

**Salem State University**  
**RFI 2017-12 Financial Aid Leveraging**  
**Addendum I**  
**Conference Minutes**  
**Date: June 28, 2017**

**SSU Attendees:** Scott James, Vice President for Enrollment Management, Student Life and Marketing; Evelyn Wilson, Director, Purchasing and Vendor Relations; Krista Ortolani, Purchasing Assistant.

**1. Overview**

Scott James began to give an overview of what Salem State University is looking for in terms of this analysis. He explained that over the nine years he has been here, we have steadily increased the amount of institutional aid that we are awarding to our students and that we just passed the \$3 million mark in institutional aid dollars and that he feels now there should be an in-depth, sophisticated analysis done on the impact that that aid is having on students' decisions to enroll and to stay at the university. He clarified that we would likely restrict this to just look at the incoming fall, unless the vendor wanted to talk us out of it and suggest that we include spring.

**2. Timetable**

All RFI proposals are due on Monday, July 17<sup>th</sup>, 2017 by 12:00pm. Any proposal received after 12:00 pm will not be accepted.

**3. Questions**

**Q: Are you looking for just a one year price at this time or are you looking for a multi-year contract?**

A: Initially, we're just looking for one year, but I think we would be open to proposals that might have a rationale for extending that. Right now, we are focusing on that year one need to have some detailed analysis done.

**Q: I have a question around the maintenance of your records and if you maintain the awards for non-matriculating students If you do, how far back does that go?**

A: We do, not sure how far back it goes. Before we issued this RFI, I confirmed that we could provide three years' worth of data including for this fall of 2017. I'm not sure how much further back it goes, but know that we could do at least three years.

**Q: Are you looking at this analysis to primarily help with awarding first time freshmen, or are you also looking to identify modifications to sophomore, junior, and senior year awards?**

A: I think we would have to talk about what that analysis looked like. Some of those questions would probably be answered sort of in discovery around what our practices are. We do roll forward institutional aid awards, so I think we'd be interested in some level of analysis on how that policy or the amounts that we are awarding might be impacting retention to years two, three, and four. If some level of analysis or even some other practice recommendations would suggest that we do that differently, we would want to know that.

**Q: What system are you using? How often would we be able to get as much real-time data as we could?**

A: We are using PeopleSoft. I think depending on the timing of this, our preference would be to do this at a point where we were substantially complete for fall. I think given the timing of the RFI and the selection process, we're not signing contracts until the end of July or beginning of August, so it is likely going to be late August at the earliest before we have data files to you anyway. If there was a rationale for needing to do more updates that we thought would impact the analysis substantially, we could do that, but I think we would prefer a one-time, sort of static, file.

**Q: Has it been posted in CommBuys? I have not been able to find it.**

A: It is posted because we did get a confirmation that it is posted in there. The CommBuys system is not easy to use, it takes a long time to be able to find things in there, but we are very happy to send you the RFI if you could give us your email. There is not a substantial difference on CommBuys compared to the RFI the way it is right now.