



COLUMBIA GORGE
COMMUNITY COLLEGE

Student Information System Request for Proposal

Columbia Gorge Community College

Information Technology Services

Student Information System

Request for Proposal

RFP #: ITS-2026-02

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Purpose	7
College Mission and Student Profile.....	7
College Experience with SIS.....	8
Proposal Instructions	9
Anticipated Schedule.....	9
Proposal Submission.....	10
RFP Contact.....	10
RFP Contact Details.....	10
Pre-Proposal Conference.....	11
Instructions to Contractors	11
Request for Proposal Documents.....	11
Requests for RFP Clarification and/or Interpretation.....	11
Incurred Costs.....	11
No Warranty.....	11
Statement of Time.....	12
Rights of College to Award or Reject Proposals.....	12
Notice of Intent to Award.....	12
Notice to Proceed.....	12
Protest of Intent to Award.....	12
Requests and Deadline for RFP Changes or Substitutions.....	13
Protest of Solicitation Document and the Procurement Process.....	13
Additional Information.....	13
Right to Modify Process.....	13
Proposal Submission	13
Economy of Proposal Preparation.....	13
Format and Content.....	14
Title and Signature Page.....	14
Table of Contents.....	14
Organization.....	14
Company Profile.....	14
Case Histories as Examples of Relevant Experience and References.....	15
Partnerships and Outsourced Functions.....	15
Company Ownership / Financials.....	15
Proposer Position.....	15
Proposer Disclosure.....	15
Proposer Third-Party Servicer SOC Reporting and Oversight.....	16
Product Delivery Methodology / Implementation.....	16
Description of the System.....	16
Data Access to Legacy Data.....	16
Training.....	17
Testing.....	17

General System Acceptance Requirements.....	18
Installation Acceptance Test.....	18
Functional Acceptance Test.....	18
Data Configuration Acceptance Test.....	18
Throughput and Projected Load Acceptance Test.....	18
Reliability Acceptance Test.....	18
Maintenance.....	18
Cost Proposal.....	19
Acceptance of Proposal Content.....	19
Public Records and Confidentiality of Proposal.....	19
Public Records.....	19
Execution of the Proposal.....	20
Proposer/Authorized Signer.....	20
Partnership Proposer/Authorized Signer.....	20
Limited Liability Company (LLC) Proposer/Authorized Signers.....	20
Corporation Proposer/Authorized Signer.....	20
Joint Venture/Authorized Signer.....	20
Withdrawal of Proposals.....	20
Proposer's Forms.....	20
Signed Addendum Required with Proposal.....	21
Proposal Selection Process.....	21
Phase 1 - Evaluation Criteria.....	22
Phase 2 - Demonstrations.....	23
Product Operation: Core Functional Scoring (60% of Total Grade).....	24
Product Revision & Transition (20% of Total Grade).....	26
Qualitative Feedback & Final Recommendation (20% of Total Grade).....	27
Customer Reference Checks and Site Visits.....	28
CONTRACT TERMS AND CONDITIONS.....	28
General.....	28
Invoicing.....	28
Right to Audit.....	28
Termination for Lack of Appropriations.....	28
Debarment of Proposer.....	28
Laws of the State of Oregon.....	29
Successful Proposer's Compliance with Tax Laws.....	29
Pay Equity Compliance.....	30
Contract Award.....	31
Offer Evaluation/Award and Right to Reject all Proposals.....	31
Negotiations with any Proposer(s).....	31
Contract Administrator.....	31
Non-Assignment.....	32

Form of Procurement Contract.....	32
System Contractor’s Compliance with Tax Laws.....	33
Cooperative Procurement.....	34
Definitions.....	34
Human Rights.....	35
Solicitations for Subcontracts, Including Procurements of Materials and Equipment.....	35
Discrimination in Subcontracting Prohibited.....	35
Scope of Services.....	36
Primary Functions for Review.....	36
Foundation: Curriculum & Assessment.....	36
Entry: Open & Limited Admissions.....	37
Specialized: Pre-College & Community Education.....	37
Integration: LMS & Identity Management.....	37
Support: Learning Commons, Advising, & Library.....	37
Compliance: Federal & State Reporting.....	38
Detailed System Requirements.....	38
Non-Functional Requirements.....	51
Key Stakeholders.....	55
College Process Descriptions And Required Functions.....	56
The Student Record.....	56
Maintenance and Storage of Student Record.....	58
Access and Disclosure (FERPA Guidelines).....	59
Requesting Transcripts and Records.....	59
Admissions Data and Lifecycle.....	60
Data Collected for Enrollment and Placement.....	60
Enrollment and Administrative Data (Required for all Applicants).....	60
Academic and Placement Data (Required for Course Enrollment).....	60
Admissions Determination and Placement Process.....	61
Phase A: General Admission Determination (Open Access).....	61
Phase B: Placement Determination (Focus on Student Success).....	61
The Admissions Lifecycle.....	62
Stage 1: Prospect and Recruitment (applicant).....	62
Stage 2: Enrollment and Placement (cleared to register).....	62
Stage 3: Current Student and Progression (.....)	62
Stage 4: Completion and Outcome.....	62
Advising and Outreach Requirements in the New SIS.....	63
Communication and Automated Outreach.....	63
Consistent Record-Keeping and Case Management.....	63
Student Progression and Enrollment Guidance.....	64
Enrollment Status Tracking.....	64
Financial Aid Processing.....	65

General Eligibility and Application.....	65
Satisfactory Academic Progress (SAP) Requirements.....	67
R2T4 Accuracy, Timeliness, and Documented Review Controls.....	68
Exit Counseling Automation and Tracking.....	69
SIS Financial Integration Requirements.....	70
Federal Financial Aid Compliance: Additional Controls.....	70
NSLDS Enrollment Reporting Controls.....	71
Outstanding Title IV Disbursement Monitoring.....	71
Academic and Enrollment Requirements.....	72
Automated Application Intake and Evaluation.....	72
College Now / Early College Enrollment processes.....	74
Community Ed / Concurrent Enrollment.....	75
o Records: Non-credit courses typically do not create a permanent academic transcript in the same way that credit-bearing courses do.....	76
Advising Processes.....	76
Flexible Student Status Management Workflows.....	77
Instructional Services & Learning Commons.....	79
Faculty Portal & SIS-LMS Integration.....	79
Library Services & Resource Accountability.....	80
Learning Commons: Tutoring, Testing, & Early Alert.....	80
Community Ed & Specialized Instruction.....	81
Pre-College Programs (GED & ESOL).....	81
Nursing & Health Occupations.....	82
Career & Technical Education (CTE) and "College Now".....	82
Curriculum, Assessment, & The Library.....	82
Business Services — Student Financial Services (Required).....	84
Student Ledger & Course-Fee Mapping.....	84
Financial Aid Integration & Cash Management (Separation of Functions).....	85
ERP Transaction Export.....	86
Fund Sources, Agency Billing, and Third-Party Sponsor Tracking.....	87
• Tracking and Reporting by Agency: Staff must be able to produce a report or ledger view showing all students funded by a given agency in a given term, the amounts designated, amounts invoiced, and amounts received. This visibility is essential for reconciliation and grant reporting.....	88
Automated Accountability, Holds, and Audits.....	88
Collections and Past-Due Account Management.....	89
Student Financial Self-Service Portal and Cashiering.....	89
Student-Facing Portal.....	89
Third-Party and Authorized Payer Portal.....	90
Cashiering and In-Person Payments.....	90
System Integrations.....	90
Artificial Intelligence Capabilities & Integration (Optional).....	91

Key agentic functions (optional).....	92
Generative Conversational User Interface (optional).....	92
Security, Privacy, and Federal Regulatory Compliance Baseline.....	93
Glossary of Terms and Definitions.....	94
Statutory and Institutional Definitions.....	94
Academic and Student Lifecycle Statuses.....	94
Financial Aid and Technical Terms.....	95
Appendix.....	97
Appendix A: Sample Professional Services Agreement.....	98
Appendix B: Sample Insurance Provisions.....	106
Appendix C: Sample Cost Proposal.....	108

Purpose

Columbia Gorge Community College (CGCC) is seeking proposals from qualified vendors for the procurement, configuration, implementation, and long-term support of a **modern, fully-integrated Student Information System (SIS)**. This system will replace the existing cloud based system Campus Nexus Student by Anthology.

The college's strategic vision is to **innovate and excel** while championing equity and inclusion. The modernization of the Student Information System (SIS) is a critical project to achieve these goals, specifically by addressing problems related to student support services.

The objectives that the new SIS must support include:

- **Improving Student Success:** Achieving equitable retention and graduation rates, particularly for first-time, low-income (Pell), and non-traditional students.
- **Enhancing Advising Capacity:** Strengthening and improving student support services by enhancing advising processes and functions to address barriers to student success.
- **Technology Foundation:** Providing robust and sustainable technology that can handle complex functions like online registration, grading, financial aid support, and transcripts.

Columbia Gorge Community College (CGCC) is a public two-year community college located in Oregon. It operates as the sole institution of higher education in the region, serving residents in a large, rural area of approximately 10,000 square miles across seven counties in Oregon and Washington.

College Mission and Student Profile

CGCC's core mission is centered on **equity and inclusion**, striving to prioritize equitable access to education and empower all students through learning to drive inclusive prosperity throughout the community.

- **Service Area:** The college's tax district primarily includes Wasco and Hood River counties, but its service area expands to five other rural counties (Sherman, Wheeler, Gilliam, Klickitat, and Skamania). CGCC operates main campuses in **The Dalles** and **Hood River**, both within the Columbia River Gorge National Scenic Area.
- **Student Diversity:** The college is federally designated as a **Hispanic-Serving Institution (HSI)**. Nearly **35%** of the total student body identifies as students of color, with **Hispanic students making up approximately 24%** of the credit enrollment.
- **Student Types:** CGCC serves a diverse range of learners, including:
 - English language learners.
 - GED® seekers and those in pre-college programs.
 - Recent high school graduates and those pursuing transfer degrees to four-year institutions.

- Students seeking career and technical education (CTE) in high-demand fields like healthcare, manufacturing, and construction, as well as short-term certificates.
- CGCC also provides services to dual-enrolled high-school students, which accounts for approximately 18% of the college's student FTE.
- CGCC serves approximately **1,390 students annually** from the Mid-Columbia region. The student population is heavily **part-time (over 65%)**. A significant number of students **(50%) receive pell grants financial aid**.

College Experience with SIS

Columbia Gorge Community College (CGCC) is entering its third implementation of an electronic Student Information System. CGCC previously used RogueNet, a homegrown SIS developed by Rogue Community College. CGCC licensed and operated this system for a number of years. However, support for RogueNet eventually expired, and its functionality could no longer meet the evolving needs of the college. This led CGCC to seek a more modern SIS solution.

Anthology Campus Nexus Student: CGCC transitioned to Anthology Campus Nexus Student as its new SIS. This was done to improve efficiency, streamline processes, and enhance the overall experience for students and employees. Instead, Anthology Campus Nexus Student created many complex and technically inefficient processes that resulted in a heavier administrative burden on staff.

Some of these issues include:

- **Integration Issues:** Difficulty integrating with other systems used by the college, such as the bookstore's point-of-sale system, or the finance platform, or the student application & CRM.
- **Customization Limitations:** Inability to customize the system to meet the specific needs and workflows of CGCC.
- **Usability Challenges:** Difficulty for staff and students to navigate and use the system effectively.
- **Reporting and Data Analysis:** Limitations in generating accurate and timely reports for decision-making. Some reports are simply not possible. This includes mandatory state and federal reporting.
- **Vendor Support:** Inadequate support from the vendor in addressing issues and providing timely updates. Ultimately tech support was very difficult given the extreme difference in time zones and language barrier.
- **Cost and Budget:** Unexpected costs associated with implementation, maintenance, or customization. What the college expected to be a part of the cost turned out to be “add-ons” that cost significantly more than the other SIS systems that had a higher all inclusive initial cost.

Proposal Instructions

Anticipated Schedule

Event	Deadline Date/Time
RFP Release Date	<i>July 2 2026</i>
Voluntary Pre-Proposal Conference (Virtual)	<i>July 13 2026</i>
Final Submission of Questions on RFP	<i>July 14 2026</i>
Addendum Posted (Answers to Questions)	<i>July 15 2026</i>
RFP Closing Date & Time (Submission Deadline)	<i>August 5 2026</i>
Notice of Invitation to Demo (Shortlist)	<i>September 7 2026</i>
Onsite or Virtual Demonstrations/Interviews	<i>Oct 1 - Oct 31 2026</i>
Onsite Reference Checks / Reviews	<i>November 2026</i>
Notice of Intent to Award Contract	<i>December 14 2026</i>
Contract Award (Anticipated)	<i>December 31 2026</i>

Proposal Submission

Proposals will be received no later than 4 p.m. (local time), August 5 2026. Proposals will only be accepted electronically via OregonBuys.

