



Request for Proposals for:

Financial Aid Consulting Services

RFP Issue Date: September 16, 2022

Response **Due Date:** October 3, 2022 by 5 PM

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Invitation

REQUEST FOR PROPOSALS

Northwest State Community College (NSCC) is extending an invitation for proposals from qualified firms, with the specific expertise of using the Banner Student Information System (SIS), to provide financial aid consulting services, specifically in the forms of analysis and improvement of the overall financial aid process, developing and broadening the financial aid process as an enrollment management strategy, and technical expertise related to the Banner Student Information System to increase automation and efficiency.

NOTICE!

In order to receive any addenda or supplemental information, you **MUST** register with the Executive Office of NSCC, either by mail at 22600 State Route 34, Archbold, OH 43502; by telephone at 419-267-1349; or by email to tsullivan@northweststate.edu.

The following information is required:

- Name of Organization
- Contact Name
- Street Address
- City, State Zip
- Telephone
- Fax Phone (optional)
- Email address

Background Information

NSCC is extending an invitation for proposals from qualified firms, with the specific expertise of using the Banner Student Information System (SIS), to provide financial aid consulting services, specifically in the forms of analysis and improvement of the overall financial aid process, developing and broadening the financial aid process as an enrollment management strategy, and technical expertise related to the Banner Student Information System to increase automation and efficiency.

Overview

The overarching goal of the financial aid consulting services is to provide continued support to the NSCC Financial Aid Department during a time of transition, following various departures from the department. Another primary goal of the consulting services is to identify methods to improve the efficiency of the financial aid process and streamline the learner experience from application to qualification to award packaging and completion, while maintaining state and federal compliance. Working in close collaboration with NSCC's Vice President of Enrollment Management & Student Affairs and Financial Aid Director, the chosen consultant will provide expertise and develop strategies to streamline the financial aid experience for learners, by consolidating or eliminating steps where appropriate and possible. Furthermore, the consultant will provide recommendations for implementation of the modified methods and train personnel, as well as assist in application of the same.

Scope of Work

The consultant awarded this contract shall perform the tasks and sub-tasks listed below:

Task 1: Develop Strategy and Framework for Services

Task 2: Conduct Start-Up Meetings: Start-up meetings will be conducted between the approved applicant and NSCC's Vice President of Enrollment Management & Student Affairs and Financial Aid Director to discuss the needs, expectations, and progress of the project.

Task 3: Holistic Analysis of the Financial Aid Process: The chosen consultant will review the financial aid process, identifying areas for improvement. More specifically, the consultant will provide recommendations for developing the process as an enrollment management strategy, including proposing software-driven strategies to implement and manage new scholarships and utilize Banner to automatically identify and evaluate scholarship eligibility against established criteria and issue awards.

Task 4: Identify Banner-Driven Methods to Improve Financial Aid Efficiencies

Task 5: Provide Technical Expertise and Training Relating to Banner: The consultant will provide Banner Software training to allow for more effective use of the program in the financial aid process.

Task 6: Draft Report of Findings: The selected applicant will draft a report outlining findings and highlighting recommendations for improvement, which they will review with the Financial Aid Management Team.

Task 7: Implementation Plan: The selected applicant will assist the Financial Aid Management Team in implementing the recommended methods for improving the efficiency of the financial aid process and learner experience and will design an assessment plan that evaluates the outcomes from the proposed efficiencies.

Deliverables and Milestones

Release of Request for Proposal – Friday, September 16, 2022

Applicants' questions - to be received by Wednesday, September 28, 2022 at 12 PM

NSCC's responses to questions – to be issued by Thursday, September 29, 2022 at 5 PM

Proposals Due – Monday, October 3, 2022 by 5 PM

Submittal Requirements

(1) Inquiries and Information Requests Prior to Submission:

Northwest State Community College's Executive Office will act as the clearinghouse for all inquiries and information requests.

All inquiries and information requests must be submitted electronically to Treasure Sullivan, Administrative Assistant: tsullivan@northweststate.edu.

The answers to all inquiries will be provided to all registered parties by the Executive Office. All answers will be electronically distributed to all those registered as being in receipt of the RFP documents. Addendums will also be posted on the Northwest State Community College website with the original Proposal document. Any other responses to questions not via the Executive Office are considered casual and not binding.

(2) Proposal Instructions:

Each bid should be completed entirely, should not exceed 10 pages, and be typed in 12-point font, single spaced, 1" margins on all sides. Bids should include page numbers and table of contents. The cover page, table of contents, and attachments will not count against the 10-page limit.

Proposals will clearly and concisely define the processes, skills, and tools to be used toward project requirements. Proposals will include project plans with specific milestone dates, action items, outcomes measurements and costs of the project while demonstrating:

- Clear understanding of the Financial Aid Consulting Services scope of work, outcomes, and timelines.
- Plans for carrying out the work, including staffing, major milestones, and timelines.
- Explanation of budget - Budget description may include tiered pricing options, if necessary.

