April 15, 2013

ADDENDUM No. 2

Re: 12-13/18 Implementation and Configuration of District-Wide Financial Aid Solutions

The following questions were submitted by the deadline and are answered in this addendum.

1. Has the Peralta Community College District attempted to implement PeopleSoft Financial Aid in the past? If so, what issues did the District face

   Answer: Yes. The issues the District face were in determining the home campus and separating the four campuses into their own entity, while combining enrollment within the District as a consortium. Additionally, budget strings were set up incorrectly by the vendor consultant, thereby creating incorrect data in Student Financials. Problems ensued from this process since the District is not a financial aid entity, only the four colleges are.

2. Will a Student Financial Functional lead be provided by Peralta to support the creation of required item types as well as support for testing?

   Answer: Yes. A Student Financials Functional lead will be involved in the process.

3. Can the District please clarify the statement “Generate unlimited Tracking Letters”? Would this statement be in reference to the number of BI publisher/ComGen or Letter Gen templates that will be needed or the concept that once a template is created, it can be run as many times as the District would like?

   Answer: Both. The colleges would like the function to send out correspondence to a student as many times as required, as an initial notification and reminder of what documents are needed or as information changes based on student responses and the ISIR as corrections are made or new information the Department of Education provides the District or such new Defaulters or overpayments the student may owe. The District may have multiple correspondences which will require dissemination to our students depending upon their particular status, which can be ever changing. Please refer to Question #4, for a list of those correspondences.
4. How many different correspondences does Peralta envision needing to be developed using BI Publisher/ComGen or Letter Gen?

Answer: As many as are required based on the needs of our students. For those vendors who are not familiar with BI Publisher/ComGen or Letter Gen. Below, the District has provided a list of letters that we currently use and/or would like use in the future to communicate with students:

- Welcome Letter
- Initial Satisfactory Academic Progress Letter
  a. OK
  b. Disqualified
  c. Probation
  d. Appeal Denied
  e. Appeal Approved
- Award Letter
- Pell Lifetime Eligibility
  a. 300%
  b. 450%
  c. 500%
  d. 600+% 
- Default Status
- Overpayment at another Institution
- R2T4 Notice Letter
- BOG only Award
- BOG Disqualification Letter
- Referral Letter/re: informing student of referrals to Department of Education

5. Can you please provide more clarification regarding the functionality “Sort/order ISIRs by student choice (separate into four campus locations)” and Delivered with PeopleSoft the student will only have 1 award page?

With this requirement it makes it appear as though the District would like to award aid by campus, but the award page is by institution and not by campus. Given the structure as stated in the RFP (one institution and multiple campuses), this requirement cannot be accomplished or delivered and would require modification. Can the District provide more information regarding this requirement?

Answer: The District provides for Financial Aid purposes that the colleges are all separate entities and this would cause a need for modification. If the campuses go under one District federal code, this would create a loss of funding for students and for permanent employee salaries, also.
6. What is state ISIRs? Is this related to the BOGG fee waivers?

   Answer: State ISIRs are generated through the California Student Aid Commission’s system for students classified as an AB540 student whom is eligible for certain State Aid under the California Dream Act. These students complete the CAISIR application which is similar to the Federal ISIR format and must be downloaded from the CA state’s system, WebGrants into the District system. Students who meet the qualification of an AB540 student can receive a Bog and starting in Fall 2013-14 receive Cal Grants other state aid, whereas these students do not have Social Security numbers.

7. Given the complexity of some of the District’s requirements, it is likely customizations will be necessary to use PeopleSoft Financial Aid. If the current mandated timeline does not allow for appropriate duration to complete the work, what options are available to the vendor to adjust the schedule knowing that Financial Aid Processing needs to occur starting on February 28, 2014?

   Answer: The District provides there will be no available options to the vendor.

8. Will the District provide sufficient staff to test the system or is it the assumption that the District’s Functional Lead in consultation with the vendor consultants performs all of the testing and acceptance of the system?

   Answer: The District will provide end-users to test the system along with the FA Functional Lead and Vendor consultants.

9. Does the Peralta FA Functional Lead have PeopleSoft experience?

   Answer: Yes. The District’s Functional Lead has PeopleSoft experience, but no prior experience with PeopleSoft Financial Aid modules.

10. What are the expectations regarding knowledge transfer?

    Answer: The District provides the expectations with regards to the knowledge of transfer are as follows:

    - Assistance in documenting procedures
    - Organizing a USER Manual
    - Working Directly with and Training Financial Aid Functional Lead/Users and IT as work is being completed.
    - Organize training with all Financial Aid staff.
    - Document implementation of Fit/Gap processes/steps.
11. Does the District want pricing options to provide support during the first full Financial Aid processing life cycle, once in production (e.g. first time you make awards, first time you distribute financial aid, first time you run SAP)?

    \textit{Answer: Yes. The District would like upfront pricing for support once in production.}

12. How does the District handle summer terms, as trailers or headers? Secondly, do all schools within the District handler summer terms in the same manner?

    \textit{Answer: The District herein provides that Summer is the trailer for all Federal, State, and Private financial aid with exception to the Board of Governors Fee Waiver Program which Summer is the header. All campuses handle summer in the same manner.}

13. What governance procedures are anticipated? Will the FA functional lead be a decision maker or will the Vendor always have to refer to a committee and stake holders?

    \textit{Answer: The District provides that the FA Functional Lead will not have the final approval. The District’s Director of Financial Aid and the Associate Vice Chancellor of Student Services will have the final approval.}

14. Will the “Home” campus be determined every term, academic year or only once as part of the admission process?

    \textit{Answer: The District provides the ‘Home’ campus will be determined per academic year.}

15. Will training consist of train-the-trainer, one on one? Or, will fully organized training be required for all FA staff?

    \textit{Answer: Yes. The District provides that full organized training will be required for all FA staff and end-users.}

16. ISIR processing can be controlled by federal school ID (campus code) with modifications or all ISIRs can be loaded under one institution and verification done globally. Under the second scenario the student receives fewer “To-do” requirements. Is this what the District needs? Is there one self-service To-do list controlled by the institution? Or is there one self-service To-do list for each campus?

    \textit{Answer: The District provides that ISIR processing shall be controlled by Federal ID. With regards to the “to do list” the campus may maintain control of it, but shall have one “to do list” seen by all (four campuses and the District) as an institution.}
17. Will each campus have a crack at packaging a prospective student as an incentive for the student’s enrollment before the “Home” campus is determined?

   Answer: No. The District provides that during the ISIR load process, a home campus will be determined. The student shall be assigned to his/her “home” campus for the entire academic year.

18. Will the consultants be retained after the GoLive to support packaging, loan and Pell processing, and disbursing?

   Answer: Yes. The District prefers to retain the consultants until all functions are up and running smoothly.

   There are no other changes to the RFP.