Addendum 1 dated 4/02/2020
to BC 21182 VHR
Financial Aid Optimization Consulting Services

As a result of questions received from Potential Proposers regarding Solicitation BC 21182 VHR Financial Aid Optimization Consulting Services, the following amends/clarifies the above referenced solicitation documents:

1. For item 1.3.2, 4. – Based on the current Scope of Services, is the campus looking for a tool/deliverable to use on their own?

   **Response:** If the option exists to have full access/ownership of the model, we'd certainly be interested in exploring that option, however, having access to ongoing consultation is still desired.

2. Our approach is different than those set forth in the RFP. Would UMBC consider alternative approaches?

   **Response:** UMBC will consider alternative approaches. However, Proposers must clearly state in their Technical Proposal which criteria/specification in the Solicitation their alternative solution/approach replaces and/or revises.

3. What admission solution does UMBC use?

   **Response:** Undergraduate Admissions uses Oracle Campus Solutions (PeopleSoft) and CommonApp as their admissions solution. The Graduate School uses both PeopleSoft and CollegeNet.

4. What financial aid management solution does UMBC use?

   **Response:** Financial Aid uses Oracle Campus Solutions (PeopleSoft) as their financial aid management solution.

5. Does UMBC prefer to allow the transfer of admission and financial aid data through an API/Webhook, or is there a current admission and financial aid data extract that is generated consistently?

   **Response:** UMBC can support either approach, though UMBC’s preference would be to use an existing (or create a new) extract as needed from our Data Warehouse.

6. Are there any technical specifics that can be shared with us regarding the use of a virtual private network (VPN), secure file transfer protocols (SFTP), shared directories, or guidelines/limitations as to the transfer of enrollment data?

   **Response:** The Department of Information Technology (DOIT) supports SFTP, but their preferred method is REST API.
7. Section 1.3.3 indicates that UMBC would prefer a non-static dashboard. Could a proposer provide real-time dashboards for admission and financial aid, as well as customized dashboards based on the client's need. Would there be required dashboards for the SEM team, or will the dashboards be up to the firm to determine what is needed.

Response: The SEM team requires customized non-static dashboards, based upon the specific needs of each team member. The firm should make recommendations for the data to be displayed on each area's dashboard; but allow for team members to include data elements tailored to UMBC's specific circumstances and/or environment.

8. We noticed several areas that require an 11-point font. Can UMBC please confirm this is a requirement only for those sections?

Response: 11 pt. font size is the minimum size for the entire technical proposal. A larger font size is preferred for ease of readability by evaluation committee members.

9. Has UMBC identified a budget for this initiative, and if so, is it possible to share? Is there a price above which proposals would not be accepted?

Response: UMBC will not provide its budget. Per the Solicitation, this is a phased procurement. Only Technical Proposals are required at this time. Pricing will only be requested of the shortlisted proposers following the technical evaluation. Refer to Section III of the Solicitation Documents for information regarding the procurement phases.

10. Section 1.3.4 of the RFP provides a timeline for the project, completing the analysis and FAOP deliverable in October of 2020. However, most institutions require updated awarding structures much earlier in the cycle (i.e., late-July/early-August) so that recruiters are providing potential students with accurate awarding information. Is there flexibility in the expected timeline to meet that expected need?

Response: Having an awarding structure in hand by late/July early August would be ideal, but for the first year, given the timeline for completing the process for this RFP, UMBC would consider October 1 acceptable. After the first year, we would want to receive the awarding policy in the late July/early August timeline.

11. a. In reviewing UMBC’s OIR reporting, there is significant transfer enrollment. Can you confirm that proposals should incorporate both freshmen and transfer awarding?

Response: Yes, the primary focus is first-time freshmen but we'd be interested in awarding strategies for transfers as well.

b: Are there any other significant population segments that should be taken into account in proposal development?

Response: Out of state students, International students, women, and arts and humanities.
12. Section 1.3.2 mentions retention and student success as a desired goal of this engagement. Does UMBC anticipate this engagement including awarding analysis and consulting for returning students as well as entering students, or are these retention impacts expected to be realized as Fall 2021 cohort progresses?

