REQUEST FOR PROPOSAL

PROJECT NO. RFP 19-45

**INTEGRATION OF MICROSOFT DYNAMICS
CUSTOMER RELATIONSHIP MANAGEMENT CLOUD-BASED SOLUTION**

<u>**QUESTIONS AND ANSWERS No. 002**</u>

Date: April 18, 2019

To: Prospective Respondents

From: Procurement Operations Department, Houston Community College

Subject: Questions and Answers Responses

Q1.   Do students enroll by filling in online forms and making payment through Cashnet?

Response: Students enroll via Student PeopleSoft. Students have the option to pay online via Cashnet, and 80% of students pay online. Students do not pay for information requests or to apply.

Q2.   For queries by students, is raising online tickets the only mode? If yes, is there a concept of SLAs? Please mention if there are any other modes which are to be built in the system?

Response: This question is unclear, "raising online tickets" is not a requirement of the RFP as HCC understands the question.

Q3.   Is there a requirement to build financials/ payments in the system? Are there different eligibility rules to decide who needs the monetary help?

Response: Students pay for enrollments via the Oracle PeopleSoft Campus Solutions system and the CashNet portal. See Section 1 items 4.3.3 and 4.4.6 for information concerning the scheduling events and surfacing payment information in the proposed solution.

Students who are eligible for Financial Aid, do not need to set up a Payment Plan. If students enroll during priority registration, they have a longer period to pay.

Q4.   What is the difference in functionality for International students?

Response: All students should have access to an engaging experience that can also be personalized as needed. See Section 1 items 4.2.1., 4.3.5 and 4.5.1.

International students must be enrolled full time in the spring and fall (12 semester credit hours), and can only take one online course. During the summer, if they decide to enroll, they must have at least 9 semester credit hours to maintain current immigration status. International students are not eligible for Financial Aid, and are eligible to set up a payment plan.

Q5.   How is Student Financial Services different from Financial Aid?

Response: Student Financial Services is Students Accounts Receivable. Student Financial Services provide the following services:

- Proper Assessment of Tuition and Fees on student accounts
- Exemptions and Waivers
- Installment Payment Plans
- Third Party Billing
- Student Refunds
- Collection of Receivables
- 1098-T IRS form
- Loans and Scholarship Funds Accounting
- Cashiering

Financial Aid is responsible for evaluating FA applications, awarding and disbursing aid to students based on federal, state and donor rules and requirements and evaluating awards to match award with the course credits that students are taking. Financial Aid Office provides the following services:

- FAFSA/ TAFSA Application
- Financial Coaching

If information is to be surfaced in the proposed solution, the information will come from HCC's Oracle PeopleSoft Campus Solutions system via the proposer interface tool.

Q6.   Please elaborate the in the testing requirements.

Response: All students taking credit classes are required to have their skill level assessed in reading, writing and math for placement in students in college credit courses. See Testing Center site: https://www.hccs.edu/resources-for-current-students/testing-services/testing-services-at-hcc-college/.

The CRM will be used to surface test scores from HCC's Oracle PeopleSoft Campus Solutions system for Advisors and Counsels.

See Section 1 item 4.2.4

Q7.   Please elaborate the on the veterans functionality.

Response: Veterans use Apply Texas. Veterans must remain enrolled to receive their benefits. Additional information is available at https://www.hccs.edu/support-services/veteran-affairs/.

Q8.   How often do the students have to register for classes during the year?

Response: This depends on the admit type. There are eight sessions for semester credit students. HCC offers 16 week, 12 week, 8 week and mini sessions within each fall, spring and summer semester. Registration is open through the start of the each session and closes within the first week of each session. There are two sessions for Dual Credit.

To maintain active status, students must register at least once in each term.

For Adult Education students, registration occurs every two weeks. Continuing Education Classes can start at any date in the year and can be from 1 contact hour to 112 contact hours in length depending on the course.

More information on current and upcoming semesters and sessions is available at

https://www.hccs.edu/student-experience/events-calendar/

Q9.   Please elaborate what is the functionality required to be built in the system for Advising, Counseling, Career Services and Disability Support Services?

Response: Generally, the ability to log and share notes, set milestones, track student progression, support student persistence through advisor dashboards as well as student self-service. This includes maintaining confidentiality and may require integration of third-party tools.

In addition, a queuing system, appointment scheduler, early alert function, engagement tracking and the ability to manage communication would be ideal.

Q10.   Are there any additional functionality for International Students than what is included in phase 1?

Response: Customer relationship management is for all students including International students and to be part of the proposed solution in all Phases.

Q11.   Is there a need for students to fill an application submission form to complete the graduation?

Response: Yes, that is the current process, but it would be ideal to automate the graduation process.   Additional information is available at https://www.hccs.edu/resources-for/current-students/graduation/

Q12.   What needs to be done as part of processing of an application submitted for graduation?

Response: Please see Q11 response. A query is run periodically during the graduation application timeline. An audit is then conducted and the degree is then posted on the students' account.

1. OCT 15: Fall Semester. Audits being on the 1st day after returning from the Holiday Break.
2. FEB 15: Spring Semester. Audits being within 5 days after the official end of the semester in May.
3. JUNE 15: Normal Summer Semester. <u>May Ceremony</u> Priority, February 15. Audits being within 5 days after the official end of the semester in August

In addition, students also apply individually through academic advising. The advisor manually enters a graduation date, reviews the student's degree audit and "approves" them in PeopleSoft to apply for graduation. Once the term ends, the Registrar reviews the student's record.

Q13.   Does Research and analytics cover the reporting to be built in the system?

Response: This question is unclear, information regarding both reporting and analytics is included throughout the published RFP.

Q14.   Apart from maintain details of Alumni and Foundation, what other functionality is required?

Response: Tracking and communication/marketing will be key to engaging students as they become HCC Alumni (see Section 1 item 4.5 – Communications Features). The Foundation utilizes alumni data for event awareness and giving (Foundation website: https://www.hccs.edu/foundation/)

Q15.   Is this a replacement for your campus solution or is this just an add on CRM?

Response: This is an add-on CRM needed to integrate data from our SIS and other sources into a user-responsive/student experience platform that supports persistence and completion. HCC does not have a CRM implemented at this time.

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