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BOARD OF TRUSTEES OF COMMUNITY COLLEGE DISTRICT NO. 508
COUNTY OF COOK AND STATE OF ILLINOIS

CONSTITUENT RELATIONSHIP MANAGEMENT (CRM) SYSTEM
TARGETX.COM, LLC
SERVIO CONSULTING, LLC
OFFICE OF INFORMATION TECHNOLOGY
DISTRICT WIDE

THE CHANCELLOR RECOMMENDS:

that the Board of Trustees authorizes the Chair, upon final approval of the General Counsel as to the legal form of such agreements, to authorize the execution of agreements with TargetX.com, LLC and Servio Consulting, LLC, for a Constituent Relationship Management Solution. TargetX.com, LLC will utilize its reseller to provide Salesforce licenses as well as the TargetX.com, LLC Recruitment and Enrollment Suite for the period starting no sooner than January 15, 2021 through January 14, 2026 at a cost not to exceed $3,207,000. Servio Consulting, LLC will provide implementation and integration services for the period starting no sooner than January 15, 2021 through January 14, 2026 at a cost not to exceed $575,000.

VENDORS: TargetX.com, LLC   Servio Consulting, LLC
                       1001 E. Hector Street, Suite 110   14 Hickory Street
                       Conshohocken, PA 19428   Frankfort, IL 60423

USERS: District Wide

TERM:

The term of these agreements shall begin no sooner than January 15, 2021 and shall end on January 14, 2026 with options to extend for two (2) additional three-year periods.

SCOPE OF SERVICES:

The scope includes licenses, subscriptions, and implementation services for a Constituent Relationship Management (CRM) platform that integrates with CCC's other systems of record.

BENEFIT TO CITY COLLEGES OF CHICAGO:

A Constituent Relationship Management (CRM) solution which will allow us to provide exemplary student experience, operate with efficiency, and gain a comprehensive understanding of our recruitment and retention efforts. A successful implementation will give us the ability to:

- Develop an in-bound, data-driven marketing approach for recruiting new students with the ability to analyze the effectiveness of advertising and outreach.
- Improve the application and onboarding process for new and returning students.
- Make relevant information stored across multiple student-facing systems available to staff through a "single pane of glass" to provide an optimal experience to current students.
- Communicate with prospective and current students with the ability to tailor interactions/correspondence and data collected based on defined attributes or criteria, including the ability to manage events and target services to individual students.
- Facilitate student success, both at CCC and in our students' successful transition to next phase of their educational, career, or life journey.
- Nurture our relationship with alumni to increase the number of CCC champions and donors.
- Provide improved access to data to all stakeholders, resulting in more effective decision making.
- Review, evaluate, and transform current business and operational practices when appropriate.
- Develop a streamlined, integrated system architecture, additionally eliminating the need for redundant and/or "shadow systems", and decreasing the manually intensive nature of current processes.

VENDOR SELECTION CRITERIA:

Specifications were prepared by District Procurement staff and Request for Proposals (RFP) #MWJ2020-06 were publicly advertised on August 26, 2020. The RFP was sent to six (6) companies. Four (4) companies attended the Zoom pre-submittal conference on September 2, 2020. Four (4) companies responded on September 30, 2020: 1) Anthology, Inc.; 2) Hero Digital; 3) TargetX.com, LLC and Servio Consulting, LLC; and, 4) ACL Digital. ACL Digital was deemed as non-responsive for not submitting in accordance with the submittal requirements.

All proposals were reviewed, evaluated and ranked by staff which included the Offices of Information Technology, Marketing and Communications, Institutional Advancement, Academic and Student Affairs, and staff from each of the seven City Colleges of Chicago.

The proposals were evaluated based on the following criteria:

1. Implementation and approach, specifically:
   a. Company's ability to support and execute this project, in terms of resources, experience, and vision.
   b. Evidence that company is forward thinking and aware of current and future trends in technology, marketing, analytics, and customer engagement.
2. Functional Requirements, including evidence that the company understands CCC's issues and requirements and has provided a solution, including possible third party tools, and an integration strategy which will meet our needs.
3. Technical Requirements

4. Portfolio of Past Work
5. Cost

All proposals were reviewed and evaluated. The committee short-listed two of the highly scored companies, TargetX/Servio Consulting and Anthology, and invited them for oral presentations and demonstrations. The evaluation committee individually scored each presentation/demonstration based on the following criteria:

1. Mock discovery conversation
2. Demonstration Scenarios
3. Technical Questions and Answers

The evaluation committee recommends TargetX-Salesforce with implementation services by Servio Consulting and integration services by GNC Integration. Servio Consulting will leverage their more than 25 years of functional and technical expertise to ensure that the Salesforce platform is correctly configured and to ensure that CCC's core systems are integrated within our overall solution. Salesforce is a best in class CRM platform. The TargetX application sits on top of Salesforce, preconfigured and tailored to the needs of higher education. More than 400 colleges and universities use TargetX. In addition, TargetX has been implemented at many large multi-location college systems, including 50 schools who use PeopleSoft as their student information system. The solution provided the advanced marketing features specified in CCC's RFP. During the oral presentations the representatives from the respective vendors (Servio, TargetX, and Salesforce) demonstrated that they had the ability to support CCC through this critical strategic implementation using a phased approach that would allow CCC to address our most urgent needs as an institution.

MBE/WBE COMPLIANCE:
Target X and Servio have partnered to provide the CRM solution. Target X, which will provide the Salesforce licenses, partners with Servio to provide the implementation. When analyzing the CRM solution in its entirety, the level of MBE participation is 25% and the WBE participation is 17%. Procurement Services recommends waiver of the Board Approved Participation Plan for Target X.

Vendor	MBE or WBE	%	Participation	Certifying Agency
Servio 14 Hickory Street Frankfort, IL 60423	WBE	17%	Direct	Cook County
GNC Consulting 21195 South La Grange Road Frankfort, IL 60423	MBE	25%	Direct	Cook County

GENERAL CONDITIONS:

Inspector General- It shall be the duty of each party to the agreement to cooperate with the Inspector General for City Colleges of Chicago in any investigation conducted pursuant to the Inspector General's authority under Article 2, Section 2.7.4(b) of the Board Bylaws.

Ethics – It shall be the duty of each party to the agreement to comply with the applicable provisions of the Board's Ethics Policy adopted January 7, 1993, and as amended by the Board.

Contingent Liability – Pursuant to Section 7-14 of the Illinois Public Community College Act, all agreements authorized herein shall contain a clause that any expenditure beyond the current fiscal year is subject to appropriation in the subsequent fiscal year.

FINANCIAL
Total: $3,782,000
Charge to: Office of Information Technology
Sources of Funds: Capital Fund, Education Fund
FY21:   530000-00003-0023003-80000
         53/540000-92015-0023003-80000

Respectfully submitted,

Juan Salgado
Chancellor

December 10, 2020 – Office of Information Technology