Please have your proposal organized in the following manner for each component:

- Attachment A: Cover Page
- Attachment B: Conflict of Interest Form
- Attachment C: Budget Form & Narrative
- Organizational Chart
- Proposal (scope of work)

(3) Complete Submittals: Respondents shall electronically submit their proposal containing all the requested information to the Northwest State Community College Executive Office: Treasure Sullivan at tsullivan@northweststate.edu by October 3, 2022 by 5:00 PM, Local Time.

- a) Late responses may be deemed unresponsive. At its sole discretion, Northwest State Community College reserves the right to reject any proposal not deemed satisfactory and to waive any and all irregularities in the procedure. Omission, inaccuracy, or misstatement may be sufficient cause for a proposal to be deemed unresponsive and/or irresponsible.
- b) There will be NO public opening; submittals may be viewed by appointment with Northwest State Community College.

The Selection Process

(1) Evaluation of Proposals

Scoring by the evaluation committee will be via the Evaluation form included in the Appendix.

(2) Evaluation/Selection Committee

Name/Title	Institution	Contact Information
Lana Snider, Vice President of Enrollment Management & Student Affairs	Northwest State Community College	lsnider@northweststate.edu
Ashlynn Cox, Director of Financial Aid	Northwest State Community College	acox@northweststate.edu
Jennifer Thome, Chief Fiscal and Administrative Officer	Northwest State Community College	jthome@northweststate.edu

Disclaimers and Disclosures

Disclaimers

In its sole discretion, Northwest State Community College may withdraw the RFP either before or after receiving submissions, may accept or reject submissions, and may accept submissions which deviate from the RFP as it deems appropriate and in Northwest State Community College's best interest. In its sole discretion, Northwest State Community College may determine the qualifications and acceptability of any party or parties submitting in response to this RFP.

Following submission of an RFP, the respondent agrees to deliver such further details, information and assurances, including financial and disclosure data, relating to the response and/or the respondent, including the respondent's affiliates, officers, directors, shareholders, partners and employees, as requested by Northwest State Community College in its discretion.

Northwest State Community College and its advisors shall have no obligation or liability with respect to this RFP, the selection and award process contemplated hereunder, or whether any award or recommendation will be made. All costs incurred by a respondent in preparing and responding to this RFP are the sole responsibility of the respondent. Any recipient of this RFP who responds hereto, fully acknowledges all the provisions of this disclosure and disclaimer and agrees to be bound by the terms hereof. Any response submitted pursuant to this RFP is at the sole risk and responsibility of the party submitting such response.

Respondents are advised that participation in the design of evaluation strategies might result in exclusion or restriction from participation in other phases.

Disclosures

Northwest State Community College is governed by the Ohio "Open Records Law" and all responses and supporting data shall be subject to disclosure as required by the law.

Selected applicant, in accepting a Purchase Order or entering into an agreement with Northwest State Community College, agrees to fulfill the entire scope of work requested.

Appendix

Evaluation Matrix

Organizational qualifications and experience

Possible

General Qualifications	10
Respondent's Banner SIS Background and Experience	35
Quality and Depth of Proposed Solutions	30

Work plan and timeline

Clear understanding of scope of work, outcomes, and timelines	5
Plan to accomplish the scope of work	10

Cost

Budget submitted with this RFP is reasonable	10
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Total	100
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Attachment A: Cover Sheet

Please complete this **mandatory** cover sheet accordingly.

Organization Name				
Address				
Phone Number				
Number of Years in Business				
DUNS #				
Acknowledgement that Proposing Entity is up-to-date on taxes and not currently debarred or suspended.		YES		NO
Type of Organization (check all that apply)	<input type="checkbox"/>	Higher Education	<input type="checkbox"/>	Private
	<input type="checkbox"/>	Community-Based Organization	<input type="checkbox"/>	Business Organization
	<input type="checkbox"/>	Government Agency	<input type="checkbox"/>	Other (Explain)
	<input type="checkbox"/>	Labor Organization		
	<input type="checkbox"/>	Non-Profit		
	<input type="checkbox"/>	Employment Service State Agency (Wagner-Peyser)		
Contact Person's Email Address				
Signatory Authority Signature				

Attachment B: Conflict of Interest Form

By submitting a proposal, the authorized signatory authority of the bidding entity certifies to his/her knowledge and belief that there is no conflict of interest (real or apparent) inherent in the bid or in delivering the scope of work if Northwest State Community College awards a contract. A conflict of interest would arise if any individual involved in the preparation of this proposal and delivery of services has a financial or other interest or would be likely to gain financially or personally from the award of a contract. The same would hold true for any member of the individual’s family, partner, or an organization employing or about to employ any of the above as a direct result of the successful award of a contract under the RFP. Northwest State Community College reserves the right to disqualify a bidding entity should a conflict of interest be discovered during the solicitation process.

Signatory Authority Name and Title	Signature	Date
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*Note: This form is a **mandatory** required document to be considered for either component. Bidders should only complete this form once per entry.*

Attachment C: Budget

Please complete the **mandatory** budget form and narrative explanation below. In creating a budget, the applicant should provide per unit costs by completing the following table and providing a justification for costs in a budget narrative.

Budget Line Item	Cost
Salaries	\$
Benefits	\$
Travel	\$
Operational (supplies, communications, etc.)	\$
TOTAL	\$

Budget Narrative: Please provide a detailed explanation for each budget line item to justify the cost.