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ADOPTED-BOARD OF TRUSTEES
COMMUNITY COLLEGE DISTRICT NO. 508
APRIL 4, 2024

BOARD OF TRUSTEES OF COMMUNITY COLLEGE DISTRICT NO. 508
COUNTY OF COOK AND STATE OF ILLINOIS

FINANCIAL AID SOFTWARE DOCUMENT IMAGING SYSTEM HYLAND SOFTWARE, INC.
THE OFFICE OF INFORMATION TECHNOLOGY/THE OFFICE OF STUDENT EXPERIENCE
DISTRICT WIDE
(AMENDMENT OF BOARD REPORT 34237 ADOPTED MAY 6, 2021)

THE CHANCELLOR RECOMMENDS:

that the Board of Trustees authorizes the Chair, upon final approval of the General Counsel as to the legal form of such agreements, to amend the agreement with Hyland Software, Inc. for a Financial Aid Software Document Imaging System for an additional \$63,733 in authority at a total cost not to exceed \$1,093,555 for the period starting no sooner than June 1, 2021 through June 30, 2024.

VENDOR: Hyland Software, Inc.
28500 Clemens Road
Westlake, OH 44145

USER: District Wide

TERM:

The term of this agreement shall commence on June 1, 2021, through June 30, 2024, with options to extend for an additional two (2) one-year periods.

SCOPE OF SERVICES:

The Document Imaging System software will create, collect, and store electronic financial aid documents which may include electronic signatures within an imaging repository. The processing of the student financial aid verifications will be district wide and processed in house by financial aid staff at the institution.

The additional funding will provide additional support in preparation of the new 2024-2025 Financial Aid Year including:

- Technical support of the new FA verification system which includes ongoing security and other technology periodic upgrades
- Customizations and configuration based on new FA regulatory requirements and changes
- Development and delivery of additional end user training

Hyland will provide a three-phase project to help support CCC's goals to implement the Financial Aid Document Management and Verification Review solution, convert historical and legacy system documents, and enable users across various campuses to utilize the solution. The project phase includes:

- Financial Aid Document Management and Verification Solution Implementation
- Legacy Document Import
- Guided Project Change Management and Custom (End User) Training

Other requirements provided by Hyland's Software include:

- Software as a Service (SAAS) solution
- Allow users to scan/upload documents remotely (outside CCC network)
- Smart forms – Ability for users to complete online form as well as scan/attach documents
- Integration with DocuSign
- Integration with Peoplesoft Student Information System (SIS), Website (ccc.edu) and portal (my.ccc.edu)
- Integration with SharePoint
- Integration with Cloud storage (OneDrive, Google Drive, Box, etc....)

BENEFIT TO CITY COLLEGES OF CHICAGO:

The anticipated services are intended to provide CCC with an effective and efficient standardized solution, delivered using Hyland's expert knowledge of federal financial aid verification, developed over years of similar implementations by dedicated Higher Education Professional Services delivery team. Legacy document conversion (i.e., import) will be managed in conjunction with the solution implementation in order to provide CCC users with all of their important student financial aid information in one secure and consolidated location. To support the most successful rollout and adoption, Hyland is also proposing change management support, to guide CCC in planning and preparing users for the new solution, including a custom training component to educate additional and future solution users. Hyland will utilize a project methodology framework that has been refined by leveraging the experience gained from decades and thousands of past projects not just in Higher Education but in a variety of industries and technical disciplines.

VENDOR SELECTION CRITERIA:

Specifications were prepared by District Procurement staff and Request for Proposals (RFP) #MWJ2102 were publicly advertised on January 20, 2021. The RFP was sent to eleven (11) companies. Four (4) companies attended the Zoom pre-submittal conference on January 27, 2021. Two (2) companies responded on February 23, 2021: 1) Hyland Software, Inc. and 2) Accu-Image. Two (2) no-bids were received from Campus Logic and Nuxeo.

Both proposals were reviewed, evaluated and ranked by staff, which included the Offices of Student and Academic Affairs, Information Technology, and staff from Olive-Harvey and Wright Colleges. The evaluation committee members individually scored each proposal based on the evaluation criteria in the RFP:

- Technical solution and capabilities
- Company's ability to support and execute this project, in terms of resources, experience, strategic thinking, and vision. Evidence that company is forward thinking and aware of current and future trends in technology, marketing, analytics, and customer engagement.
- Marketing and creative approach, brand management
- Portfolio of past work
- Price

The two proposals were reviewed and evaluated. The committee short-listed Hyland Software based upon its score and invited it for an oral presentation and demonstration. The evaluation committee individually scored the presentation/demonstration based on the following criteria:

1. Verification workflow
2. Grouping documents/queried report
3. Conversion capabilities
4. Capability to use our own storage
5. Change management process
6. Setup parameters, roles, permission lists
7. DocuSign integration (e-signature process)
8. Smart Logic forms
9. Administrator access, capabilities and configuration
10. Student Access - same portal as PeopleSoft
11. Parent/Spouse access (do they have this? Separate logins?)
12. Staff Access - Levels of security
13. Workflow processing
14. Reporting/Dashboard
15. Interface with PeopleSoft
16. Test environments
17. Training Plan
18. Examples of annual security audits
19. Sample Project Plan/Timeline
20. Hardware required
21. Customer Support

The evaluation committee recommends proceeding with Hyland Software, Inc. This vendor scored highly in both the written and oral responses. They presented an out of the box solution and thorough implementation and training plan for the institution with a simplified approach to document imaging for students, parents and staff. Hyland also demonstrated experience implementing large university and enterprise solutions as well as department level solutions. Their demo showed they pay attention to the details while offering a solution that can benefit all of CCC's departments. Their OnBase product is user friendly and easily customizable to look like a CCC page.

MBE/WBE COMPLIANCE:

The Office of Procurement Services has reviewed the proposed compliance plan and has determined the Vendor has complied with the Board Approved MBE/WBE Contract Participation Plan:

<u>Vendors</u>	<u>MBE or WBE</u>	<u>%</u>	<u>Participation</u>	<u>Certifying Agency</u>
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Clarity Partners, LLC 20 N. Clark St., Ste. 3600 Chicago, IL 60602	MBE	25.66	Direct	State of IL - CEI
The Frances Group, Inc. 9901 S. Western Ave., Ste. 205 Chicago, IL 60643	WBE	7.5	Direct	Cook County

GENERAL CONDITIONS:

Inspector General- It shall be the duty of each party to the agreement to cooperate with the Inspector General for City Colleges of Chicago in any investigation conducted pursuant to the Inspector General’s authority under Article 2, Section 2.7.4(b) of the Board Bylaws.

Ethics – It shall be the duty of each party to the agreement to comply with the applicable provisions of the Board’s Ethics Policy adopted January 7, 1993, and as amended by the Board.

Contingent Liability – Pursuant to Section 7-14 of the Illinois Public Community College Act, all agreements authorized herein shall contain a clause that any expenditure beyond the current fiscal year is subject to appropriation in the subsequent fiscal year.

FINANCIAL

Total: \$1,093,555

Charge to: The Office of Information Technology

Sources of Funds: Education Fund

FY24: 53/540000-00003-0023006-80000

Respectfully submitted,

**Juan Salgado
Chancellor**

April 4, 2024 – The Office of Information Technology/The Office of Student Experience