HURON

CAMPUS SOLUTIONS 9.2 FINANCIAL AID SUPPORT

LANEY COLLEGE

March 15, 2022

Submitted to:
Mildred Lewis, Dean of Enrollment Services
Laney College
510-464-3414
mildredlewis@peralta.edu

Submitted By:
Laura Zimmermann
Huron
312-583-8782
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March 15, 2022

Mildred Lewis
Dean of Enrollment Services
Laney College
900 Fallon St.
Oakland, CA 94607
510.464.3414
mildredlewis@peralta.edu

Re: Campus Solutions 9.2 Financial Aid Support

Dear Dr. Lewis:

Huron Consulting Services LLC ("Huron") is pleased to offer the attached Statement of Work (SOW) for Campus Solutions 9.2 Financial Aid Support.

Huron is the leader in providing process and technology support for higher education institutions and will bring this expertise to bear as part of this engagement. As evidence of our commitment, we have created a unique Student Lifecycle Solutions (SLS) practice that focuses on every aspect of the student journey— from recruitment, admissions, and enrollment, to graduation and alumni engagement—bringing together professionals with extensive experience in these functional areas and exceptional technology, operations and strategy expertise. Huron is a platinum member of Oracle's Partner Network and has extensive experience in higher education in managing software planning, implementation, and upgrade projects. Huron is uniquely suited to work with Delta in supporting your current needs within the financial aid application.

We appreciate the opportunity to work with Laney College and the Peralta Community College District and share common goals of providing a student-oriented solution that exceeds expectations. We look forward to next steps as we work with you to provide the most cost-effective and efficient support to achieve Laney's goals.

Sincerely,

Laura B. Zimmermann
Managing Director
312.583.8782

Statement of Work:

PeopleSoft Campus Solutions Financial Aid Support

Project Scope and Approach

Laney College, located in Oakland, California, is the largest of the four colleges in the Peralta Community College district, and serves approximately 17,000 students per year. The college uses the PeopleSoft Campus Solutions 9.2 student information system.

Federal Pell Grant Reconciliation and Transmission

In July 2021, Laney's newly-hired College Financial Aid Director, Jennifer Ma, learned that the institution had a large shortfall for the 2020-2021 financial aid year as a result of disbursing Federal Pell Grant awards to students that had not been successfully transmitted to or accepted by the U.S. Department of Education's Common Origination and Disbursement System (COD). After filing a support ticket with Oracle and engaging a third-party vendor, Laney was able to reduce this shortfall significantly.

However, Pell transmission and reconciliation remain an ongoing challenge for the college. At present, Laney has disbursed but not transmitted 1,200 Pell awards for 2021-2022. Their only avenue for recouping these untransmitted funds from the Department of Education is to review error reports provided by the Peralta district office, and manually correct each file listed in an attempt to resolve the discrepancy. Laney has requested that Huron:

- Review its Campus Solutions (CS) configuration and business processes related to Federal Pell Grant processing;
- Build or modify queries so that Pell validation, transmission, and disbursement errors can be identified and resolved promptly; and
- Train Financial Aid staff to accurately and efficiently resolve errors once they are identified.

Resolving these Pell configuration and processing issues is the number one priority for Laney's Financial Aid team. The Oracle representative who recommended that Laney seek Huron's assistance estimates that completing the above tasks will require two weeks of full-time work. Should funds remain in the project budget once the Pell-related issues have been resolved, the college has asked that Huron assist with the following efforts:

Return to Title IV Aid (R2T4)

Laney currently completes R2T4 calculations outside Campus Solutions, using the Return to Title IV module within COD. While the COD module is easy to use for the calculation itself, it does not integrate with CS, which means the college cannot easily incorporate data from COD R2T4 calculations into CS communications. Therefore, the college uses a completely manual process to send federally required R2T4 notifications to students: a staff member copies each student's information from COD individually and pastes it into an email. They would like assistance in exploring delivered CS R2T4 functionality and how this might allow them to automate R2T4-related student communications.

Census or Freeze Date for Late Start Classes

Laney bases students' Federal Pell Grant eligibility on their enrollment as of the institution's census date, regardless of when their classes actually begin. However, the college does not fully disburse Pell awards based on enrollment in late-start classes until those classes begin. At present, Financial Aid staff manage this process by running queries throughout the semester to identify students in late start classes, and manually adjusting these students' awards so they do not disburse before the late start classes begin. They have asked Huron to guide them in exploring their options for using different freeze dates for different types of awards, and for automating the Pell recalculation and disbursement hold processes for students in late start classes.

Given the college's ongoing challenges around Pell transmission and reconciliation, Laney has requested that an experienced financial aid consultant remain available on an as needed basis even after the above tasks are completed, in the event that additional Pell-related issues arise. An additional four hours per week have been allocated for this purpose for 15 additional weeks, as described in the Phase 2 section of the table below.

Project Schedule and Deliverables

The anticipated start date of this project is March 28, 2022. The anticipated duration is four weeks for Pell processing and reconciliation tasks, two weeks for the review of Campus Solutions R2T4 and communications functionality, and two weeks for the automation of multiple census dates.

The specific tasks in our approach are dependent upon the availability of Laney College Financial Aid staff and other subject matter experts. The table below provides a description of the key activities and deliverables within each workstream.