NO LATE PROPOSALS WILL BE ACCEPTED.

Your proposal must be uploaded prior to the Closing Date and Time at 4 p.m. (local time). The College strongly recommends that you give yourself sufficient time and at least ONE (1) day before the closing date and time to begin the uploading process and to finalize your submission.

The College accepts no responsibility for non-receipt and/or delays in receipt caused by transmission and reception problems, equipment failure, or any other similar cause.

Each Proposal is instantly sealed and will only be visible to the College after the closing date and time.

Uploading large documents may take significant time, depending on the size of the file(s) and your internet connection speed.

You will receive an email confirmation receipt once you finalize your submission.

Minimum system requirements: Microsoft Edge, Google Chrome, or Mozilla Firefox. JavaScript must be enabled. Browser cookies must be enabled.

Need help? Please contact the RFP Contact for technical questions related to your submission. Contacting any others for information will result in removal from the RFP process.

RFP Contact

The RFP Contact is Andrew Burke. The RFP Contact Details are below.

All contact must be in written form via Email, except for urgent purposes, which may be initially directed over Phone.

All Email contact must Prefix the email subject line with:

RFP-SIS:

RFP Contact Details

Andrew Burke

Email: aburke@cgcc.edu

Phone: 541-506-6000 ext. 7000

Pre-Proposal Conference

Prospective Proposers will be given an opportunity to attend a universal discovery session with the College virtually. The purpose of this conference is to provide vendors the opportunity to review RFP with college representatives and ask questions about the existing system from Information Technology Services.

Attendance is optional and limited to one person per vendor, preferably a systems architect or engineer. There will be questions allowed and documented during the session; questions will be submitted in writing following the conference as well with answers posted later. See Table 1 for a timeline of events.

Instructions to Contractors

Request for Proposal Documents

Prospective Proposers may obtain the solicitation documents by registering on the Oregon e-procurement system, OregonBuys, website and downloading them. Proposers shall consult the OregonBuys system regularly until the closing date and time to avoid missing any notices. To register on OregonBuys, go to <https://OregonBuys.gov/>. The College shall advertise all Addenda on OregonBuys. Prospective proposers are solely responsible for checking OregonBuys to determine whether any Addenda has been issued. RFP documents will be posted and electronically mailed to 'select' or 'preferred' potential proposers.

Requests for RFP Clarification and/or Interpretation

Any person who contemplates submitting a proposal in response to this RFP and who finds discrepancies in, omissions from, or is in doubt as to the true meaning of any part of this RFP must submit any clarification or questions in written format, or at the pre-proposal conference only.

Incurred Costs

Neither the College, nor its officers, agents, nor employees are liable for any cost incurred by Proposer(s) prior to issuance of an agreement, contract, or purchase order. All prospective Proposer(s) who respond to this RFP do so solely at the Proposer's cost and expense.

No Warranty

All facts and opinions stated within this RFP and all supporting documents and data are based

upon information available from a variety of sources. No representation or warranty is made with respect thereto.

Statement of Time

A period, unless stated as a number of College business days, shall include Saturdays, Sundays, and holidays. The word “day” as used in this RFP document, and any resulting contract awarded as a result of this process, shall constitute a calendar day of 24 hours measured from midnight to the next midnight. When a time period is identified by days, it is computed by excluding the first day and including the last day. When the last day falls on a Saturday, Sunday, or the College's holiday, that time period shall extend to the next College business day.

Rights of College to Award or Reject Proposals

This RFP does not commit the College to award or enter into a contract. Under no circumstances will the College be responsible for or pay the costs incurred in the preparation of a response to this RFP. The College reserves the right to accept or reject any or all proposals or any portion thereof received as a result of this RFP.

Notice of Intent to Award

All responsive and evaluated respondents to this RFP will be notified of the College's intent to award contracts not less than seven (7) days prior to award. The College will issue a notice of intent to award based on the results of its evaluation process.

Notice to Proceed

The System Contractor may be given ten (10) calendar days to execute the contract and return it to the College. Contractual work may not begin until the notice to proceed has been issued. The notice to proceed will be issued after execution of the contract by the College. The notice to proceed will authorize commencement of the work based on the contract.

Protest of Intent to Award

A Proposer may protest the intent to award such contracts if the Proposer claims to have been adversely affected or aggrieved by the selection of a Proposer. A Proposer submitting a protest must claim that the protesting Proposer is the highest ranked Proposer because the proposals of all higher ranked Proposers failed to meet the requirements of the RFP or because the highest ranked Proposers otherwise are not qualified to perform the services described in the RFP. The Proposer must deliver the written protest to the RFP Contact within seven (7) days after issuance of the notice of intent to award the contract. A Proposer's written protest shall specify the grounds for protest to be considered by the College pursuant to ORS 279B.410(2).

The Project Manager shall not consider a Proposer's contract award protest submitted after the above timeline.

Requests and Deadline for RFP Changes or Substitutions

Any person who contemplates submitting a proposal in response to this RFP and who wishes to have the College consider a change in any part of the RFP document must submit the proposed change and the reason for the change in writing to the RFP contact. Protest against the award based on the specifications or other contents of this RFP will not be considered after this time. Changes to this RFP document shall be by written addenda only and posted on OregonBuys and email to "select" or "preferred" potential proposers.

Protest of Solicitation Document and the Procurement Process

A prospective Proposer may protest the procurement process or the solicitation document for a contract as per the Protest of Intent to Award section. A prospective Proposer must deliver a written protest to the College.

The prospective Proposers shall indicate the reasons for the disagreement through a written protest and shall include a statement of the desired changes to the procurement process or the solicitation document that the prospective Proposer believes will remedy the conditions upon which the prospective Proposer based its protest on.

Additional Information

The College reserves the right to request additional information following their initial review of the proposals that the College deems necessary to evaluate, rank, and select the most qualified Proposer. College staff may conduct a review and verification of confidential information with staff and consultants.

Right to Modify Process

The College reserves the right to modify the selection process or other aspects of this RFP process at its sole discretion. The Contracts and Procurement Office will take reasonable steps to ensure that any modification or clarification to this RFP is posted on OregonBuys.

Proposal Submission

Economy of Proposal Preparation

Proposals shall be prepared simply and economically, by providing a straightforward, concise description of the Proposer's capabilities related to specified elements, units, or services.

Proposals should not include any information not specifically identified or specified as a required response.

The proposal shall describe how you will perform the required activities and the necessary resources to perform the activities. Proposals shall be prepared simply and economically, providing a straightforward, concise description of the proposer's capabilities to satisfy the requirements. Special bindings, colored displays, promotional materials, etc. are not desired. Emphasis should be on completeness and clarity of the content.

Format and Content

It is highly recommended that the Proposers organize and present their proposal materials in the same order as presented below. Proposals received without following this format and without the required information may be rejected as non-responsive. In addition, proposals must be received by the College in strict compliance with the requirement for submittal date, time, and place as stated in this RFP.

The proposal shall include, but are not limited to, the following items which are to be returned in the response:

Title and Signature Page

Proposer shall include a title page which includes the name of the firm and the words "CGCC Student Information System" The title page must contain a statement verifying your compliance with Minimum System Requirements, College's Goals and Objectives and Scope of Required Services. The original proposal shall bear the original signature of a representative of the Proposer who is authorized to bind the proposal in contractual matters. Please identify the original copy with the printed words "Original Copy" on this page.

Table of Contents

The proposal response must use a clearly defined section outlining the contents with easily accessible links to each section for easy navigation included within the response in its entirety.

Organization

Company Profile

Background. Proposer's profile information shall include information that accurately and adequately describes your business, including, but not limited to, number of years in business, number of customers, location of customer facilities, number of system contractor offices in Oregon, contact information, financial solvency, company vision statement, and a succinct history of your company with number of current employees, along with full product roadmap for the next 5 years.

Case Histories as Examples of Relevant Experience and References

Proposers shall provide three (3) case histories from customers for whom they have or are currently providing a similar service. Proposers shall provide a contact name for the customer, phone number and/or email address, a description of the service provided, and how many days from the start of the project to final acceptance of the system.

References from customers with similar use requirements, including rural/urban settings and remote secondary sites.

Partnerships and Outsourced Functions

Proposers shall describe the relationship with any secondary consultants or partners needed for the delivery of services, maintenance, and support to be provided by the secondary consultant/partner, the duration of the relationship and a summary of past projects completed together.

Company Ownership / Financials

The success of the implementation of the College depends in part on the ongoing business and viability of the System Contractor. Proposers shall demonstrate that their company and any partner or consultant is financially stable. If the Proposer is a publicly traded company, they shall provide their latest annual report. If the Proposer is privately held, they shall provide a history of their company and discuss specific financial indicators that exhibit financial stability and earnings growth.

Proposer shall provide a detailed description of the contractual obligations required to support the software of the system by the vendor for a (minimum of 5 years) predetermined number of years beyond the enactment of the company being sold or announcement of the product reaching its "end-of-life" status.

Proposer Position

Proposers shall provide information as to how well they are positioned within their industry, relative to their competitors, in order to provide the required product/service.

Proposer Disclosure

Proposers shall disclose any significant litigation, legal matters, or other financial matters in which they are currently involved that could influence or affect the successful implementation of the System and any production liability or other similar litigation related to the System. Any litigation that commences subsequent to the Proposer's response shall be disclosed promptly to the College.

Proposer Third-Party Servicer SOC Reporting and Oversight

In order to resolve prior issues with oversight of third-party servicers performing Title IV reconciliations, the SIS must ensure that the college can independently access, review, and document reconciliation results without depending on the vendor to produce them on request. When the college relies on a third party to perform compliance functions, it remains responsible for those functions under 2 CFR 200.303 and must be able to demonstrate that it actively reviews the servicer's work. The college has experienced a gap between the existence of these reconciliation processes and its ability to evidence its own review of them. Refer to the Transaction Export Requirements section for additional details.

Product Delivery Methodology / Implementation

Proposers shall outline the approach to staging and provide a high-level project plan with a timeline from kickoff to closure. Identify necessary and desirable tasks that will be used in implementation including the normal length of implementation for their products/services, their methodology and the resources required from the College and Proposer during the implementation, plus their roles. Best practices for system deployment need to be followed including a test deployment cycle with user validation testing prior to scheduled production maintenance updates.

Go-Live Readiness and Remedies

The college, not the vendor, will determine when the system is ready for go-live. If the system is not ready by the agreed implementation date, the vendor must provide a remediation plan at no additional cost. Milestone payments will be withheld until each milestone is accepted in writing by the college's Contract Administrator.

Description of the System

Proposers are to provide a description and diagram of the proposed system(s).

Data Access to Legacy Data

CGCC currently operates on Anthology CampusNexus Student and has done so for several years. The college requires that all relevant historical student data be migrated to the new SIS and remain accessible to authorized staff. Proposers must describe in detail how they will address legacy data, including:

- What student data can be imported from Anthology CampusNexus Student, and in what format. Proposers must identify any data types or record categories they cannot migrate and explain how those records will remain accessible.

- Their experience migrating data from Anthology CampusNexus Student specifically, including any known limitations or data quality issues common to that platform.
- How historical financial records, academic records, and financial aid records will be preserved and accessible in the new system, including records needed for federal audit purposes.
- How duplicate or inconsistent records will be identified and resolved during migration, and what role CGCC staff will play in that process.
- What the parallel running period will look like — how long both systems will operate simultaneously, who is responsible for keeping data in sync during that period, and what triggers the final cutover.
- How data will be validated after migration, including what reports or reconciliation tools will be available to confirm completeness and accuracy before the legacy system is decommissioned.
- What happens to data that cannot be automatically migrated — whether it will be manually entered, archived in a readable format, or handled another way.

The college will not decommission its legacy system until it has confirmed to its satisfaction that all required data has been successfully migrated and is accessible in the new system. Proposers must include migration in their project plan and cost proposal.

Training

Describe the training needed for staff (both technical and non-technical), as well as the duration of on-site training. Provide examples of your training materials. Provide a training plan identifying the minimum number of training hours that will be provided as a part of the base package. The plan shall identify the actual training hours and describe the size of and the assumed skill levels of each group. The Proposer shall provide cost information for additional training that is available. Provide cost totals in the Cost Proposal also.

Testing

Provide an explanation of how you will provide the Acceptance Testing during the Project, along with any specific information requested in the Scope of Required Services. Explanations shall be at a sufficient level of detail to enable the College to determine whether the proposed Acceptance Testing will meet the requirements listed in the Scope of Required Services. All pricing information for services and products related to Acceptance Testing must be contained in the Cost Proposal.

General System Acceptance Requirements

Describe how you will provide the General System Acceptance Requirements as listed in Scope of Required Services and how the proposed System will comply with these requirements.

Installation Acceptance Test

Describe how you will provide the Installation Acceptance Test services as specified in the Scope of Required Services and how the proposed System will meet these requirements.