Response: We are interested in awarding strategies for first time/entering students (freshmen and transfers) that consider and support our retention goals. We are not seeking awarding strategies for continuing students.

13. For item 2.2.3, c. (page 11) – For the “resource-loaded timeline of tasks,” are we required to use the provided Appendix B Final Sample Resource Loaded Project Timeline Excel document in its current format or can we re-create our own resource loaded timeline chart as long as it includes the information requested on the sample? Also, in relation to this chart, are we to add/include our own process tasks in Column A or do you want resource loaded information for only the two tasks shown on Appendix B – Initiation Meeting and Researching Peer Institutions?

Response: The form contained in Appendix B was a sample only. Proposers may re-create their own resource loaded timeline chart as long as it includes the information request on this sample. Proposers are to include all of their process tasks in Column A; again the two tasks that were listed were simply sample tasks and were not to be construed as the only tasks to be included in the chart.

14. Will this engagement allow testing of different top-line pricing scenarios for UMBC in our search for the best top-line and net-cost combination?

Response: UMBC is open to consider this. Proposers should address their recommendations/proposed testing of different strategies/scenarios within their technical proposals when responding to Section II, 2.2.3 a “Describe your firm’s proposed methodologies and processes to achieve the required scope of work...... “

15. Is there a data systems/institutional research professional represented on the list of UMBC’s project participants?

Response: Enrollment Management works very closely with the Office of Institutional Research and Decision Support and the Deputy CIO/Associate Provost for Analytics and Institutional Assessment.

16. Is this project focused on traditional undergraduate students? If not, which additional prospective student cohorts are of interest?

Response: See Question #11 a and 11 b above.
17. Has the COVID-19 pandemic had any impact on the timing or the scope of this project? Does the University anticipate any significant impacts to the procurement process and/or the project scope, timeline, or objectives due to the rapidly-evolving COVID-19 crisis? If necessary, does the University anticipate any critical issues related to conducting the project predominantly or exclusively through virtual (telephone, videoconference) channels?

Response: At this time, we cannot assess the impact of the COVID-19 pandemic which is rapidly evolving daily. As the time for interviews of shortlisted firms grows nearer (interviews to be held May 21st), UMBC will assess the impact and advise accordingly. Similarly, the plan and communication tools for the consulting effort will be assessed with the awarded consulting firm.

18. The RFP includes the following sentence: “This should include opportunities related to national and international best and emerging financial aid optimization strategies…” Are you referring to best financial aid optimization practices for serving domestic and international students who are interested in UMBC? Or should we read this statement a different way?

Response: We would like to draw on global best practices for leveraging financial aid in student recruitment and yield.

19. Has UMBC previously worked with a vendor for financial aid optimization services?

Response: Yes. In the past, we have worked with EAB.

20. Does the intended scope of analyzing the potential persistence effects of financial aid include aid received after students’ first year (continuing students), or will the effort focus primarily on developing a financial aid regimen for incoming first-time full-time students and observing yield and persistence effects for aid received during their first year?

Response: The latter. The primary focus is developing an awarding strategy for incoming first-time students and observing impact on yield, retention and persistence of these students.

21. Page 4 of the RFP states that part of the UMBC SEP is to “continue to employ financial aid optimization as a strategy to enhance undergraduate yield and retention outcomes”. Is the intended scope to analyze the aid effects for only undergraduate students?

Response: Yes, only undergraduates.

22. Page 7 of the RFP states that the Consultant team should “Provide predictive modeling query tools to assist in the management and utilization of the financial aid optimization strategy.” Does the University seek to obtain predictive modeling queries/scripts, or does it seek an integrated technology solution and, if so, can UMBC define the parameters of the solution’s desired use and functionality?

Response: We are a PeopleSoft (PS) school. We use PS for financial aid packaging, awarding and administration. If the tool integrates well with PS that would be ideal. Otherwise, a stand alone query tool would be acceptable.