Recommendation to Approve Contract with TargetX & Salesforce

Recommendation:

Staff recommends approval of a five-year term for purchasing TargetX and Salesforce software totaling $412,173.57. The first 12-month term will be paid in the current fiscal year (FY21-22) by using FIPSE grant money ($72,000) and contingency funds ($34,509.31) for a total of $106,509.31. The remaining four, 12-month terms will be budgeted each fiscal year to cover the remaining total of $305,664.26.

Summary:

Over the past year, the College has been utilizing a Customer Relations Management (CRM) system (HubSpot) to improve the College's goal of improving tracking and communication with potential students and student services. In 2021, the College also received a *Fund for the Improvement of Postsecondary Education (FIPSE)* grant that would contribute funds toward an SRM system used by NPC's Early College Programs. The combination of these factors led the College to put out an RFP to obtain bids for an CRM system in December 2021 to meet the competitive procurement process.

The recommended vendor, TargetX, offers software designed specifically for higher education that improves and facilitates the pre-enrollment student tracking process. Their software is built on top of Salesforce software which provides general customer relations management software and does not require a custom build. In addition, the TargetX bid also includes software that focuses on improving current student retention, which none of the other vendors' proposals offered. This added piece of software will bring several student tracking processes and systems together under one piece of software and aid in the college's efforts to implement its Guided Pathways initiative.

The selection of the winning bidder was made through a procurement software process that awarded points to each bid based on predefined criteria and information provided in the vendor's submission. From those initial scores, the top three vendors with the highest scores made product demonstrations to the committee, which then scored the vendor presentations. The vendor with the highest total score was then recommended by the committee.

Northland Pioneer College

Post Office Box 610 • Holbrook, AZ 86025 • (928) 524-7311 • Fax (928) 524-7312 • www.npc.edu

TARGETX ORDER FORM

General Information

Customer Name:	Northland Pioneer College
Department/Division:	Recruiting, Admissions, and Retention
Subscription Dates:	01/18/2022 - 01/17/2027

TargetX 5-Year Total Investment

Total Investment	Term 1	Term 2	Term 3	Term 4	Term 5
TargetX Community College Suite Includes:	$ 57,255	$ 57,255	$ 57,255	$ 57,255	$ 57,255
- Recruitment Suite					
- Retention Suite					
- Insights Reporting and Analytics					
TargetX Implementation Services	$ 27,500	X	X	X	X
- One-time, comprehensive fee					
- No hourly charges					
- No third party needed					
Total by Term	**$ 84,755**	**$ 57,255**	**$ 57,255**	**$ 57,255**	**$ 57,255**

Third-Party Product Licenses

Product Name	# of Licenses
Informatica Cloud	1 Production Org/User Agent

TargetX Invoicing Schedule

The initial term of this agreement shall be for five (5) years commencing on January 18, 2022 and expiring on January 17, 2027 unless sooner terminated as outlined in the Master Service Agreement.

TargetX Payment Terms

Offer expires 01/18/2022 if signed Order Form and Master Services Agreement (MSA) are not received. Once invoiced, due net 30 Days.

Notes

In the event of any conflict between this Order Form and the Master Service Agreement, or any Proposal or the TargetX Description of Services, this Order Form shall prevail.

Institutions are required to contract directly with Salesforce to obtain Salesforce licenses to utilize the TargetX CRM. TargetX requires one of the user licenses to maintain administrative control over the application. Details and descriptions of the products and services listed above are provided in the proposal and the TargetX Description of Services. All professional services, including implementation services and Premier Support, if listed above, are only valid during the subscription term described above. Pricing for licenses of Third Party Products is subject to

Client will reimburse TargetX for expenses reasonably incurred in the performance of the services described above, including travel, lodging, etc. etc.,provided that the cost for such expenses is documented in the applicable Order Form or Statement of Work. TargetX agrees that any such reimbursement may be limited by Client'sstandard travel reimbursement policies and TargetX's submission of supporting documentation in accordance with State of Georgia travel regulations.

TargetX Description of Services https://www.targetx.com/description-of-services/

Agreement Signatures

This Sales Order Form is subject to the Master Service Agreement, and the Proposal/Statement of Work referenced above.

CUSTOMER

Signature:

Name:

salesforce.com, inc.
Salesforce Tower
415 Mission Street, 3rd Floor
San Francisco, CA 94105
United States

ORDER FORM

Address Information

Bill To:
PO Box 610
Holbrook
AZ, 86025
US - United States

Ship To:
PO Box 610
Holbrook
AZ, 86025
US - United States

Billing Company Name: Northland Pioneer College
Billing Contact Name: Robert Johnson
Billing Email Address: robert.johnson@npc.edu

Billing Phone: 1 928 532 6111
Billing Fax: 9285247419
Billing Language: English

Terms and Conditions

Contract Start Date*: 1/5/2022
Contract End Date*: 1/4/2027
Billing Frequency: Annual

Payment Method: Check
Payment Terms: Net 30
Billing Method: Email

Services

Services	Order Start Date*	Order End Date*	Order Term (months)*	Monthly/ Unit Price**	Quantity	Total Price
Service Cloud - Unlimited Edition	1/5/2022	1/4/2027	60	USD 72.00	10	USD 43,200.00
Courtesy Administrators for Admin Assist - Unlimited Edition	1/5/2022	1/4/2027	60	USD 0.00	1	USD 0.00
Customer Community - Unlimited Edition - Logins (Per Month)	1/5/2022	1/4/2027	60	USD 0.50	416	USD 12,480.00
Lightning Platform Starter - Unlimited Edition	1/5/2022	1/4/2027	60	USD 6.00	20	USD 7,200.00
						Total: USD 62,880.00