Functional Acceptance Test

Describe how you will conduct functional acceptance testing to confirm that all requirements in the Scope of Services are met prior to go-live. The college will not accept the system as complete until it has verified to its satisfaction that all required functions operate as specified.

Data Configuration Acceptance Test

Describe how you will provide the Data Configuration Acceptance Test services as specified in the Scope of Required Services and how the proposed System will support this Acceptance Test. Proposers must also describe how migrated data will be validated prior to go-live.

Throughput and Projected Load Acceptance Test

Describe how you will provide the Throughput and Projected Load Acceptance Test services as specified in the Scope of Required Services and how the proposed System will support this Acceptance Test.

Reliability Acceptance Test

Describe how you will provide the Reliability Acceptance Test services as specified in the Scope of Required Services and how the proposed system will meet this Acceptance Test.

Maintenance

The proposer should include a detailed description of their Service Level Agreement (SLA) with the different levels of maintenance, the time frame in which support will be provided to the College, whether support is US-based, and the escalation path for unresolved issues. Proposer shall certify that the system is compliant with future database and operating system versions as they are released. Proposer shall provide a schedule of all standard

maintenance windows and outages for upgrades or other planned service interruptions. Proposer must also describe training availability for new staff hired after go-live and how customers are supported when the system is updated.

Cost Proposal

The proposer shall include an itemized pricing proposal for a Student Information System capable of meeting or exceeding the capabilities as outlined in the Scope of Required Services, clearly identifying the costs of implementation and configuration, data migration, integrations, training, and annual maintenance and support. Proposers must explicitly identify any functionality described in this RFP that is not included in the base price and is available only as a separately priced module or add-on. Evaluations will be based on total five-year cost. Ongoing pricing terms beyond year five must also be disclosed.

Proposers are to complete Appendix C Cost Proposal Form.

Acceptance of Proposal Content

Public Records and Confidentiality of Proposal

This RFP and one copy of each original response received, together with copies of all documents pertaining to the selection of the System Contractor and a copy of the executed agreement, shall be kept by the College for a period of five (5) years and shall be made a part of a file or record which shall be open to public inspection.

Public Records

By submitting a proposal, the Proposer(s) acknowledges that information submitted in response to this RFP is open to public inspection under the Oregon Public Records Law, ORS 192.410 through 192.505. The Proposer(s) are responsible for becoming familiar with and understanding the provisions of the Public Records Law.

Note: Under no circumstances will any proposal information be disclosed by the College prior to receiving a written recommendation to award from the College's Contract Administrator.

Thereafter, all Proposals will be available for public inspection by submitting a Public Records Request through the College's President's Office.

Execution of the Proposal

Proposer/Authorized Signer

The proposal shall be executed in the name of the Proposer(s) followed by the signature of the officer authorized to sign and the printed or typewritten designation of the office held.

Partnership Proposer/Authorized Signer

If the proposal is made by a partnership, it shall be executed in the name of the partnership followed by the signature of an authorized partner.

Limited Liability Company (LLC) Proposer/Authorized Signers

If the proposal is made by a Limited Liability Company (LLC), it shall be executed in the name of the LLC followed by the signature of the member(s) or manager(s) authorized to sign for the LLC and the printed or typewritten designation of the office held in the LLC.

Corporation Proposer/Authorized Signer

If the proposal is made by a corporation, it shall be executed in the name of the corporation followed by the signature of the officer authorized to sign for the corporation and the printed or typewritten designation of the office held by the signer in the corporation.

Joint Venture/Authorized Signer

If the proposal is made by a joint venture, it shall be executed by each participant of the joint venture.

Withdrawal of Proposals

Proposer(s) may withdraw its proposal, by written notice submitted on the Proposer's letterhead, signed by the Proposer's authorized representative, delivered to the College. To be effective, the withdrawal must be received prior to the RFP closing date and time. The Proposer or Proposer's authorized representative may withdraw their proposal by providing the Contracts and Procurement Manager prior to the RFP closing date and time, with presentation of appropriate identification and evidence of authority to make the withdrawal satisfactory to the Contracts and Procurement Manager. The Proposer(s) shall mark a written request to withdraw its proposal as follows: "Proposal Withdrawal - Student Information System Proposal."

Proposer's Forms

Any additional forms that the Proposer expects to submit to the College later for signature may

not conflict with the intent or specifics of this RFP and, although they will not be evaluated, they must be submitted with your proposal. Any such form must include the contract terms identified in this RFP.

Examples of these forms include, but are not limited to, the following:

- Agreement form(s)
- Supplemental agreement forms
- Ordering forms
- Work order forms
- Software licensing agreements, if applicable

Submission of any such forms shall not be considered a waiver or amendment to any RFP requirement and any proposal conditioned upon acceptance of any such forms shall be considered non-responsive. The College in its sole discretion may approve the form, require modifications, or reject the forms.

Signed Addendum Required with Proposal

In the event it becomes necessary to revise any part of this RFP, the addenda will be posted on OregonBuys. Prospective Proposers are solely responsible for checking OregonBuys to determine whether any Addenda have been issued. The College is not responsible for any explanation, clarification, interpretation, or approval made or given in any manner except by addenda. Addenda, if necessary, will be issued not later than 72 hours before the date set for closing unless the addenda also extends the closing date. A request for change to an addendum must be made not later than the close of the next business day following issuance of the addendum. Proposals received without properly signed addenda may be considered non-responsive and will not be further considered for contract award.

Proposal Selection Process

An RFP committee composed of representatives from the College including all primary functions from Student Services, Business Services, and Instructional, including Information Technology Services, will evaluate the proposals.

The RFP committee will evaluate all complete proposals received by the closing date. The proposal evaluation process will consist of two phases.

- In Phase I, the RFP committee will evaluate the written proposals. Top scoring proposals will move on to the second phase. Maximum of 4 proposals will move to Phase II.
- Phase II will consist of application demonstrations and a combination of customer reference checks and site visits.

The College will provide the proposer with a list of scenarios to be performed as part of the product demonstration. The RFP committee will score the demonstration based on the

overall proposed product and how well the product performs under the College provided scenarios.

Phase 1 - Evaluation Criteria

The following criteria is required, exclusion may disqualify proposer submission

- **Student Privacy (FERPA):** Systems must enforce the Family Educational Rights and Privacy Act, which protects the privacy of student education records and mandates that institutions obtain prior written consent before releasing personally identifiable information (PII) to third parties.
- **Records Retention (OAR 166-450 & OAR 589-004):** Permanent academic records—such as subjects taken, credits earned, and entry/withdrawal dates—must be retained in a secure manner that prevents accidental destruction or intentional tampering.
- **Social Security Numbers:** Under Oregon Administrative Rules for Student Records, colleges can only request and retain a student's SSN on their permanent record if the student explicitly agrees.
- **Vendor and Ed-Tech Contracts:** Under the Oregon Student Information Protection Act, any vendor contracts tied to the SIS must prohibit the provider from using covered student information for purposes outside of their contracted duties.
- **Title IV Disbursement Controls:** The system must demonstrate the ability to track all Title IV disbursements from issuance through confirmation of receipt, monitor outstanding disbursements against federal return deadlines, and alert staff when action is required.
- **Electronic Disbursement (ACH):** The system must support ACH/direct deposit as the primary method for disbursing financial aid refunds and other student payments. Vendors must describe how they encourage or require students to enroll in direct deposit and how the system handles students who have not enrolled.

The initial evaluation criteria to move to phase II of this RFP is as follows:

Evaluation Criteria	Points
Project Plan and Sample Schedule	15
Technical Proposal and Approach	20
Functional Requirements	100
Implementation, Testing, Training	25
Legacy Data Access	20
Pricing	25

References and Site Visits	25
Experience	20
Total Phase I Evaluation Points	250

Phase 2 - Demonstrations

The scoring process for the Student Information System (SIS) Phase 2 demonstrations is designed to be a weighted assessment that ensures the selected vendor aligns with Columbia Gorge Community College's (CGCC) operations. The evaluation begins with a broad note of each expectation for product operation, revision, and transition.

This is followed by core functional scoring related to product operation, which accounts for 60% of the total grade and measures the system's ability to handle critical college functions such as curriculum management, automated admissions, and federal compliance while the product is being used. The weighted values under each line of Product Operation account for the total 60% score.

Technical and performance attributes are then assessed through product revision and transition scoring, representing 20% of the grade, with a focus on usability, system efficiency, and the ease of interoperability with existing tools like Global Financial Services, Moodle, and Microsoft Entra ID.

Finally, the committee will provide overall qualitative feedback, capturing critical observations on the user interface, identifying potential gaps in workflow, and documenting key strengths that may not be fully reflected in the numerical data accounting for 20% of the overall grade.

Category	Criteria	Requirement
Product Operation	Correctness/Efficiency	Satisfies all functional areas and reduces data loading/entry time.
	Usability	The effort required to learn and operate the software; intuitive faculty/student portals.

Product Revision	Flexibility	Ease of adjusting workflows, such as updating state-specific reporting rules.
Product Transition	Interoperability	The effort required to export data and share it with 3rd party entities (Moodle, Clearinghouse).
	Reusability	Ability to migrate and reuse data currently stored in Campus Nexus.

Product Operation: Core Functional Scoring (60% of Total Grade)

Category	High-Level Function & Requirement	Score (1-5)	Weight	Weighted Score
Foundation	Curriculum & Assessment: Ability to enforce prerequisite/co-requisite logic and manage "Academic Journey" templates.		20%	
Entry	Admissions: Automated application intake with legitimacy checks and %-based "Fuzzy Match" deduplication.		15%	

Specialized	Pre-College & Comm Ed: Support for non-credit registration and flexible "late-start" enrollment (GED/ESOL).		5%	
Integration	Identity & LMS: Real-time sync with Microsoft Entra ID and automated Moodle course/roster provisioning.		10%	
Support	Advising & Learning Commons: Case management/ticketing system and visual task progress trackers for students.		10%	
Compliance	Federal & State Reporting: Built-in R2T4 and SAP calculations and automated Clearinghouse/NSLDS file generation, and monitoring of Title IV disbursements including outstanding check tracking and return-to-ED deadlines.		20%	
Financial	Student Financial Services: Complete student accounts receivable function including charge posting, payment processing, electronic disbursement of financial aid funds to students via ACH/Direct Deposit, fund source and agency billing, ERP transaction export with		10%	

	GL coding, and federal financial aid disbursement controls.			
Customer Use	Student Portal: Ability for students to use a portal for getting information, course registration, and paying student tuition and fees.		10%	
TOTAL			100%	

Product Revision & Transition (20% of Total Grade)

Rate the software's performance and technical architecture.

Category	High-Level Function & Requirement	Score (1-5)	Weight	Weighted Score
Product Revision	Flexibility: Ease of adjusting workflows, such as updating state-specific reporting rules and triggering automated functions within the system.		35%	
Product Transition	Interoperability: The effort required to add additional 3rd party systems to integrate with the SIS. Clear and easy to use 2-way APIs.		35%	
	Reusability: Ability to migrate and reuse data currently stored in Campus Nexus and export data		30%	

	from the system into 3rd-party solutions through non-API methods. Data export is easy and transparent to the end user.			
TOTAL			100%	

Qualitative Feedback & Final Recommendation (20% of Total Grade)

- **Key Strengths:** (e.g., "The fuzzy match logic for hyphenated names was superior")

-
- **Critical Gaps/Concerns:** (e.g., "Manual steps still required for R2T4")

-
- **User Interface Notes:** (Visual noise level, ease of finding data)
-

Overall Recommendation (Select One):

1. Highly Recommended | 2. Recommended with Reservations | 3. Not Recommended

Expectations and agendas for the demonstration phase will be communicated by the College once the top proposers are identified. In addition to demonstrating the full product, expectations will include proposers demonstrating specific scenarios provided by the College. The top three proposers will provide on-site demonstrations for the RFP Committee.

Customer Reference Checks and Site Visits

The top proposers will be asked to supply a list of all sites that are using the proposed system. Indicate if the site is a university or a community college. The evaluation team may contact and/or visit one or more sites from each proposer to further evaluate the proposal from the perspective of a live operating environment, customer service experience, and overall user satisfaction.

CONTRACT TERMS AND CONDITIONS

General

Invoicing

Invoices will be submitted to the Contract Administrator on a milestone basis for services rendered. The Contract Administrator will ensure, upon receipt of invoices, that the services billed are accurate and adhere to the contract terms. The Proposer will negotiate a milestone-based payment schedule with the College and will invoice according to the mutually agreed upon payment schedule.

Right to Audit

The System Contractor shall maintain financial records and other records as may be prescribed by the College or by applicable federal and state laws, rules, and regulations. The System Contractor shall retain these records for a period of five (5) years after final payment, or until they are audited by the College, whichever event occurs first. These records shall be made available during the term of the contracts and the subsequent 5-year period for examination, excerpts, transcription, and audit by the College, its designees, or other authorized bodies.

