



**REQUEST FOR INFORMATION
No. I-2022-008003-JK**

Student Experience CRM

I. SCHEDULE OF EVENTS

SCHEDULE OF EVENTS:

Issue Date.....February 11, 2022

Due Date and Time.....February 25, 2022 (5:00 pm, PT)

II. ISSUING OFFICE AND CONTACT

ISSUING OFFICE:

The Procurement, Contracts and Materials Management (PCMM) department of Oregon State University (OSU) is the issuing office and is the sole point of contact for this Request for Information. All concerns or questions pertaining to this Request for Information should be appropriately addressed to the individual identified below:

CONTACT PERSON:

Name: Jennifer Koehne
Title: Procurement Contracts Officer

Telephone: (541) 737-7353
E-Mail: jennifer.koehne@oregonstate.edu
Address: Oregon State University
Procurement and Contract Services
644 SW 13th Avenue
Corvallis, Oregon 97333

III. INTRODUCTION

INTRODUCTION:

This is a Request for Information (RFI), issued by Oregon State University (OSU) Procurement, Contracts and Material Management (PCMM). The purpose of this RFI is to solicit input from potential suppliers for information pertaining to a student experience customer relationship management (CRM) solution.

The student experience CRM will serve the OSU community where they are, how they prefer to be contacted, and when they need access to information, tools, resources, and training — all through a single, secure, and consistent experience.

OSU's goal is for a one-stop information solution - Students will have access to a personalized interface where they can access information and act across academics, advising, financial aid and more. Automation will free employee time currently spent on routine business processes. A student experience CRM will also provide insight into communications and interactions with students that will improve OSU's ability to serve our students.

OREGON STATE UNIVERSITY:

Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. Oregon State is one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. Oregon State is also the only Oregon institution to have earned both Carnegie Foundation classifications for Highest Research Activity and Community Engagement, a recognition of the depth and quality of its graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, Oregon State has a presence in all of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. Oregon State offers undergraduate, master's and doctoral degrees through 11 academic colleges, the Honors College, Graduate School and online Ecampus, enrolling more than 31,000 students from every county in Oregon, every state in the country and more than 110 nations.

IV. REQUIREMENTS

SCOPE AND TECHNICAL ENVIRONMENT:

The CRM system will be used for students from matriculation through graduation. It will not be used for student recruitment, alumni, external constituents, or non-credit/corporate training students.

OSU's current environment features the following key technologies

- Microsoft environment - email / calendaring / Teams
- Ellucian Banner
- Ellucian Degree Works
- Instructure Canvas
- Slate for recruiting and admissions
- ITSM Platform (currently in RFP process)
- Heliocampus
- Tableau
- Qualtrics
- Localist
- Leepfrog CourseLeaf
- Handshake

The solution should include:

- Self-Service online portal and mobile applications that allow the students access to data and information related to their status
- Dashboard experience for students as a one-stop experience for interacting with university functions
- Events Management
- 2-way SMS/Text communication; support for mass SMS messaging
- Full mobile app experience, including push notifications

- Advising support
- Appointment scheduling
- Case management
- Knowledge management
- Chatbots, and potentially other chat support
- Email automation and journeys, including transactional email and robust subscription center
- Reporting and analytics
- Workflows and process automation

IV. SUBMITTALS

Respondents are requested to submit the following information:

- Overview of a proposed solution and high-level implementation plan. Include any suggestions for features or technologies commonly used by large higher education institutions for student experience, even if they are not explicitly listed in this RFI.
- An order of magnitude estimates for initial platform purchase, 5-year recurring platform costs, and implementation costs.
- For technologies recommended, provide company and feature set overview.
- For implementers, provide company background including information regarding your experience in implementing solutions specifically in this higher education space, include other services you provide, including but not limited to organizational change management, etc.
- Provide a list of other large higher education institutions who are utilizing your platforms or services for this type of student success.
- List of any consortia, government contracts, or other procurement vehicles that Oregon State University can access.
- If a platform provider, provide a list of potential implementation partners that are familiar with your system, and have experience in higher education. Indicate how your business model works with your implementation partners (i.e., does your solution have to be bought and implemented through an implementation partner or can a client work directly with the platform provider.

Submit one (1) electronic copy of your response via email to: —

Name: Jennifer Koehne
 Title: Procurement Contracts Officer
 E-Mail: jennifer.koehne@oregonstate.edu

To be considered, responses to this RFI should be received no later than the Due Date and Time indicated in the Schedule of Events.

Information gathered in this process could potentially be incorporated in an Invitation to Bid (ITB) or Request for Proposal (RFP). Any resulting RFP or ITB will be openly competitive and therefore responses should not be exclusive or restrict competition. This RFI does not obligate OSU to issue an RFP or ITB nor to include information submitted by respondents.

A contract will not be issued directly from this RFI, nor will issuance or acceptance of submittals or subsequent conversations bind OSU into any type of contractual obligation or relationship.