

Date of Board Meeting:

October 20, 2026

Recommendation:

Approval to seek proposals for a Customer Relationship Management (CRM) System

Background and Rationale:

Wharton County Junior College has submitted a proposal to the Houston Endowment for an implementation grant that includes funding to procure a customer relationship management (CRM) system. A CRM would give the College a coordinated way to communicate with prospective and enrolled students, track their progress from inquiry through graduation, and connect them with timely support. It would strengthen the APP2CAP student success framework by helping recruitment, admissions, financial aid, and advising staff deliver clear, consistent information at each step of a student's journey.

The CRM would allow WCJC to send timely, targeted reminders about applications, financial aid, registration, advising, and key academic milestones. It would also help staff identify students who have missed a step or may need assistance and follow up before that issue interrupts enrollment. These more intentional contacts are expected to improve students' ability to stay on their pathways, persist from term to term, and graduate. Board approval is requested to initiate a Request for Proposals so the College can evaluate CRM solutions based on defined criteria and the College's operational requirements upon notification of grant awarding. Any resulting contract would be brought forward through the applicable approval process.

Budgetary Implications:

\$300,000 (Year 1)
\$100,000 (Year 2)
\$100,000 (Year 3)
(Contingent upon awarding of Houston Endowment Implementation Grant)

Resource Personnel:

David Byrd, Vice President of Access, Completion, and Technology
Clarissa Bueno, Director of Purchasing
Robby Mathews, Director of Networking and Server Services
Tessa Mathews, Sr. Director of Enterprise Systems
Etc.

Approval:
Cabinet-Level Member
President