Termination for Lack of Appropriations

The College may terminate all or portions of this contract for lack of funds if the System Contractor is notified by certified mail thirty (30) calendar days in advance.

Debarment of Proposer

The Contracts and Procurement Manager may debar prospective Proposers from consideration for contracts for a period of not more than 3 years if:

- The prospective Proposer has been convicted of a criminal offense as an incident in obtaining or attempting to obtain a public or private contractor subcontract or in the performance of such contract or subcontract.
- The prospective Proposer has been convicted under state or federal statutes of embezzlement, theft, forgery, bribery, falsification, or destruction of records, receiving stolen property or any other offense indicating a lack of business integrity or business honesty that currently, seriously, and directly affects the prospective Proposer's responsibility as a contractor.
- The prospective Proposer has been convicted under state or federal antitrust statutes.
- The prospective Proposer has committed a violation of a contract provision that is regarded by the Contracts and Procurement Manager or the Construction Contractors Board to be so serious as to justify debarment. A violation may include but is not limited to a failure to fulfil the terms of a contract or an unsatisfactory performance in accordance with the terms of the contract. A failure to perform or an unsatisfactory performance caused by acts beyond the control of the contractor may not be considered to be a basis for debarment.
- The prospective Proposer does not carry any insurance required by applicable law.
- The Contracts and Procurement Manager shall give written notice of the reasons for the debarment and the proposed length of debarment to the person for whom debarment is being considered. The Proposer shall be given not less than fourteen (14) days to respond to the Contracts and Procurement Manager in writing. The Contracts and Procurement Manager shall issue a written decision that states the reason for the action taken and that informs the Proposer of the Proposer's appeal rights.

Laws of the State of Oregon

By submitting a proposal in response to this RFP, Proposer agrees that, any terms and conditions stated within any agreement that is awarded because of this solicitation shall also include the following laws of the State of Oregon are hereby incorporated by reference into the contract: ORS 279B.220, 279B.230 and 279B.235.

Any contract awarded and/or purchase order issued because of this solicitation shall be governed by the laws of the State of Oregon without regard to conflict of laws principles. Exclusive venue for litigation of any action arising under the contract shall be in the Circuit Court of the State of Oregon for Wasco County unless exclusive jurisdiction is in federal court, in which case exclusive venue shall be in the federal district court for the district of Oregon. Each party expressly waives all rights to maintain an action under this contract in any other venue, and expressly consents that, upon motion of the other party, any case may be dismissed, or its venue transferred, as appropriate, to effectuate this choice of venue.

Successful Proposer's Compliance with Tax Laws

Successful Proposer represents and warrants to the College that:

1. Successful Proposer shall, throughout the term of this Agreement, including any extensions hereof, comply with:
 - a. All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318.
 - b. Any tax provisions imposed by a political subdivision of the State of Oregon applicable to successful Proposer.
 - c. Any rules, regulations, charter provisions, or ordinances that implement or enforce any of the foregoing tax laws or provisions.
2. If applicable, the successful Proposer, for a period of at least six (6) calendar years preceding the Effective Date of this Agreement, has faithfully complied with:
 - a. All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318.
 - b. Any tax provisions imposed by a political subdivision of the State of Oregon applicable to successful Proposer.
 - c. Any rules, regulations, charter provisions, or ordinances that implement or enforce any of the foregoing tax laws or provisions.

Successful Proposer's failure to comply with the tax laws of the State of Oregon and all applicable tax laws of any political subdivision of the State of Oregon shall constitute a material breach of this Agreement. Further, any violation of successful Proposer's warranty, as set forth in this Article, shall constitute a material breach of this Agreement. Any material breach of this Agreement shall entitle the College to terminate this Agreement and to seek damages and any other relief available under this Agreement, at law, or in equity.

Any Work delivered to the College under this Agreement shall be provided to the College free and clear of all restrictions on or conditions of its use, transfer, modification, or assignment, and shall be free and clear of all liens, claims, mortgages, security interests, liabilities, charges, and encumbrances of any kind.

Pay Equity Compliance

As required by ORS 279B.235, successful Proposer shall comply with ORS 652.220 and shall not discriminate against any of successful Proposer's employees in the payment of wages or other compensation for work of comparable character, the performance of which requires comparable skills, or pay any employee at a rate less than another for comparable work, based on an employee's membership in a protected class.

The successful Proposer must comply with ORS 652.220 as amended and shall not unlawfully discriminate against any of the successful Proposer's employees in the payment of wages or other compensation for work of comparable character based on an employee's membership in a protected class. "Protected class" means a group of persons distinguished by race, color, religion, sex, sexual orientation, national origin, marital status, veteran status, disability, or age. Successful Proposer's compliance with this section constitutes a material element of this

Agreement and a failure to comply constitutes a breach that entitles the College to terminate this Agreement for cause. Successful Proposer may not prohibit any of successful Proposer's employees from discussing the employee's rate of wage, salary, benefits, or other compensation with another employee or another person. Successful Proposer may not retaliate against an employee who discusses the employee's rate of wage, salary, benefits, or other compensation with another employee or another person.

Contract Award

Offer Evaluation/Award and Right to Reject all Proposals

The College will be the sole judge in determining the award of any contract pursuant to this RFP and reserves the right to cancel this procurement or to reject any or all proposals in accordance with ORS 279B.100.

Negotiations with any Proposer(s)

The College reserves the right to:

- Accept a proposal and subsequent offers for contract from any Proposer, even if the proposal is not the lowest cost.
- Waive any immaterial defects and irregularities in proposals and to waive or modify any irregularities in proposals received, after prior notification to the Proposer(s).
- In determining the most responsive proposal(s), take into consideration any or all information supplied by the Proposer(s) in the proposal and the College's investigation into the experience of the Proposer(s).
- In addition, the College may accept or reject proposals based on minor variations from the stated scope of required services when such action is deemed to be in the College's best interest.
- Negotiate a final scope and price with the selected Proposer(s) that may differ in some respects from this RFP.
- To seek clarifications of each proposal.
- If the Proposer(s) chooses to participate in negotiations, they may be asked to submit additional information, or other revisions to their proposals as may be required.
- Consider proposal modifications received at any time before the award is made, if such an action is in the best interest of the College.
- To negotiate a final contract that is in the best interest of the College. The System Contractor(s) shall commence services only after a contract or agreement with the College is fully executed and the College has issued a "Notice to Proceed."

Contract Administrator

The College's Contract Administrator for the services to be procured with this RFP will be the College President.

Non-Assignment

If a contract is awarded, it shall not be assigned, nor duties be delegated, in part or in total without the consent of the College. Reasonable requests for assignment of the contract may be granted based on the sole determination of the College.

Form of Procurement Contract

Any procurement contract that is awarded as a result of this RFP shall incorporate the RFP document, the System Contractor's written proposal, any required certificates, and all other documents incorporated by reference therein.

It is the College's intent to award a contract in substantially the form of the contract attached as Appendix B. Proposer may submit an alternative contract for the College's review. The College, at its sole determination, may approve the Proposer's offered contract as is, require modifications, or reject the Proposer's contract and require that the College's contracts be executed for the purpose of this procurement.

A Proposer may not condition its proposal on execution of any contract it submits. Any such condition shall result in rejection of their proposal.

Any additional contracts shall contain the following provisions:

- The following laws of the State of Oregon are hereby incorporated by reference into the agreement: ORS 279B.220, 279B.230 and 279B.235.

Each party expressly waives all rights to maintain an action under this contract in any other venue, and expressly consents that, upon motion of the other party, any case may be dismissed, or its venue transferred, as appropriate, to effectuate this choice of venue.

No person shall be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity on the grounds of race, religion, national origin, sex, marital status, familial status or domestic partnership, age, mental or physical disability, sexual orientation, gender identity or source of income as provided Further, System Contractor agrees not to discriminate against disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran own's or an emerging small business certified under ORS 200.055 in awarding subcontracts as required by ORS 279A.110.

System Contractor shall obtain and maintain during the term of this contract, a policy or policies of liability insurance including commercial general liability insurance with a combined single limit, or the equivalent, of not less than \$2,000,000 (two million dollars) for each occurrence for Bodily Injury and Property Damage.

The insurance required in this section shall include the following coverage:

- Comprehensive General or Commercial General Liability, including personal injury, contractual liability, and products/completed operations coverage.
- Cyber liability
- Automobile

Each policy of such insurance shall be on an "occurrence" and not a "claims made" form, and shall:

- Name as additional insured "Columbia Gorge Community College, its officers, agents and employees" with respect to claims arising out of Provider's Work under this contract.
- Apply to each named and additional named insured as though a separate policy had been issued to each, provided that the policy limits shall not be increased thereby.
- Apply as primary non-contributory coverage for each additional named insured except to the extent that two or more such policies are intended to "layer" coverage and, taken together, they provide total coverage from the first dollar of liability.
- System Contractor shall immediately notify the College of any change in insurance coverage.
- System Contractor shall supply an endorsement naming the College, its officers, employees, and agents as additional insureds within sixty (60) days of the Effective Date of the contract.
- Be evidenced by a certificate or certificates of such insurance approved by the College.

All subject employers working under this contract are either employers that will comply with ORS 656.017 or employers that are exempt under ORS 656.126.

System Contractor's Compliance with Tax Laws

System Contractor represents and warrants to the College that:

- System Contractor shall, throughout the term of this contract, including any extensions hereof, comply with:
 - All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318.
 - Any tax provisions imposed by a political subdivision of the State of Oregon applicable to System Contractor.
 - Any rules, regulations, charter provisions, or ordinances that implement or enforce any of the foregoing tax laws or provisions.
- System Contractor, for a period of at least six (6) calendar years preceding the Effective Date of this contract, has faithfully complied with:
 - All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318.
 - Any tax provisions imposed by a political subdivision of the State of Oregon applicable to System Contractor.
 - Any rules, regulations, charter provisions, or ordinances that implement or enforce any of the foregoing tax laws or provisions.

System Contractor's failure to comply with the tax laws of the State of Oregon and all applicable

tax laws of any political subdivision of the State of Oregon shall constitute a material breach of this contract. Further, any violation of System Contractor's warranty, as set forth in this section, shall constitute a material breach of this contract.

Any material breach of this contract shall entitle the College to terminate this contract and to seek damages and any other relief available under this contract, at law, or in equity. Any Work delivered to the College under this contract shall be provided to the College free and clear of all restrictions on or conditions of its use, transfer, modification, or assignment, and shall be free and clear of all liens, claims, mortgages, security interests, liabilities, charges, and encumbrances of any kind.

Cooperative Procurement

This procurement is being conducted on behalf of Columbia Gorge Community College (CGCC) in accordance with the provisions of Oregon Public Procurement Code.

If approved by the Contractor, the contract resulting from this procurement may be used by other public bodies to purchase at contract prices and in accordance with the contract terms. The Contractor shall deal directly with any public body it approves to use the contract. Failure to extend a contract to another public body will have no effect on consideration of Contractor's bid/proposal.

With the approval of the Contractor, any public body using the resultant contract has the option of executing a separate contract with the Contractor to add terms and conditions required by statute, ordinances, or regulations, or to remove terms and conditions which conflict with its governing statutes, ordinances, or regulations.

Columbia Gorge Community College, its officials and staff are not responsible for placement of orders, invoicing, payments, contractual disputes, or any other transactions between the Contractor and any other public bodies, and in no event, shall the College, its officials or staff be responsible for any costs, damages or injury resulting to any party from use of a College contract. If, when preparing such a contract, the additional terms and conditions of a public body seeking to purchase pursuant to cooperative procurement are unacceptable to the Contractor, the Contractor may withdraw its consent to extension of the contract to that public body. Columbia Gorge Community College assumes no responsibility for any notification of the availability of the contract for use by other public bodies, but the Contractor may carry out such notification.

Definitions

"Project" means the procurement, configuration, implementation, data migration, and long-term support required to completely replace the college's existing Student Information System with a modern, fully integrated solution capable of meeting the requirements described in this RFP.

“System” means the single, fully integrated (commercially available off the shelf software natively integrated as a single system) Student Information System (see requirements for details) that enables data sharing among, and records retention for, Columbia Gorge Community College and all its partner agencies.

“System Contractor” means the successful proposer that is awarded the contract pursuant to this RFP.

“Technical Architecture” means a system specification containing the design, functionality, organization, and implementation of the system consisting of narrative and visual representation.

“Users” means College Staff of Columbia Gorge Community College and all its partner agencies.

Human Rights

It is the express belief of the College that no person shall be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity on the grounds of race, religion, color, national origin, sex, marital status, familial status or domestic partnership, age, mental or physical disability, sexual orientation, gender identity or source of income as provided by federal non-discrimination laws. System Contractor agrees to comply with all applicable requirements of federal, state, and local civil rights and rehabilitation statutes, rules and regulations if awarded a contract by the College.