Cost Breakdown By Year

Year	TargetX	Salesforce License	Subtotal	9.43% Sales Tax	Total Cost	
1	$84,755.00 (includes one time set-up of $27,500)	$12,576.00	$97,331.00	$9,178.31	$106,509.31	
2	$57,255.00	$12,576.00	$69,831.00	$6,585.06	$76,416.06	
3	$57,255.00	$12,576.00	$69,831.00	$6,585.06	$76,416.06	
4	$57,255.00	$12,576.00	$69,831.00	$6,585.06	$76,416.06	
5	$57,255.00	$12,576.00	$69,831.00	$6,585.06	$76,416.06	
	$313,775.00	$62,880.00	$376,655.00	$35,518.57	$412,173.57	**5 Year Total Cost**

* Year = 12 month span, not calendar or fiscal

AS#22-01 - Customer Relations Management (CRM) software
Scoring Summary

Active Submissions

Supplier	Total	A - Proposal Cost	A-1 - BT-470Y	A-2 - Annual Cost>1st year	A-3 - Total Cost	C - Customer Relations Management (CRM) software (Q-79NT)	C-1 - CRM Software	D - Main Evaluation	D-1 - Value-Added Services/Software	D-2 - Experience with working with higher education institutions	E - References	E-1 - Reference 1	E-2 - Reference 2	E-3 - Reference 3	F - Demonstration	F-1 - Meets Requirements	F-2 - Ease of Use
	/ 280 pts	/ 70 pts	/ 10 pts	/ 10 pts	/ 50 pts	/ 80 pts	/ 80 pts	/ 15 pts	/ 10 pts	/ 5 pts	/ 15 pts	/ 5 pts	/ 5 pts	/ 5 pts	/ 100 pts	/ 50 pts	/ 50 pts
TargetX	196.71	14.13	2.81 ($97,335.00)	1.632 ($69,835.20)	9.683 ($376,676.01)	59.98	59.98	13.6	8.8	4.8	15	5	5	5	94	47	47
LeadMaster	173.98	70	10 ($27,350.00)	10 ($11,400.00)	50 ($72,950.00)	60.98	60.98	8	5.6	2.4	0	0	0	0	35	16	19
Enrollment Rx	168.62	15.51	2.321 ($117,840.00)	2.145 ($53,140.00)	11.04 ($330,400.00)	55.61	55.61	13.5	8.6	4.9	15	5	5	5	69	32	37

Eliminated Submissions

Supplier	A - Proposal Cost	A-1 - BT-470Y	A-2 - Annual Cost>1st year	A-3 - Total Cost	C - Customer Relations Management (CRM) software (Q-79NT)	C-1 - CRM Software	D - Main Evaluation	D-1 - Value-Added Services/Software	D-2 - Experience with working with higher education institutions	E - References	E-1 - Reference 1	E-2 - Reference 2	E-3 - Reference 3	F - Demonstration	F-1 - Meets Requirements	F-2 - Ease of Use
	/ 70 pts	/ 10 pts	/ 10 pts	/ 50 pts	/ 80 pts	/ 80 pts	/ 15 pts	/ 10 pts	/ 5 pts	/ 15 pts	/ 5 pts	/ 5 pts	/ 5 pts	/ 100 pts	/ 50 pts	/ 50 pts
FreeAgent CRM	70	10 ($19,800.00)	10 ($19,800.00)	50 ($99,000.00)	52.8	52.8	3.15	2.75	0.4	0	0	0	0	-	-	-
Anthology Inc.	22.21	3.173 ($62,406.00)	3.173 ($62,406.00)	15.86 ($312,030.00)	55.06	55.06	9.6	5.5	4.1	15	5	5	5	-	-	-
Dominic Systems Limited	21.07	1.473 ($134,407.00)	4.222 ($46,902.00)	15.37 ($322,015.00)	38.19	38.19	2.3	1	1.3	12	4	4	4	-	-	-

Vendor	Date Received	Time Received	Bid Submission Received By	Bid Submitted
FreeAgent CRM	11/23/21	10:35 AM	Electronic - Bonfire	First Year 20 User Base Cost: $19,800 Annual Cost after Implementation: $19,800 5-Year Total Cost: $99,000
Anthology Inc	12/01/21	10:24 AM	Electronic - Bonfire	First Year 20 User Base Cost: $62,406 Annual Cost after Implementation: $62,406 5-Year Total Cost: $312,030
Dominic Systems Limited	12/01/21	01:58 PM	Electronic - Bonfire	First Year 20 User Base Cost: $134,407 Annual Cost after Implementation: $46,902 5-Year Total Cost: 322,015
Enrollment Rx	12/01/21	01:13 PM	Electronic - Bonfire	First Year 20 User Base Cost: $117,840 Annual Cost after Implementation: $53,140 5-Year Total Cost: $330,400
LeadMaster	11/30/21	10:02 AM	Electronic - Bonfire	First Year 20 User Base Cost: $27,350 Annual Cost after Implementation: $11,400 5-Year Total Cost: $72,950
TargetX	11/30/21	03:35 PM	Electronic - Bonfire	First Year 20 User Base Cost: $97,335 Annual Cost after Implementation: $69,835.20 5-Year Total Cost: $376,676.01

WE HEREBY CERTIFY THIS IS A TRUE AND ACCURATE TABULATION OF THE PROPOSALS RECEIVED FOR THE ABOVE REFERENCED REQUEST FOR PROPOSALS ON December 01, 2021.

Request for Proposals Due on December 01, 2021 at 3:00 P.M., Arizona time. Request for Proposals Received by: Robert Johnson (Bonfire E-Procurement System). Bid Opening Attendees: Robert Johnson, Terrie Shevat, Ann Hess, Ashley Crocker.
Navajo County Community College District dba Northland Pioneer College
RECORDED BY: Terrie Shevat