

STATE BOARD OF COMMUNITY COLLEGES
Contract Amendment with Ellucian for Financial Aid Self-Service

Request: The State Board is asked to approve an amendment to the Contract for College Information System Software Maintenance with Ellucian for license, maintenance, and services required to support the implementation of the new Self-Service Financial Aid module which is a replacement for the current Financial Aid module, at a cost not to exceed \$725,017. The amendment includes a perpetual license, nine months of maintenance, consulting services, implementation services, and training.

Background: The North Carolina Community College System's CIS project, which is based on Ellucian's Colleague® System, has been in ongoing maintenance and operation since implementation of the system completed in March 2008. Ellucian, as part of a continuing effort to meet educational market needs, developed a new set of software development tools based on web technology. The Self-Service Financial Aid module is written with new web technology and is a replacement for the student on-line financial aid modules utilized by the North Carolina Community College System as part of the CIS Project.

Currently there are two components to the on-line Financial Aid modules. One is related to student Financial Aid notifications utilized at all 58 community colleges and the second is a Financial Aid Awards Acceptance module utilized at some of the colleges. The new Self-Service Financial Aid module merges these two modules into a single system to better guide students through the Financial Aid approval process which will improve student service and support.

Rationale: The amendment provides for the licensing of the Financial Aid Awards Acceptance module component currently not part of the CIS Project as well as services for the implementation and deployment of the Self-Service Financial Aid module to the 58 community colleges. The cost break down is \$640,632 for the licenses, \$3,000 for implementation support and \$81,385 for maintenance.

The benefits and justification for implementing Financial Aid Self Service include the following:

- The module can be accessible via a mobile device. This feature allows community college students to access their financial aid data anywhere anytime.
- This module allows a student to access all of their financial aid information in one seamless location. The current Financial Aid module has information spread over multiple screens and locations.
- The module gives the student an interactive checklist of things needed for the completion of a financial aid packet that will help the student to 'see' what is next on the 'to do' list - what has been submitted and what is still missing without having to contact college staff.
- The module has the ability to view Satisfactory Academic Progress (SAP). This means the student can track their SAP status to make sure they are taking the courses and making the grades necessary to continue their financial aid eligibility.
- The module allows students to receive loan counseling, accept their loan, and/or change their loan amount on-line without having to make a phone call, wait in a line or see a financial aid counselor.

- The module will reduce the necessary mail communications between Financial Aid staff and students which will free up time for Financial Aid staff to respond to higher level student questions and will result in cost savings for the colleges.
- This module will supply the student with detailed information concerning Financial Aid which will result in fewer calls to Student Services staff and allow for Financial Aid consulting with students. This module will supply students with on-demand Financial Aid information which will allow them to make decisions concerning registration which will decrease barriers to student enrollment.
- This module when implemented could save a college on average \$6,000 per year depending on size. This would result in a \$344,000 per year savings for the System.

Method of Procurement: In accordance with the procurement practice of the State of North Carolina approval is being sought by outside purchasing authorities. Approval of the contract by the State Board is contingent upon approval by the State IT Procurement Office.

Contract Amount and Time Period: The contract is not to exceed \$725,017 from date of award through June 30, 2016.

Fund Source and Availability: Funding is available from State General Fund appropriations that have been transferred to a non-reverting special funds specifically dedicated for CIS upgrades.

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