No person shall be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity on the grounds of race, religion, color, national origin, sex, marital status, familial status or domestic partnership, age, mental or physical disability, sexual orientation, gender identity or source of income as provided. Further, System Contractor agrees not to discriminate against disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns, or an emerging small business certified under ORS 200.055 in awarding subcontracts as required by ORS 279A.110.

Solicitations for Subcontracts, Including Procurements of Materials and Equipment

In all solicitations either by competitive bidding or negotiation made by the System Contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by the System Contractor of the System Contractor's obligations under this contract.

Discrimination in Subcontracting Prohibited

Proposer agrees not to discriminate against disadvantaged business enterprise, a minority

owned business, a woman-owned business, a business that a service-disabled veteran owned, or an emerging small business certified under ORS 200.055 in awarding subcontracts as required by ORS 279A.110.

Scope of Services

Columbia Gorge Community College (CGCC) has been evaluating its needs in the Student Information System (SIS) space for several months. We have reached the point of requesting those companies capable of supporting the unique needs of Columbia Gorge Community College (CGCC) and would like to invite you to present your SIS. This RFP process will help our stakeholders prioritize the "Must-Have" features necessary to modernize our faculty, staff, and student experience.

CGCC currently operates on **Anthology Campus Nexus Student**. While it has served the college for years, the institution is seeking to address significant friction points:

- **Manual Heavy Lifting:** Excessive reliance on "shadow systems," including Google Sheets and Excel, to track applications and student data.
- **Integration Gaps:** Lack of real-time synchronization with Moodle (LMS) and Microsoft Entra ID, causing "Sign-In Loops" and manual roster management.
- **User Interface:** A non-intuitive interface with high "visual noise" that requires too many clicks and repetitive Student ID entries for simple tasks.
- **Data Confidence:** Challenges with reporting accuracy and the need for manual "cleanup" of Excel exports for state and federal compliance.

Primary Functions for Review

The following categories outline the high-level functions of the college. Vendors are requested to demonstrate how their solution addresses these specific functional and non-functional requirements.

Foundation: Curriculum & Assessment

- **Academic Journey Templates:** Provide a "plug-and-play" program or pathway (major) template that outlines all required credits for a student.
- **Catalog-Driven Logic:** Automatically determine total credits and graduation requirements based on the course catalog and year.
- **Prerequisite/Co-requisite Enforcement:** Track and enforce complex logic for individual courses and course groups during registration.

- **Learning Outcomes:** Integrate Course Learning Outcomes (CLO) and Institutional Learning Outcomes (ILO) into the grading or assessment process.

Entry: Open & Limited Admissions

- **Automated Application Intake:** Replace manual Google Sheet reviews with automated evaluation and legitimacy checks (IP, address, and phone number validation).
- **Duplicate Detection:** Utilize "Fuzzy Match" logic and percentage-based matching to identify existing student accounts, even with inconsistent hyphenated names.
- **Flexible Status Management:** Seamlessly handle transitions between "Prospect," "Applicant," "Cleared to Register," and "Active Student"; include potential student status functionalities not mentioned here to capture additional functions of the system.
- **Limited-Entry Support:** Collect and track sensitive data for programs like Nursing, including program-specific GPAs and immunization records.

Specialized: Pre-College & Community Education

- **Flexible Registration Timelines:** Support "late-start" enrollment (up to two weeks post-term) for GED and ESOL populations.
- **Non-Credit Agility:** Allow for streamlined demographic collection and immediate payment for Community Ed without requiring a full academic transcript.
- **College Now (High School) Tracking:** Capture high school locations, assigned teachers, and parent/guardian permission forms for dual-enrollment students. Demonstrate how the college now population interacts with the system, including partner schools.

Integration: LMS & Identity Management

- **"Silent" LMS Integration:** Real-time synchronization with Moodle to provision course shells and push student rosters automatically.
- **Single Sign-On (SSO):** Configure for SSO using Microsoft Entra ID as the primary identity provider to prevent access issues, including seamless integration of information updates based on student account changes in the SIS.
- **Automated Provisioning:** Automatically disable access to Moodle and other services when a student's status changes to "Withdrawn" or "Completed".

Support: Learning Commons, Advising, & Library

- **Case Management & Ticketing:** A built-in system to track all interactions with advising, counseling, and career services.

- **Task Progress Tracker:** A visual checklist for students, advisors, and the registrar to monitor outstanding tasks or milestones.
- **Resource Accountability:** Track high-value technology loans (laptops, hotspots) and automatically place financial holds for non-returned items and have the ability to turn this off for key scenarios.

Compliance: Federal & State Reporting

- **Financial Aid Processing:** Integrate with 3rd party tools via API for ISIR data exchange and Title IV compliance.
- **Automated Calculations:** Perform Return of Title IV (R2T4) calculations and monitor Satisfactory Academic Progress (SAP).
- **Standardized Reporting:** Generate enrollment and degree reporting files for the National Student Clearinghouse and NSLDS directly from the SIS.

Detailed System Requirements

Functional/Feature Requirements						
Finalized, Monday, June 08, 2026						
ID		Objective		Value		Stakeholder
F 1 RI D	I wan t to	Automate the intake and evaluation of student applications	so that	the application process is more automated in the new system and manual review in a Google Sheet is replaced.		Student Services, Administrator
F 2 RI D	I wan t to	Automatically check for an existing student account by matching key fields like Date of Birth, first name, last name, phone number, and social security #	so that	the current manual check by Student Services is eliminated and duplicate accounts are not created.		Student Services

F 3 RI D	I wan t to	Automatically update an existing student account when a match is found during the application process	so that	the existing student's information is updated instead of creating a new account.	Student Services
F 4 RI D	I wan t to	Implement an automated or semi-automated legitimacy check using factors like IP address, physical address, and phone number to flag suspicious applications	so that	applications deemed suspicious are marked as "fake" and disregarded.	Student Services
F 5 RI D	I wan t to	Establish integration with an address validation utility	so that	the provided application information can be validated against a large repository.	Student Services, Administrator
F 6 RI D	I wan t to	Use a percentage-based matching system to identify accounts with partial or positive matches	so that	potential duplicate accounts, including those with inconsistent hyphenated names, can be caught.	Student Services
F 7 RI D	I wan t to	Automatically assign the correct initial student status (e.g., "Degree-Seeking" or "Non-Degree-Seeking") based on the application data (e.g., selected program of study)	so that	all types of students can be properly managed within the system.	Student Services
F 8 RI D	I wan t to	Automatically trigger the correct account creation workflow when a student's enrollment status changes	so that	information is pushed to systems like Microsoft Entra ID without manual intervention.	Student Services, IT Services
F 9 RI D	I wan t to	Automatically append a suffix (e.g., "1") to the end of a new student's username if their name already exists in the system	so that	the system can manage new student accounts with name conflicts.	IT Services
F 10 RI	I wan	Automate the communication of student portal account	so that	the student can log in to the student portal and begin the	IT Services, Advising

D		t to	information (login credentials) to the student via email or through their advisor		next steps.	
F RI D	11	I wan t to	Automate sending the student portal password prior to the advising meeting	so that	students can log in before, during, or after their advising meeting.	Advising
F RI D	12	I wan t to	Provide a task progress tracker that students, advisors, and the registrar can use to check off completed items	so that	stakeholders can be notified when tasks are outstanding or when dependency tasks are completed.	Student, Advisor, Registrar
F RI D	13	I wan t to	Automatically send a reminder notification to students if an advising appointment has not been set up within 7 days of their acceptance	so that	advisors can be notified to reach out to the student in another 7 days if no response is received.	Advising
F RI D	14	I wan t to	Capture and record student housing application information (e.g., request, background check status, security deposit payment, Housing and Dining Agreement status)	so that	Student Services can manage the housing enrollment process.	Student Services
F RI D	15	I wan t to	Provide an administrative function to manually create accounts within systems	so that	Student Services can bypass the automated process when necessary.	Student Services
F RI D	16	I wan t to	Automate the evaluation and application of transfer credits from other institutions	so that	credits are cross-walked to CGCC's course catalog and automatically applied to a student's program of study.	Registrar, Student
F RI D	17	I wan t to	Include a built-in case management or ticketing system to track student	so that	a comprehensive record of all support provided by advising, counseling, and career	Advisor, Student Services

			interactions		services is maintained.	
F RI D	18	I wan t to	Allow advisors/staff to collect and maintain consistent notes and information from the student during advising/meeting sessions	so that	a consistent record is maintained for every communication with the student.	Advisor, Student Services
F RI D	19	I wan t to	Be able to permission the viewing of advising notes to others	so that	only authorized staff can view the confidential student record information.	Advisor, Administrator
F RI D	20	I wan t to	Provide note templates or key phrases for documentation	so that	documentation is easier and more consistent across all staff interactions.	Advisor, Student Services
F RI D	21	I wan t to	Have a clear, plug-and-play program or pathway (major) template built-in	so that	an academic journey that outlines all required credits can be created and built for the student in the SIS.	Advisor, Registrar
F RI D	22	I wan t to	Automatically generate a class roster for faculty once a student is registered for courses	so that	faculty can easily see which students are in their classes.	Instructional Services, Faculty
F RI D	23	I wan t to	Be able to capture the high school/location and teacher assigned for College Now courses	so that	the specific details of the course offering are accurately recorded.	Instructional Services, Registrar
F RI D	24	I wan t to	Enable high school teachers to log into the SIS	so that	they can handle all items related to teaching a course at CGCC, such as gradebook and student-related processes.	Instructional Services, Faculty
F RI D	25	I wan t to	Provide an administrative function for Pre-req overrides and Advising overrides	so that	a "gatekeeping enrollment process" can be utilized to ensure students interact with advisors.	Advisor, Registrar

F 26	RI D	I want to	Generate transcripts that clearly indicate a "W" notation for a student who has "withdrawn after decision"	so that	the academic history is accurately reflected for financial aid and academic records.	Registrar, Financial Aid
F 27	RI D	I want to	Include functionality for Financial Aid (SAP, R2T4) and Degree Audits	so that	the student's academic and financial progress can be tracked and managed.	Financial Aid, Registrar
F 28	RI D	I want to	Integrate with a 3rd party tool for financial aid processing via API	so that	financial aid data can be shared without duplicate data entry, including SSN (optional).	Financial Aid, IT Services
F 29	RI D	I want to	Capture and track the various funding sources (e.g., FAFSA, Disability services, Step benefits, Other benefits) for an applicant	so that	the college can ensure the student has filled out their FAFSA and is utilizing the correct benefits.	Financial Aid, Student Services
F 30	RI D	I want to	Interface with external systems for Housing and Bookstore (Slingshot)	so that	the student's full lifecycle, including housing applications and book purchases, is managed within the system.	Student Services, IT Services
F 31	RI D	I want to	collect and store the student's previous academic history (e.g., high school transcripts, test scores) from the admission application	so that	the student record includes all necessary prior credentials for review and verification	Student Services, Advisor
F 32	RI D	I want to	capture and store standardized demographic data (e.g., pronouns, gender, first generation status)	so that	the college can provide accurate institutional reporting	Registrar, Advisor, Student Services
F 33	RI D	I want to	allow students to update their contact information (e.g., address, phone number) via a secure self-service portal	so that	the college maintains current student data without manual intervention from staff	Student, Registrar