Pell Processing & Reconciliation		
Phase 1		
Estimated Time	**Activities**	**Deliverables**
80 hours (4 weeks)	• Evaluate Pell-related configuration and revise as needed to minimize the likelihood of disbursing untransmitted funds • Review current Pell error and exception reports; modify or develop new ones as required • Train Financial Aid staff in best practices for preventing, identifying, and resolving Pell-related errors and discrepancies • Document Pell-related configuration and recommended business processes	• Pell error resolution and troubleshooting queries • Configuration Guide • Business Process Guide
Phase 2		
Estimated Time	**Activities**	**Deliverables**
60 hours (15 weeks)	• Provide additional guidance and support for ongoing Pell reconciliation and data transmission as requested	• Pell error resolution and troubleshooting queries

Return of Title IV Aid (R2T4)		
Estimated Time	**Activities**	**Deliverables**
40 hours (2 weeks)	• Configure delivered R2T4 functionality • Prototype and demonstrate R2T4 business process and related communications	• Business Process Guide • Communication templates
Census (Freeze) Date for Late Start Classes		
Estimated Time	**Activities**	**Deliverables**
40 hours (2 weeks)	• Define and document desired business processes • Prototype and demonstrate how to accommodate desired process using delivered Campus Solutions tools • Build and validate population update queries	• Business Process Guide • Population Update queries

Project Staffing

The Huron team's roles, responsibilities, and time commitments are outlined in the table below. While we will attempt to comply with Laney's request for specific individuals, Huron reserves the right to assign and reassign our personnel, as appropriate, to perform the services. Laney reserves the right to review resumes of potential Huron resources and to request resource changes as necessary.

Role	Responsibilities	Hours
Project Manager	• Draft and maintain project plan and budget • Oversee work of functional and technical consultants • Serve as day to day point of contact for Laney project sponsor • Deliver weekly status reports	8 *Up to 1 hour per week*
Functional Consultant	• Share knowledge of Campus Solutions and financial aid best practices • Test configuration and business process changes in development environment • Develop and modify queries • Document configuration and business processes	Phase 1 - 160 *20 hours per week* Phase 2 – 60 *Up to 4 hours per week, as needed*

Technical Consultant	• Provide estimates of technical development required • Perform technical development and other technical tasks as needed • Provide guidance and knowledge transfer to Laney technical team	16 *Up to 2 hours per week, as needed*
Total Phase 1 Hours		**184**
Total Phase 2 Hours		**60**
TOTAL		**244**

Laney College Responsibilities

In connection with this engagement, Laney College will perform the tasks, furnish the personnel, provide the resources, and undertake the responsibilities specified below:

• Laney will designate an employee or employees within its senior management who will make or obtain all management decisions with respect to this engagement on a timely basis.
• To maximize the value of Huron's work and to keep the project moving on schedule, Laney agrees to comply with all of Huron's reasonable requests and to provide Huron timely access to all information and locations reasonably necessary to perform the services.
• Laney will provide support-role access to non-production environments and read-access to the production environment.

Huron's services are based on the following assumptions, representations and information supplied by Laney College:

• Laney will provide a Project Manager to facilitate and enable coordination of necessary database access, as well as configuration or development efforts.
• Throughout the duration of the project, Huron's team will be provided access to shared drives containing data and documentation necessary for this engagement, e.g. business process documentation, reports, PeopleSoft non-production environments, etc.
• Both parties will proactively participate in identifying issues and recommending solutions.

The successful delivery of services and the fees charged are dependent on (i) PCCD's timely and effective completion of its responsibilities, (ii) the accuracy and completeness of any assumptions, and (iii) timely decisions and approvals by PCCD's management. PCCD will be responsible for any delays, additional costs, or other liabilities caused by any deficiencies in the assumptions or in carrying out PCCD's responsibilities.

Project Cost

The budget for this engagement is estimated to be **$49,000** based on **244 hours** of effort described above: $38,000 for the 184 hours in Phase 1, and up to $11,000 for 60 additional hours in Phase 2. Huron will not exceed this amount without prior approval from Laney College. Huron will bill on a time and

materials basis based on the rates below. We expect that the work will be done remotely and have not included a travel budget. If travel is requested, it will be approved in advance by Laney College.

Role	Hourly Rate
Engagement Executive	$375
Senior Director	$320
Director	$275
Project Manager	$240
Senior Consultant	$210
Consultant	$175

Out of pocket expenses (including transportation, lodging, per diem meals, supplies, etc.) will be billed as incurred. Technology related expenses (including mobile phones, mobile internet access, databases, routine copying, faxing, printing, etc.) will be charged at a rate equal to 1% of professional fees, bringing the total expected cost to **$49,490**.

Terms & Conditions

This Statement of Work will be governed by the Master Agreement dated June 26, 2020 ("Master Agreement") between the Foundation for California Community Colleges and Huron Consulting Services LLC.

Please indicate your agreement by signing and returning to me a copy of this SOW. We appreciate the opportunity to be of service to you and enhance our work together on this engagement.

HURON CONSULITNG SERVICES LLC   **LANEY COLLEGE**

By: _____   By: _____

Name: Laura B. Zimmermann   Name: _____

Title: Managing Director, Huron   Title: _____

Date: _____   Date: _____