strong



Investment

- Five (5) year license (TargetX & Salesforce)
- License amount - \$232,800 per year
- First year implementation fees - \$87,200
- It is anticipated that up to three (3) additional staff resources may be required