F RI D	34	I wan t to	automatically capture and store the student's official enrollment date	so that	the student's lifecycle progress can be accurately monitored and audited	Registrar
F RI D	35	I wan t to	enforce prerequisite logic for individual courses during the student registration process	so that	students only register for courses for which they meet the specified academic preparation	Registrar, Advisor
F RI D	36	I wan t to	enforce co-requisite logic for defined course groups during the student registration process	so that	students are automatically enrolled in mandatory, linked components (e.g., lecture and lab)	Registrar, Advisor
F RI D	37	I wan t to	record and track actual credit hours for degree-applicable courses	so that	compliance with federal financial aid and degree completion requirements is accurately maintained	Registrar, Financial Aid
F RI D	38	I wan t to	provide a secure faculty interface for submitting final grades for all registered students in their courses	so that	academic progress is officially documented and released to the student	Faculty, Instructional Services
F RI D	39	I wan t to	provide a faculty mechanism to officially certify submitted grades	so that	the integrity and finality of all academic records are legally assured	Faculty, Registrar
F RI D	40	I wan t to	record the Last Date of Attendance (LDA) for students who officially withdraw or are administratively withdrawn	so that	accurate tuition refunds and mandatory financial aid adjustments can be calculated	Faculty
F RI D	41	I wan t to	allow students to securely submit a formal opt-out request for the release of their Directory Information	so that	the institution is in full compliance with FERPA notification and opt-out regulations	Student
F RI D	42	I wan t to	automatically generate a time-stamped record of all external disclosures of	so that	FERPA compliance regarding information release is met and easily auditable	Student Services

			student information			
F RI D	43	I wan t to	provide a secure online portal for students to submit official transcript requests	so that	the process for official record requests is accessible and standardized for all students	Student
F RI D	44	I wan t to	issue and manage unique student ID numbers that serve as the primary identifier	so that	student data is securely linked across all institutional systems without relying on sensitive data like SSN	Student Services
F RI D	45	I wan t to	Ensure the SIS is configured for Single Sign-On (SSO) using Microsoft Entra ID (Azure) as the primary identity provider	so that	students and faculty can use their existing, consistent CGCC credentials (provisioned via Entra ID) to access all integrated systems (SIS, Moodle, Zoom, etc.).	IT Services, All Stakeholders
F RI D	46	I wan t to	Maintain real-time or near-real-time synchronization of student account status and attributes with Microsoft Entra ID	so that	data integrity is maintained, preventing "Sign In Loop" errors and ensuring immediate access upon enrollment.	IT Services
F RI D	47	I wan t to	Require the SIS to support a robust API or established data synchronization method (like OneRoster or LIS) for integration with Moodle/OpenLMS	so that	course enrollments, gradebook data, and user profiles are automatically created and updated consistently.	IT Services, Instructional Services
F RI D	48	I wan t to	Implement a secure, automated data provisioning process for student accounts from the SIS → Google Workspace (for email and collaboration) → Microsoft Entra ID (for authentication)	so that	student email accounts are created promptly upon admission and linked to the central Entra ID for authentication.	IT Services
F RI	49	I wan	Ensure all financial aid data exchange with Global FAS uses secure, compliant	so that	student financial data (ISIRs, verification status, award packaging results) is	IT Services, Financial Aid

D		t to	methods (API/SFTP)		accurately and securely exchanged, supporting Title IV compliance.	
F 50	RI	I want to	Ensure the SIS can accommodate new ISIR data elements and processing timelines	so that	the college maintains compliance with evolving federal regulations, such as the FAFSA Simplification Act.	Financial Aid, IT Services
F 51	RI	I want to	Support the use of an external, unique identifier (external primary key) for students, courses, and enrollments in all syncs	so that	the SIS can reliably track and update corresponding records in Moodle.	IT Services
F 52	RI	I want to	Ensure the SIS/Entra ID integration supports Two-Factor Authentication (2FA) and other security policies configured in Entra ID	so that	all users (students, faculty, staff) are protected by a single, strong security layer.	IT Services
F 53	RI	I want to	Provide an automated mechanism to disable student access to the SIS, Moodle, and other integrated services upon status change (e.g., "withdrawn," or "completed")	so that	security is maintained and resources are protected after a student leaves the enrollment lifecycle.	IT Services
F 54	RI	I want to	Require the SIS to support modern web standards and API compatibility (e.g., OAuth 2.0, REST APIs)	so that	future integration with other services like Zoom, the Housing Tool, and other third-party vendors is simplified and secure.	IT Services
F 55	RI	I want to	be able have Electronic Direct Deposit for student refunds and disbursements	so that	Manual check processing is reduced and students receive funds faster	Business Office
F 56	RI	I want to	have Online invoicing and be able to notify students of balances by SMS or Email	so that	Students receive timely, automated notifications of their financial obligations to	Business Office

					ensure prompt payment.	
F 57 RI D	I wan t to	Have a digital student payment portal to be able to review accounts, pay bills, and review student related financials / transactions	so that	Students have a centralized, self-service method to manage their financial obligations	Business Office	
F 58 RI D	I wan t to	be able to have students make payments through the portal	so that	Students have a centralized, self-service method to manage their financial obligations	Business Office	
F 59 RI D	I wan t to	Be able to track scholarship balances for students and notify the business office of those balances	so that	Third-party and foundation funding is accurately applied to student accounts before disbursements.	Business Office	
F 60 RI D	I wan t to	place financial holds	so that	the system automatically prevents the student from registering for future classes or receiving official transcripts until the debt is resolved.	Financial Aid	
F 61 RI D	I wan t to	make manual adjustments	so that	the system Allows Student Accounts staff to manually input or adjust state aid and third-party scholarships that might offset the debt.	Financial Aid, Business Office	
F 62 RI D	I wan t to	be able to perform credit hour audits	so that	the system distinguishes between degree-applicable and non-degree-applicable credits to ensure the collection amount is legally accurate.	Student Services	
F 63 RI D	I wan t to	Enforce a mandatory advising meeting for new, degree-seeking students to obtain "Clear to Register"	so that	To ensure academic decisions are guided and students are enrolled in appropriate courses.	Advising, Student Services	

			status.			
F 64 RI D	I wan t to	Automatically flag a student as "Stalled" if they have enrolled but have no recorded attendance.	so that	To identify students who may need intervention or risk losing financial aid.		Registrar, Advising
F 65 RI D	I wan t to	Perform retroactive prerequisite checks after grades are posted for a new term.	so that	To ensure students who failed a prerequisite are automatically flagged for removal from subsequent courses.		Registrar, IT Services
F 66 RI D	I wan t to	Associate a student's enrollment in a certificate program with the larger degree (AAS) it credits toward.	so that	To ensure students enrolled in certificates (e.g., Airframe) are recognized as part of the broader program (e.g., AAS for AMT).		Registrar, Student
F 67 RI D	I wan t to	Implement "Repeat Course Logic" customizable by CGCC academic policies.	so that	To accurately track first-time vs. repeat courses for GPA and financial aid compliance.		Registrar, Financial Aid
F 68 RI D	I wan t to	Auto-award degrees or certificates based on degree audit completion.	so that	To streamline the graduation process if secondary systems (like Conclusive Advisor) are unavailable.		Registrar
F 69 RI D	I wan t to	Capture and track specific student demographic tags: Veteran, First Generation, and Pronouns.	so that	To comply with standard demographic reporting and support personalized student services.		Student Services
F 70 RI D	I wan t to	Capture and store Parent/Guardian Permission and Sophomore Exception forms for "College Now" students.	so that	To ensure legal and age-based eligibility for high school students earning college credit.		Student Services, Registrar
F 71 RI	I wan	Assign an "unearned F" (FA Grade) for students who unofficially withdraw or	so that	To clearly delineate unofficial withdrawals for R2T4		Faculty, Financial Aid

D		t to	abandon coursework.		calculations.	
F RI D	72	I wan t to	Support a 1-year advance registration window in addition to term-by-term registration.	so that	To allow students to plan their academic year in advance.	Registrar, Student
F RI D	73	I wan t to	Use a process handler to import data from OSAC based on a record layout	so that	State Financial Aid data does not have to be manually inputted	Financial Aid
F RI D	74	I wan t to	share updates of Financial Aid awards with Global through bi-directional API	so that	it will not be necessary to manually update Global when new Institutional, State and Third Party awards are received	Financial Aid, Student Accounts
F RI D	75	I wan t to	establish criteria (rules) for awards to establish fail/safe mechanism	so that	to protect the integrity of the process	Financial Aid , Student Accounts
F RI D	76	I wan t to	Establish a priority order for awards	so that	non-refundable Foundation or Third Party Scholarships are posted prior to Title IV and other refundable forms of aid	Financial Aid, Student Accounts
F RI D	77	I wan t to	have a communication suite that allows us to trigger notices on a student specific basis	so that	we no longer have to use impersonalized canned comments which might be misleading	Financial Aid
F RI D	78	I wan t to	Be able to track a students intent to complete program or transfer to another institution(4-year degree)	so that	we can report on student's intent related to retention at the college	Student, Student Advisor
F RI D	79	I wan t to	have a student transfer portal	so that	the college can track student success through surveys of alumni / transfers from the college	Student, Student Services

F 80 RI D	I wan t to	maintain a configurable charge code table with GL account mappings for every charge type	so that	every transaction exported to the ERP carries the correct fund, account, function, department, and project coding without manual recoding	Business Office / Finance
F 81 RI D	I wan t to	configure tuition rate tables by residency tier and update rates each year without vendor involvement	so that	rate changes are controlled by college staff and do not retroactively affect enrolled students	Business Office / Registrar
F 82 RI D	I wan t to	grant and track fee waivers with an authorization workflow and reason code	so that	waivers are auditable and carry the correct GL offset coding for reporting	Business Office / Financial Aid
F 83 RI D	I wan t to	post in-person payments (cash, check, money order) through a staff cashier interface and generate a receipt	so that	all payments regardless of method are recorded in the student ledger with a full audit trail	Business Office / Cashier
F 84 RI D	I wan t to	produce an end-of-day cash close report summarizing receipts by payment method	so that	staff can reconcile cash drawers and prepare bank deposits without a separate spreadsheet	Business Office / Cashier
F 85 RI D	I wan t to	offer configurable installment payment plans with automatic drafting and failed-payment handling	so that	students can spread tuition payments over a term and business office staff are notified of failures automatically	Business Office / Student Accounts
F 86 RI D	I wan t to	grant an authorized third-party payer (parent, grandparent, employer) their own portal login to view and pay a student's balance	so that	third parties can pay a student bill without needing the student's credentials, and the student controls access in compliance with FERPA	Business Office / Student Accounts
F 87 RI	I wan	designate a fund source on a student account linking their	so that	agency payments are tracked against the GL directly, and	Business Office / Financial Aid

D		t to	charges to an external agency or program		the correct student account and coding flows automatically to ERP	
F 88	RI	I want to	generate an invoice to an external agency or sponsor WorkSource, DVR, tribal programs, employers, and other sponsors and track payment status against that invoice	so that	the college can bill and track unpaid sponsor balances	Business Office / Finance
F 89	RI	I want to	generate a configurable refund schedule that automatically calculates tuition credits when a student drops or withdraws	so that	refund calculations are consistent, auditable, and do not require manual staff computation	Business Office / Registrar
F 90	RI	I want to	produce an AR aging report and generate automated dunning notices to past-due students	so that	the business office can manage collections proactively without maintaining a separate tracking spreadsheet	Business Office / Finance
F 91	RI	I want to	export a collections referral file for accounts meeting defined past-due criteria	so that	the college can refer delinquent accounts to the State of Oregon collection process with a data export rather than a manual list	Business Office / Finance
F 92	RI	I want to	generate IRS Form 1098-T annually from ledger data with support for corrections and e-filing	so that	the college meets its IRS reporting obligation without manually compiling tuition and aid data from separate sources	Business Office / Finance
F 93	RI	I want to	reverse a returned/NSF payment on the student ledger and post a configurable returned-payment fee automatically	So that	returned payments are handled consistently and the student is notified without staff manually tracking bounced transactions	Business Office / Student Accounts

Non-Functional Requirements						
Finalized, Monday, May 25, 2026						
ID		Objective		Value	Stakeholder	
NFRID 1	I want to	Maintain real-time or near-real-time synchronization of student data	so that	Sign In Loop and other errors caused by data mismatches between systems like Anthology and Microsoft Entra ID are prevented.	IT Services	
NFRID 2	I want to	Enforce data validation checks for key fields like first/last names, Date of Birth, SSN (optional), Email, and Academic Program Selection	so that	errors like typos and synchronization issues, which currently rely on manual data entry, are minimized.	Financial Aid, Student Services	
NFRID 3	I want to	Ensure that the SIS can synchronize/interface with Moodle (LMS)	so that	student logins are not difficult due to emails not working at the start of the term.	IT Services	
NFRID 4	I want to	Provide clear, automated alerts to technicians	so that	data mismatches that cause synchronization issues between systems can be quickly identified and troubleshot.	IT Services	
NFRID 5	I want to	Ensure the SIS can support a wide range of student statuses	so that	all student enrollment statuses throughout the lifecycle, including "Degree-Seeking," "Non-Degree-Seeking," and specific statuses like "prospect," "applicant," and "withdrawn" can be managed.	Student Services	

NFRID 6	I want to	Provide an intuitive and user-friendly Faculty Portal	so that	instructors can easily view class rosters, submit grades, and manage attendance without relying on complicated guides.	Faculty
NFRID 7	I want to	Support advanced search capabilities and customizable views (dashboards) for all users (e.g., faculty, advisors, financial aid)	so that	users can find specific student groups and display the most relevant information for their role.	Student Services, Faculty, Students
NFRID 8	I want to	Support the ability to filter and sort results in student views by different criteria (e.g., GPA, last name, major, academic probation status)	so that	users can quickly analyze and act on data for specific student populations.	Student Services
NFRID 9	I want to	Send proactive, automated alerts to students and advisors for key academic events	so that	students are notified when they are falling behind on their academic plan, a required course is filling up, or a registration deadline is approaching.	Students, Advisors
NFRID 10	I want to	Integrate with Disability Services (AIM) and the Financial Aid Portal	so that	a unified digital environment is provided, and the enrollment status is completed prior to financial aid consideration.	Student Support Services
NFRID 11	I want to	Allow for customizable views of instructor rosters	so that	instructors can view their class rosters directly, instead of navigating through a separate section like "My Grades".	Faculty, Student Services
NFRID 12	I want to	Send automated, personalized communications based on a student's status or actions	so that	consistent and timely communication is provided to students throughout their	Student Services

