

# Request for Proposal

**RFP 752-19-921DH**

**Student Refunding Processor  
Services**

## UNT SYSTEM for UNT Student Financial Services

- Pre-Proposal Meeting
- Friday April 26, 2019
- 2:00 p.m.

## AGENDA

- INTRODUCTION
- SERVICE DESCRIPTION
- SUBMISSION REQUIREMENTS/CRITERION
- CONTRACT
- SELECTION PROCESS
- REQUIREMENTS
- QUESTIONS

## **PROJECT DESCRIPTION**

1. UNT and UNT Dallas is currently using a vendor for refunding students credit balances to students and parents (Parent/PLUS Loans). The contract period for this vendor has expired. Student Financial Services (SFS) for UNT and UNT Dallas is responsible for refunding credit balances to students. SFS is seeking a vendor to process these refunds to students and parents via various refunding options as outlined in this Request for Proposal (RFP).

2. UNT and UNT Dallas currently process all student and parent refunds through the Oracle/PeopleSoft Campus Solutions Student Financials system and the Oracle/PeopleSoft Enterprise Financials/Accounts Payable system. Both Campus Solutions and Enterprise Financials are on version 9.2 and “PeopleTools” version 8.56. UNT System plans to upgrade to “PeopleTools” version 8.57 within the next 12 months.

## SUBMISSION REQUIREMENTS/CRITERIA

1. Contractor meets requirements as listed in proposal
2. Refund process, disbursements process
3. Banking Relationship
4. Security
5. Implementation, Training, Future Support Teams
6. Financial Agreement
7. Pricing
8. Overall completeness of the proposal

## CONTRACT

- A Sample Service Agreement is included in the RFP package.
- Note that UNT System is not expecting any modifications to the contract and any changes or modifications will not be accepted by UNTS (owner).

## SELECTION PROCESS

- **Responses are due May 14, 2019 @ 2:00p.m.**
- **Pages should be printed one-sided on 8 1/2" x 11" paper.**
- **Submit one (1) paper loose unbound original and one (1) virus free CD ROM or flash drive, Note that information on the paper copy must match the electronic copy. Paper copy must have original signature. QR codes will not be accepted as part of your response.**
- **Responses are submitted to Business Service Center, Woodhill Square, 1112 Dallas Drive, Suite 4000, Denton, Texas 76205**
- **Anticipate evaluation complete June 2019 with Service Agreement signed July 2019**

## REQUIREMENTS

- **Provide a single point of contact with phone number and email**
- **Make sure you address each criteria listed under the “Evaluation Criteria” that starts on page 4 Section 2.3 Evaluation Criteria.**



## QUESTIONS

- Questions should be directed to Denise Harpool, Senior Buyer - Procurement – please email questions to:

[denise.harpool@untsystem.edu](mailto:denise.harpool@untsystem.edu)

- Questions must be received by May 01, 2019 by 2:00 p.m. – questions & answers will be posted to UNT System website by May 06, 2019 by 5:00 p.m.
- Questions & answers and any addendums will be posted to <http://www.untsystem.edu/hr-it-business-services/procurement/purchasing/bid-opportunities> and <http://www.txsmartbuy.com/sp>

## Final Thoughts Reminders: RFP752-19-9DH

<b>April 26, 2019</b>	<b>2:00 p.m.</b>	<b>Pre-Proposal Conference</b>
<b>May 01, 2019</b>	<b>2:00 p.m.</b>	<b>Deadline for Submission of Questions</b>
<b>May 06, 2019</b>	<b>5:00 p.m.</b>	<b>Responses to Questions Post on Website</b>
<b>May 14, 2019</b>	<b>2:00 p.m.</b>	<b>Deadline for Submission of Qualifications</b>
<b>July 2019</b>		<b>Award Service Agreement</b>

**Review submission documents for completeness, review proposal to be sure that you have submitted all requested criteria as they were listed in order. Review for all required signatures.**