

**UNIVERSITY OF HAWAII
NOTICE OF AMENDMENT TO EXEMPTION FROM CHAPTER 103D, HRS**

Purchase Order No. / Contract No. C210047

Name of Contractor: Blue Icon Advisors

Description of goods or services:

Services to provide consultation and guidance in developing and aligning financial aid policies and procedures with the National Association of Student Financial Aid Administrators (NASFAA) standards across the seven University of Hawaii Community Colleges.

The scope of work for the purchase is revised as follows:

The University of Hawaii Community College System is requesting an addendum to the service contract that was secured to align and develop common policies and procedures across the seven University of Hawaii Community Colleges, with standards set by the National Association of Student Financial Aid Administrators. The additional services being requested is for consultation and guidance in developing standard operating procedures for the University of Hawaii Community College System.

Original Purchase Price:
\$ 99,875.00

Amended Purchase Price:
\$ 180,000.00 (est.)

Direct any inquiries to:

Department: Office of the Vice President for Community Colleges

Contact Name/Title: Judy Oliveira, Director of Student and Academic Support

Address: Honolulu Community College
874 Dillingham Boulevard, Building 28
Honolulu, Hawaii 96817

Phone Number:
(808) 842-2562

Fax Number:
N/A

Date Posted: June 24, 2022

Submit written objections to this notice of intent to amend a procurement exemption purchase within seven (7) calendar days from the date posted to:

Office of Procurement Management
1400 Lower Campus Road, Room 15
Honolulu, Hawaii 96822
email: OPM@hawaii.edu

REQUEST FOR AMENDMENT TO EXEMPTION FROM CHAPTER 103D, HRS

TO: OFFICE OF PROCUREMENT MANAGEMENT

FROM: Office of the Vice President for Community Colleges
(Department/Program)

Pursuant to APM Section A8.220, the Department requests an amendment to a contract or purchase order issued under a previously approved procurement exemption.

Purchase Order No./Contract No. PO 225130/Contract C210047

Name of Contractor: Blue Icon Advisors, NASFAA Consulting Services

Description of goods, services, or construction:

This request is for an addendum to a service contract that was secured to align and develop common policies and procedures across the seven UH Community Colleges, with standards set by the National Association of Student Financial Aid Administrators (NASFAA). The services being requested is to provide consultation and guidance in developing a customized Standard Operating Procedures (SOPs) for the UHCC system. Having standardized SOPs will ensure that Financial Aid Offices across the system are most efficiently processing and administering student aid, which is often complex and heavily burdened by federal legislation. Standard SOPs will also ensure that UHCC students, regardless of their home campus, will be receiving consistent services and support. This request is essential to the Financial Aid Centralization Project.

Original Purchase Price: \$ 99,875.00 Amended Purchase Price: \$ Est. \$180,000.00

(1) The scope of work will be revised as follows:

The development of customized standard operating procedures is an extension of the newly centralized policies and procedures currently being developed. SOPs are needed to provide step-by-step processing guidance to financial aid staff to ensure consistency and efficiency in processing and administration. In addition to developing SOPs, training for financial aid staff will also be provided. SOPs provide a good resource for institutions to guide staff on consistent processing in compliance with documented policies and procedures. Blue Icon will provide guidance and consultation for developing SOPs for the following sections of the newly developed policies & procedures manual: Packaging, Satisfactory Academic Progress, File Review and Verification, Return to Title IV, and Disbursement. After receiving consultation, guidance and training from Blue Icon, and with appropriate staffing, UHCC Central Financial Aid (CFAO) will have the knowledge, skills and capacity to write SOPs for other sections.

Services and tasks for the project extension:

- Develop a project plan in collaboration with UHCC CFAO;
- Identify the current centralized financial aid policies and procedures for the five sections mentioned above;
- Clarify processing actions with UHCC Central Financial Aid Office staff in alignment with systems setup and configurations to follow the documented policies & procedures;
- Develop step-by-step instructions that define the process required to comply with the identified policies & procedures;
- Use the Elucian Banner test system to confirm accuracy of written SOPs that require system actions
- Collaborate with UHCC Central Financial Aid Office staff during development to obtain approval to the final draft for each section
- Deliver staff training

(2) Explanation of the reasons that the amendment is necessary:

The development of common policies and procedures using NASFAA standards ensures that UHCCs policies and procedures are compliant with federal regulations. A thorough review and evaluation of each campus policies and procedures was necessary for this task. In this development process, it was revealed that having an aligned policy and procedures document may not necessarily translate to common practices and processes on the campus, which may result in differences in efficiency and the student experience.

To ensure consistency, efficiency, and an improved student experience, as outlined in the Financial Aid Centralization Project Charter, having a consistent standard operating procedures is necessary. Developing a detailed process documentation for financial aid staff in a timely manner is also critical. As the centralized policies and procedures manual and SOPs are being developed, staff at the CFAO, as well as campuses, are expected to implement and new processes changes in real time. The request for SOPs to be written timely is critical not only for the project, but also to ensure that processing and awarding continue to support and service our current students.

Direct questions to: Cathy Bio, Director of Student Success Phone: 808-984-3614

I CERTIFY THAT THE INFORMATION PROVIDED ABOVE IS TO THE BEST OF MY KNOWLEDGE, TRUE AND CORRECT.

Judy Oliveira, Dir of Student and Academic Supp
Full Name of Principal Investigator, Department Head, or Administrator

Judy P. Oliveira 04/29/2022
Signature Date

Lisa Tsuhako
Full Name of Fiscal Administrator

Lisa Tsuhako Digitally signed by Lisa Tsuhako Date: 2022.04.28 18:59:50 -10'00'
Signature Date

APPROVED:

Erika Lacro
Full Name of Vice President or Chancellor

Erika Lacro 6/1/22
Signature Date

FOR OPM USE ONLY

OPM COMMENTS:

APPROVED DENIED

David Lassner Digitally signed by David Lassner Date: 2022.07.15 08:50:09 -10'00' July 15, 2022
PRESIDENT, UNIVERSITY OF HAWAII DATE