			(e.g., welcome email, housing security deposit reminder)		enrollment lifecycle.	
NFRID	13	I want to	implement Role-Based Access Control (RBAC) down to the data field level for student records	so that	only authorized college officials can access data necessary for their specific role, ensuring strict FERPA compliance	Student Services
NFRID	14	I want to	the faculty attendance submission interface to be mobile-friendly and responsive	so that	faculty can easily and reliably record attendance from any device (e.g., phone, tablet) in the classroom	Faculty
NFRID	15	I want to	ensure system uptime of 99.9% during the critical registration period (7 am - 7 pm local time)	so that	students and staff can consistently access the system during the busiest operational times	Student Services
NFRID	16	I want to	encrypt all Personally Identifiable Information (PII) in transit using industry-standard protocols (e.g., TLS 1.2+)	so that	data transfer between users and the server is protected from interception	IT Services
NFRID	17	I want to	encrypt all PII at rest using AES-256 or equivalent standards	so that	stored student data is protected from unauthorized access in the event of a breach	IT Services
NFRID	18	I want to	the system to automatically generate and format official transcripts	so that	manual transcript preparation is eliminated, reducing errors and processing time	Student Services
NFRID	19	I want to	the request-to-delivery time for an official electronic transcript to be less than 2 hours	so that	students and external recipients receive records in a timely manner, meeting the service-level agreement	Student Services
NFRID	20	I want to	the system to automatically log all data creation and modification events	so that	compliance and regulatory requirements can be	IT Services

					easily validated by providing a complete audit trail	
NFRID	21	I want to	Include detailed logging and auditing capabilities for all student account creation and synchronization events between the SIS and Microsoft Entra ID	so that	ITS can effectively troubleshoot and diagnose the root cause of "Sign In Loop" and other access issues.	IT Services
NFRID	22	I want to	Provide a function to map arbitrary data file headers from external systems (like JotForm exports or legacy data) to the correct SIS database columns	so that	data import and migration tasks are simplified and accurate.	IT Services
NFRID	23	I want to	Provide a robust management interface allowing administrators to control which fields in the SIS are automatically overwritten by daily/nightly synchronization feeds	so that	manual corrections by advisors or staff are not inadvertently erased by the automated process.	IT Services, Administrator
NFRID	24	I want to	Ensure the SIS acts as the authoritative source for all staff and faculty data needed by Moodle (course assignments) and Zoom (user accounts)	so that	the instructional technology systems have current staffing and course assignments.	IT Services, Instructional Services
NFRID	25	I want to	Allow staff access via their existing Microsoft Active Directory/Entra ID credentials	so that	staff are managed under the established identity system (Microsoft) while students use the Entra ID/Google integration.	IT Services, Staff
NFRID	26	I want to	Integrate the SIS degree audit function with "Conclusive Advisor".	so that	To address user complaints regarding the inability to use the existing advisor tool with student data.	IT Services, Advising
NFRID	27	I want to	Maintain a data retention schedule of at least 6-7 years for financial aid and academic records.	so that	To comply with federal regulations requiring documentation for three years	Auditor, Registrar

					post-enrollment.	
NFRID	28	I want to	Support bi-directional data sharing between the "Global" system and the SIS.	so that	To ensure data consistency across external financial or administrative platforms.	IT Services
NFRID	29	I want to	Host digital records in an environment with fire suppression and 24/7 monitoring.	so that	To protect physical and digital student records from environmental hazards and unauthorized access.	IT Services
NFRID	30	I want to	Provide "Fuzzy Match" logic in the account creation workflow. Fuzzy match are similar to strings that sound like each other or are similar spellings to each other.	so that	To catch potential duplicate accounts caused by inconsistent hyphenated names or typos.	IT Services, Student Services

Key Stakeholders

Position/Stakeholder Name (One Name Per Line)	Stakeholder Description
Student Services	This department is a primary hub for student interaction, encompassing admissions, academic advising, career services, and student support. According to the CGCC website, Student Services is responsible for guiding students through the enrollment lifecycle, maintaining student conduct standards, and promoting retention and success through personalized advising and resources like disability services and veteran support.
Information Technology (IT) Services	IT Services (or ITS) oversees the college's technical infrastructure, including network access, classroom technology, and computer labs. In the context of the requirements document, they are responsible for system synchronization (e.g., between the SIS and Moodle or Microsoft Entra ID), data integrity, and providing technical support and remote access to staff and faculty.

Financial Aid	This office manages the administration of federal, state, and local funds, including grants, loans, and scholarships. Their role involves determining student eligibility based on the FAFSA/ORSAA, monitoring Satisfactory Academic Progress (SAP), and adjusting award packages based on changes in enrollment or external funding.
Student Accounts (Business Office / Cashier)	Often functioning within or alongside the Business Office, this stakeholder manages student billing, tuition payments, and fee collections. They are responsible for processing refund checks, applying credits (such as from book buy-backs), and ensuring that student financial records are accurate and up-to-date.
Registrar	The Registrar is the official custodian of student academic records. Their primary duties include ensuring the integrity of grades and transcripts, managing class rosters, overseeing registration processes, and ensuring compliance with federal reporting and privacy regulations (such as FERPA).
Administrator / Administration	This group includes college leadership such as the Dean of Students, Vice Presidents, and the President's Council. They provide high-level oversight of college policies, budget allocations, and strategic planning. In the requirements, they act as decision-makers for automated processes and system-wide implementations.
Auditor	Auditors at CGCC typically refer to independent certified public accountants or state-level officials (such as the Oregon Secretary of State Audits Division). They conduct annual reviews of the college's financial statements and internal controls to ensure compliance with Government Auditing Standards and federal regulations, particularly regarding financial aid and student record retention.

College Process Descriptions And Required Functions

The Student Record

The collection, creation, storage, and sharing of the Student Record is the most important component to the college. This process ensures the consistency of information across all systems at the college. The Student Information System should be able to collect at minimum the following information:

- **Admission Information:** When a student applies, the college collects personal details (name, address, date of birth, SSN/student ID), previous academic history (high school transcripts, test scores), and contact information. (Pronouns, gender, preferred name, veteran, first generation, etc.); Standardized demographic information should be

captured in addition to the previously mentioned information. You must represent what information is possible to collect, share, and store within your student information system.

- **Enrollment and Registration:** As a student enrolls, records are created for course registration, enrollment status (full-time, part-time), and major/program of study. Dates are critical in tracking the student record. These dates include: application date, enrollment date, start date, expected graduation date, graduation date.
 - **Be able** to track pre-requisite courses and co-requisite logic as they relate to courses themselves and course groups.
 - Prerequisite and Co-requisite Logic: The SIS must have the ability to track and enforce the logic for prerequisite and co-requisite courses for both individual classes and course groups.
 - **Be able** to demonstrate actual credit hours for degree applicable effort versus those credit hours that are not degree applicable.
- **Academic Progress:** Throughout student studies, the college tracks:
 - **Grades:** Midterm and final grades for all courses.
 - **LDA:** Non-attendance / last date of attendance record for students that are not showing for courses
 - Robust Attendance Tracking: The system needs an easy-to-use and reliable method for tracking attendance, especially for capturing non-attendance and the last date of attendance (LDA). This is crucial for preventing issues with financial aid.
 - **Transcripts:** Official documents summarizing all courses taken, grades earned, and degrees/certificates awarded. Be able to track appropriate (customizable by CGCC policies) repeat logic for students taking first-time and repeat courses.
 - Repeat Course Logic: It should allow for customizable repeat logic for courses, which must be aligned with CGCC's specific academic policies.
 - **Transfer Credits:** Evaluation and recording of credits transferred from other institutions or earned through prior learning (e.g., AP, CLEP, military service).
 - Be able to track how transfer credits apply to offered courses within a CGCC program of study and easily crosswalk transfer credits that satisfy program of study making those transferred credits reportable on the student transcript
 - **Degree Audits:** Tracking progress toward degree or certificate completion. -> be able to integrate with conclusive advisor. The team is distinctly interested in continuing its use of conclusive advisor.
 - The system must be able to auto award degrees if conclusive advisor integration is unavailable.
 - **Academic Standing:** Information on academic warnings, probation, or honors. Be able to handle a student that might be in good standing with the college but not in good standing for financial aid.
- **Satisfactory academic progress** measured pre-term and post-term; Financial AID SAP is measured at minimum cumulative pace 66.7% or greater (qualitative measure). The

SAP score is also based on the cumulative GPA for the student (quantitative). This requires program length to evaluate the maximum time frame for title IV aid.

- **Program vs Pathway** - the college defines a Program as a collection of courses to be studied by a student / A pathway is like a narrowing of course choices within a program. Other institutions refer to these as Major or area of interest.
- **Financial Information:** Records related to tuition, fees, financial aid applications, scholarships, and payments.
 - Term progress must be tracked for each specific term
 - Cumulative progress for total completion from term 1
 - Return to title 4 calculation must be completed within the SIS; for example, what portion of the fees must be paid back to the federal government!
 - Student Ledger: should calculate line items by course and provide a cumulative amount based on all detailed courses taken.
 - Maintain bi-directional data share between Global and SIS
- **Student Services:** Documentation from interactions with advising, counseling, career services, disability services, and other support departments.
- **Disciplinary Records:** If applicable, records of any disciplinary actions or violations of college policies.
- **Communication:** Records of official communications between the student and the college.
- **Certificate and Program Relationship:** Certificates be able to associate a student's enrollment in a certificate to programs that those certificates can credit towards. I.e., a student enrolled in Airframe Certificate should also be recognized as enrolled in AAS for AMT
- **Student Registration:** Student registration terms are available for a 1-year period in addition to term by term. I.e. A student can register for classes 1 year in advance.

Maintenance and Storage of Student Record

- **Secure Storage:** Both physical and digital records are maintained in secure environments to protect privacy and prevent unauthorized access. This includes fire suppression systems, 24/7 monitoring, encryption, and multi-factor authentication for digital systems.
- **Record Retention Policies:** Colleges have policies outlining how long different types of student records must be retained, in compliance with legal and accreditation requirements. Older records may be archived. The student information system should have an archiving mechanism for data to help keep a clean source of truth for all student records.

Access and Disclosure (FERPA Guidelines)

As an institution of higher education, Columbia Gorge Community College is required to maintain compliance with regulatory bodies that oversee guidelines such as The Family Educational Rights and Privacy Act (FERPA). The following are areas of interest to the college to successfully maintain compliance:

- **Student's Right to Access (Student Portal):** Under FERPA, eligible students (generally those 18 or older, or attending a postsecondary institution) have the right to:
 - Inspect and review their own education records.
 - Request an amendment to records they believe are inaccurate, misleading, or violate their privacy rights.
 - Have some control over the disclosure of information from their education records.
- **Consent for Disclosure:** Generally, a college cannot disclose personally identifiable information (PII) from a student's education record to a third party without the student's prior written consent. This consent must specify the records to be released, to whom, and for what purpose.
- **Exceptions to Consent:** FERPA does allow for disclosure without consent in certain situations, including:
 - **School Officials with Legitimate Educational Interest:** College officials who need to review a record to fulfill their professional responsibilities.
 - **Other Educational Institutions:** To schools where the student intends to enroll or is already enrolled, for purposes related to their enrollment or transfer.
 - **Directory Information:** Information designated by the college as "directory information" (e.g., name, major, dates of attendance, degrees awarded) can be released without consent, provided the student has been notified and has not opted out.
 - **Health and Safety Emergencies:** In situations where there is an articulable and significant threat.
 - **Judicial Order or Lawfully Issued Subpoena:** With proper legal documentation.
 - **Audits and Evaluations:** For federal or state-supported education programs.
 - **Financial Aid:** To determine eligibility for, amount of, or conditions of aid.
- **Record of Disclosure:** Except for disclosures to college officials, disclosures related to some judicial orders or subpoenas, disclosures of directory information, and disclosures to the student, FERPA requires the institution to maintain a record of the disclosure.

Requesting Transcripts and Records

Students generally follow up years later requesting their records for various reasons. The college must be able to easily retain and identify records for retrieval purposes. The Student Information System must allow for a previous student to make requests for their records and help associate those records in relation to the following:

- **Official Transcripts:** Students typically request official transcripts through the Registrar's office or an online portal. These are often sent directly from the college to the intended recipient (e.g., another college, employer) to maintain their official status. There may be a fee for official transcripts.
- **Unofficial Transcripts:** Students can often access and print unofficial transcripts through their online student portal for their own reference.

