

## Executive Assistant

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**Subject:** FW: Global Financial-Purchasing Exception Memo  
**Attachments:** Global Financial-Purchasing Exception Memo.docx

**From:** "Birgitte Ryslinge (me)" <[birgitte.ryslinge@oregoncoastcc.org](mailto:birgitte.ryslinge@oregoncoastcc.org)>  
**Date:** Thursday, June 27, 2019 at 4:28 PM  
**To:** Robin Gintner <[robin.gintner@oregoncoastcc.org](mailto:robin.gintner@oregoncoastcc.org)>  
**Cc:** Executive Assistant <[ea@oregoncoastcc.org](mailto:ea@oregoncoastcc.org)>, Cindy Carlson <[ccarlson@oregoncoastcc.org](mailto:ccarlson@oregoncoastcc.org)>, "Lara, Daniel" <[dan.lara@oregoncoastcc.org](mailto:dan.lara@oregoncoastcc.org)>  
**Subject:** FW: Global Financial-Purchasing Exception Memo

Dear Robin,

Thank for the memo in regards to contracting guidelines and your recommendation that we proceed contract negotiations with Global Financial for 3<sup>rd</sup> party financial aid processing. This email shall serve as documentation of my acceptance of your recommendation and authorization to enter contract negotiations. Please work with Kathy to get the appropriate notification on the July Board agenda as an information item. We may want to provide the memo itself to the Board as context.

As noted in separate communications, there are an unusual number of contract requirements established by the Department of Education for third party financial aid servicers (including a federal listing of approved 3<sup>rd</sup> party servicers). Please work closely with Cindy and Ann to ensure the contract meets these requirements. I've attached the NASFAA ppt that addresses some of these. I believe there is also a federal unit specific to 3<sup>rd</sup> Party processors and they might have guidelines.

Thanks to you and all that have put in much effort to get us this far. Nice work!



Birgitte Ryslinge, Ph.D.  
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OREGON COAST  
COMMUNITY COLLEGE



## Memo

**Date:** June 27, 2019  
**To:** Dr. Birgitte Ryslinge, President  
**From:** Robin Gintner, Chief of Finance & Operations  
**CC:** Cindy Carlson, Dean of Students  
Dan Lara, Chief Academic Officer  
**RE:** Purchasing Requirements Exception – Global Financial Services

### Introduction

As part of our goal to provide students with federal financial aid beginning with the 2020-21 academic year, the Executive Team has indicated a preference for contracting with a third-party provider to assist in the packaging and processing of our Title IV financial aid. Staff have reviewed the options that are available for integration with the new Campus Nexus ERP and are recommending Global Financial Services as the third-party provider.

With implementation costs and travel, the Year 1 contract amount is estimated to be \$50,000. Year 2 and beyond is estimated to be \$42,595. This memo outlines the applicable Board policies and Oregon State Statutes that guide our procurement process and also includes my recommendations on how to proceed.

### Issue

Board Policy 6330, Purchasing, in keeping with guidelines found in ORS 279B-070, Intermediate Procurements, establishes the need for three written vendor quotes to be reported to the Board of Education, for any annual purchase that is within the \$25,000-\$100,000 range. Because Global Financial Services is the sole partner that Campus Management has for third party processing of financial aid within its Campus Nexus Student system, there are no other vendors from whom to seek a quote for services in order to be in compliance with this Board policy.

### Findings and Determination of Exception

Board Policy 6330 also states that the College follows the guidelines of the Community College Rules of Procurement (CCRP). Along with ORS 279B.075, Sole-Source Procurements, the CCRP provides an exception (CCR.310) to the competitive procurement process where it can be demonstrated that 1.) the goods or services are available from only one source and 2.) when the use of that sole source has been deemed by the chief financial officer to be in the best interest of the College:

**NORTH COUNTY CENTER**  
Small Business Development Center  
3788 SE High School Dr.  
LINCOLN CITY, OR 97367  
(541) 996-6222 FAX (541) 996-4958

**NEWPORT / CENTRAL CAMPUS**  
400 SE College Way  
NEWPORT, OR 97366  
(541) 867-8532 FAX: (541) 265-3820

**SOUTH COUNTY CENTER**  
3120 Crestline Drive  
WALDPOR, OR 97394  
Mailing Address: 400 SE College Way  
NEWPORT, OR 97366

To qualify as a sole source, it must be determined that efficient utilization of an existing service (in this case, Campus Nexus Student) requires acquiring a compatible service (Global FAS) that is only available from one source. We know that the software used by the financial aid third-party processor that we choose must be specifically compatible with Campus Nexus. Campus Management has indicated via email, that they do not have any partners for third-party financial aid processing other than Global Financial Services. From their email – “Global FAS is the only integrated option.”

Global Financial Services software has obvious demonstrated compatibility with Campus Nexus Student as it is already integrated into their software. Additionally, the Global FAS software is only available directly from Global Financial as the “manufacturer” (there is no reseller of the Global FAS software). These things taken together, qualify Global Financial Services as “sole-source” and exempted under the guidelines of the State statute and CCRP from the 3-vendor-quote requirement.

#### Recommendation

The College has budgeted \$50,000 for a third-party financial aid processor. The proposal from Global Financial Services indicates that it is for the 2020-21 award year processing and gives a fee schedule for determining costs in and beyond year one, as detailed in the introduction.

As Global Financial Services is the only third-party financial aid processor with whom Campus Management has a partnership and an already-established integration in the Campus Nexus software, I recommend that we proceed with negotiating a contract with Global Financial Services for the services of financial aid processing within Campus Nexus.

Per Board Policy 6340, Bids and Contracts, as this contract would not have an annual value of greater than \$100,000, it is within the authority of the President to enter into it without Board ratification, however, given the use of an exception to the procurement process, it should be reported out to the Board as a courtesy.