REQUEST FOR PROPOSAL

RFP
SCHOLARSHIP ASSESSMENT-2019

ADDENDUM NO. 1
Dated: 10/29/19

PROPOSAL MUST BE RECEIVED BEFORE:
5:00 PM, TUESDAY NOVEMBER 12, 2019

MAIL PROPOSAL TO:
Stephen F. Austin State University
Procurement Services
P. O. Box 13030
Nacogdoches, TX 75962-3030

HAND DELIVER AND/OR EXPRESS MAIL TO:
Stephen F. Austin State University
Procurement Services
2124 Wilson Drive
Nacogdoches, TX 75962

Show RFP Number, Due Date and Time on Return Envelope

NOTE: PROPOSAL must be time stamped at Stephen F. Austin State University Procurement Services before the hour and date specified for receipt of proposal.

REFER INQUIRIES TO:
Kay Johnson
Stephen F. Austin State University
Procurement Services
936-468-4037
email: johnsondk6@sfasu.edu
STEPHEN F. AUSTIN STATE UNIVERSITY
Request for Proposal #
SCHOLARSHIP ASSESSMENT-2019

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5:00 PM, TUESDAY NOVEMBER 12, 2019

ADDENDUM NO. 1

THIS ADDENDUM MUST BE ACKNOWLEDGED ON EXHIBIT B IN ORDER FOR
THE RESPONSE TO RECEIVE CONSIDERATION. FAILURE TO ACKNOWLEDGE
THE ADDENDUM WILL RESULT IN DISQUALIFICATION OF THE RESPONSE.

PLEASE NOTE THE FOLLOWING RESPONSES TO THE QUESTIONS RECEIVED:

1. Has a budget been established for the Scholarship Assessment project? If so, can you disclose?

    Answer: No.

2. Are you currently working with a vendor for services substantially similar to those requested in the RFP? If so, can you disclose?

    Answer: No.

3. The planned study start date is January 2020. Is the goal to impact the fall 2020 class?

    Answer: We will begin fall 2020 awarding in December 2019. I am not sure that we could change the financial awarding piece mid-year to impact fall 2020. Not to mention auditors concerns if we changed mid-year. The report outcome would definitely be used for fall 2021.

4. Is this incentive being driven by a strategic enrollment plan? What is the driving catalyst for this Scholarship Assessment?

    Answer: Yes. The driving catalyst for this assessment is to assess and effectively manage our scholarship program.

5. Is the university looking for an assessment of both undergraduate and graduate scholarship investments?

    Answer: Yes
6. Does the university require the successful firm to develop a financial aid annual plan?

   Answer: We are seeking a consultant to perform a thorough study and develop a financial aid strategy plan. We do plan to have a review periodically.

7. Will the successful firm work with you to both develop and deploy your financial aid strategy parameters?

   Answer: The successful firm will work with SFA to develop financial aid strategy parameters. SFA will deploy the financial aid strategies.

8. Will the firm be expected to match student characteristics with the appropriate merit-and need-based awards?

   Answer: Yes. Most of endowed scholarships have specific characteristics and thus must be awarded accordingly.

9. Are you interested in student-level scoring to model student behavior and score each admitted student based on their likelihood to enroll and their receptivity to aid?

   Answer: Yes

10. Are you interested in understanding the long-term (5 year) impacts of the recommended aid strategies?

    Answer: Yes.

11. Does the university require updates on progress toward goals with expertise to make any mid-course adjustments in strategy or modifications to individual awards?

    Answer: Yes

12. Is this RFP limited to first-time, full-time students, traditional undergraduates including transfers, or is it inclusive of all SFA admits?

    Answer: All admits.

13. Does SFA have an existing financial aid/ enrollment management partner?

    Answer: No. SFA does not currently use a third party servicer.
14. How does SFA currently handle enrollment predictions, tracking, and/or projections, as this is a standard component of our analytics/awarding partnerships?

**Answer:** The financial aid office will run projections for funds allocations monthly and yearly to make sure we are on track with awarding aid (excluding state aid and scholarship aid).

2.2 DETAILED INTENT AND SCOPE-Additions in red
Identify strategies that will:
- evaluate the efficacy of the university’s dual credit commitment.