- **Other Records:** Requests for other specific records usually involve a written request to the appropriate college department.

Admissions Data and Lifecycle

Data Collected for Enrollment and Placement

For CGCC, the data collection is geared toward administrative processing, placement into appropriate coursework, and compliance.

Enrollment and Administrative Data (Required for all Applicants)

This data ensures the student can be enrolled and contacted.

- **Identifying Information:** Full legal name, date of birth, current mailing address, email address, and phone number.
- **Application Form:** A completed, basic application, which for CGCC is typically available online and has **no application fee** for general admission.
- **Demographics:** Ethnicity, race, and gender (collected for federal/state reporting purposes, such as IPEDS, but cannot be used for discriminatory admission decisions per **OAR 715-011-0025**).
- **Residency:** Data to determine Oregon residency status for tuition purposes (**ORS 341.481** and related rules).
- **Prior Educational Status:**
 - High school graduation status, or
 - GED/High School Equivalency status, or
 - Age 18 or older (generally making them eligible to apply without restriction at CGCC).

Academic and Placement Data (Required for Course Enrollment)

Since general admission is open, this data is critical for **course placement**, not admission denial. Oregon community colleges use a **Multiple Measures** approach, often utilizing high school performance data instead of mandatory placement tests alone.

- **Placement Test Scores:** Scores from standardized placement exams (e.g., **ACCUPLACER** or **ALEKS**), if required, for:
 - New students without recent high school data.
 - Students under 16/18 years old.
 - Students seeking entry into specific courses (e.g., college-level Math/Writing) who need to meet a **course prerequisite**.
- **High School Transcript (for Placement):** For recent high school graduates, transcripts may be used to satisfy placement requirements based on:
 - High School GPA (e.g., using a GPA threshold to waive the placement test).
 - Grades in key subjects (e.g., Algebra, English) to determine readiness for college-level courses (a "C-" or better in a course often indicates readiness).

- **Prior College Transcripts (Transfer Data):** Unofficial or official transcripts from other colleges to determine course prerequisites met and transferability.
- **Special Program Requirements:** Additional data required only for **limited-entry programs** (e.g., Nursing, Aviation) which have higher, specific entrance standards:
 - Program-specific GPA, prerequisite course completion.
 - Proof of immunizations, physical exam, or drug screening (if required by the field of study).

Admissions Determination and Placement Process

The admissions process is characterized by acceptance and advising. The advisor has the capability to place a student and allow overrides in the system. The overrides should be "locked" by time trigger in terms attended to make those overrides available to a student.

Phase A: General Admission Determination (Open Access)

1. **Application Receipt:** The college receives the basic application.
2. **Administrative Vetting:** Review confirms the applicant meets the basic eligibility criteria defined in **ORS 341.481** (e.g., 18 or older, or high school graduate, or ability to profit from instruction).
3. **Determination:** For general enrollment, the determination is typically automatic **acceptance**. "Just fill out an application, and you're accepted."

Phase B: Placement Determination (Focus on Student Success)

1. **Skills Assessment (multiple measures) (optional - placement testing):** The student provides documentation (high school transcripts/GPA, previous college transcripts, or takes a placement test) to determine readiness for college-level Math, Reading, and Writing.
2. **Advising Requirement:** All new, degree-seeking students **must meet with an academic advisor** to obtain registration permission ("Clear to Register"). This ensures that academic decisions are *guided* and that students are enrolled in courses where they have the best chance of success, preventing the "wrong placement" problem common in community colleges.
3. Upload unofficial transcripts to applications and have the ability to request official transcripts from schools directly.

Academic advisor overrides need to be pre-loaded into the systems that allows students to register based on initial placements and other triggers (i.e., requisite logic must be configurable and triggered based on the needs of the institution)

The system should detect when a grade is not achieved and perform retroactive requisite checks after grades have been posted for the new term and update a student's admission / enrollment status. Potential tentative status flagged for a student after grades are posted.

Be able to enforce pre-requisites based on scaled measures (e.g., some students may need WR121 z AND q depending on their measures). Different course sections with scaled measures.

The Admissions Lifecycle

The lifecycle emphasizes transition from enrollment to goal achievement (transfer or career).

Stage 1: Prospect and Recruitment (applicant)

- **Activity:** Broad outreach, community engagement, and providing easy access to application materials.
- **Data Focus:** Basic contact information, program interest (e.g., transfer vs. career-technical education), and demographic data for targeted outreach to meet the community's needs.
- **Key Action:** Application submission (no selection needed).

Stage 2: Enrollment and Placement (cleared to register)

- **Activity:** Processing the application, collecting placement data, and mandatory advising.
- **Data Focus:** Placement scores/transcripts, intent-to-enroll confirmation, and financial aid application status (FAFSA/ORSAA).
- **Key Action: Advisor-approved registration** for classes.
- **Struggles:** difficult to understand when a student has just been cleared to registered or if they have actually registered a student. **Potentially note a student who hasn't attended a class, but have enrolled by placing them into a "stalled" type status.**

Stage 3: Current Student and Progression (

- **Activity:** Tracking academic standing and progress toward a degree or certificate.
- **Data Focus:** Grades, academic standing (probation/suspension reports), and course completion data (used to ensure students meet **prerequisites** for subsequent courses).
- **Key Action:** Student support services, tutoring, and timely intervention to improve retention rates.

Stage 4: Completion and Outcome

- **Activity:** Graduation and transfer/career entry.
- **Data Focus:** Degree/certificate awarded, **certification records** (for licenses in fields like Nursing), and transfer data (tracking transfer to 4-year institutions per the spirit of ORS 341.481 to ensure transfer programs provide adequate preparation).
- **Key Action:** Preparation of transcripts and certification records for professional licensure or university transfer.

Advising and Outreach Requirements in the New SIS

Communication and Automated Outreach

The new system will take over much of the manual communication and follow-up, ensuring timely intervention and guidance.

- **Automated Appointment Reminders:** The system will automatically send a reminder notification to students if an advising appointment has not been set up within 7 days of their acceptance.
 - **Follow-Up Trigger:** If the student does not respond to the initial 7-day notification, **advisors will be notified to reach out to the student in another 7 days.** Or, perhaps, the system can generate accurate reports that advisors can pull regularly.
- **Automated Account Credential Delivery:** The SIS should automate the communication of student portal account information (login credentials) to the student via email or through their advisor.
 - **Timing Discussion:** It is considered ideal that the **student portal password be sent prior to the advising meeting** so students can log in before, during, or after their session. This is also noted as a critical step in detecting fraud.
- **Proactive Alerts:** The system should be able to send automated alerts to both students and their advisors for key events, such as when a student is falling behind on their academic plan, a required course is about to be filled, or a specific registration deadline is approaching.
 - **To be able to customize how alerts are triggered within the system based on certain milestones within the student lifecycle process.**

Consistent Record-Keeping and Case Management

The SIS aims to create a comprehensive and consistent history of every student interaction.

- **Integrated Case Management/Ticketing:** The SIS must **include a built-in case management or ticketing system to track student interactions.**
 - **Goal:** This system will **maintain a comprehensive record of all support provided by advising, counseling, and career services.**
- **Standardized Advising Notes:** Allow advisors/staff to collect and maintain consistent notes and information from the student during advising/meeting sessions.
 - **Documentation Tools:** Provide **note templates or key phrases for documentation** to ensure easier and more consistent records across all staff interactions.
 - Easy navigation between fields (e.g., degree audit to advising notes)
- **Permissioned Viewing:** Be able to permit the viewing of advising notes to others so that only authorized staff can view the confidential student record information.
- **Easy Credential Review:** When a new student arrives, how can the advisor quickly access all relevant prior credentials—like high school transcripts and test scores—that were captured from the admission application? What would it look like?

Student Progression and Enrollment Guidance

Tools in the SIS will support better academic planning and registration management.

- **Task Progress Tracker:** Provide a task progress tracker that students, advisors, and the registrar can use to check off completed items.
 - **Notifications:** This system will notify stakeholders when tasks are outstanding or when dependency tasks are completed.
- **Academic Program Templates:** Have a clear, plug-and-play program or pathway (major) template built-in.
 - **Goal:** This allows for **an academic journey that outlines all required credits** to be created and built for the student in the SIS. An integrated degree audit function that students can readily access through their portal eliminates the need for an advisor to craft every single plan for each student and also provides students with a clear roadmap term by term.
- **Registration Gatekeeping:** Provide an administrative function for **Pre-req overrides and Advising overrides**.
 - **Goal:** This function creates a **"gatekeeping enrollment process" to ensure students interact with advisors**.
- **Transfer Credit Evaluation:** The SIS must **automate the evaluation and application of transfer credits** from other institutions, ensuring credits are cross-walked to the CGCC course catalog and automatically applied to a student's program of study.

Enrollment Status Tracking

The system must clearly flag a student's readiness to register:

- **Cleared to Register:** Advising is mandatory for new, degree-seeking students to obtain **registration permission ("Clear to Register")**. The new system must track the distinction between a student who has been "cleared to register" and one who has "actually registered".
- **Stalled Status:** The system should potentially flag a student who hasn't attended a class, despite having enrolled, by placing them into a **"stalled" type status**.

How do these automated features compare to your current manual workflow? It would free up a lot of time for advisors to be more proactive and to potentially provide more time for follow-up meetings that are not just focused on getting a student enrolled in classes.

What would be the biggest procedural concerns you have about transitioning to a new, automated system? The data migration and configuration aspect; who is responsible for this; how long the transition might take. Under data migration, we will want to ensure all state, federal, and other data sharing and reporting is well managed during the integration process because of the various commitments we have to timely extracts and uploads into multiple external systems.

Financial Aid Processing

General Eligibility and Application

A student must meet several foundational requirements to be eligible for federal (Title IV) and state financial aid:

- **Application:** The student must complete the **Free Application for Federal Student Aid (FAFSA)** or the Oregon Student Aid Application (**ORSAA**) to be considered for aid.
 - The Student Information System (SIS) needs to **capture and track the funding sources** for the applicant, including FAFSA, Disability services, Step benefits, and Other benefits, and ensure the FAFSA has been filled out if selected.
- **Admissions Status:** The student must **apply to CGCC** and be **enrolled or accepted for enrollment as a regular student in an aid-eligible degree or certificate program.**
- **Enrollment Status:** The student's financial aid is considered after their enrollment process is complete, specifically upon being assigned the status of "**Applicant - Cleared to Register**".
- **Financial Need:** The amount of aid is determined by the difference between the **Cost of Attendance (COA)** and the **Student Aid Index (SAI)**, which is calculated from the FAFSA.
- **Other Federal Criteria (Typical):** The student generally must also be:
 - A U.S. citizen or eligible noncitizen.
 - Have a high school diploma or equivalent.
 - Not be in default on a federal student loan or owe a repayment of a federal grant.
- **Financial Aid Status Tracking:** Student records must be able to track a student who is **in good standing with the college but not in good standing for financial aid.**
- **Funding Source Capture:** The system must **capture and track the various funding sources** (e.g., **FAFSA**, Disability services, Step benefits, Other benefits) for an applicant and ensure the student has completed their FAFSA if it is a selected source.
- **Enrollment-to-Aid Trigger:** Aid consideration can only proceed **after the enrollment is completed.** Student information must be shared with the financial aid portal upon the student being assigned the status of "**Applicant - Cleared to Register**" to prevent duplicate data entry.
- **Accurate Credit Hour Tracking:** The system must **record and track actual credit hours for degree-applicable courses** versus those that are not degree applicable, which is essential for federal financial aid compliance.
- **Student Accounts Office Collaboration:** Federal Regulations require a separation of function between College personnel who award financial aid and those that disburse the funds to the students' account. Therefore, the **Student Accounts Office** is a critical partner with the Financial Aid Office in ensuring compliance with Cash Management guidelines. As such it is critically important that the system used to award financial aid is compatible and preferably the same as that being used by the Financial Aid Office to award. This system compatibility will further support and facilitate the federal government's requirement that Title IV funds drawn down from the G5/G6 are fully reconciled to the Account Receivables (AR) and General Ledger Trial Balance (GLTB).

- **State Financial Aid and Third Party Scholarship Awarding.** Currently, all Oregon State aid and third-party scholarship funding are manually inputted into Anthology. Financial Aid would prefer to have the ability to import data directly into the SIS using a process handler either from OSAC/HECC or AwardsSpring (CGCC Foundation Scholarship software).
- **Communications Suite:** An essential element of complying with federal regulations is generating timely notifications to students about activities or actions taken pertaining to their financial aid. Currently, CGCC is manually sending most communication to students, sometimes using canned comments. We need to be able to create standard communications templates within the SIS which can be triggered when a process is initiated (For example, R2T4 notification). We also need to be able to send out single or batch communications that are personalized for individual students.
- **Reporting/Query Data functionality:** SIS must have the ability to produce reports and data culling capabilities or integration with external data systems such as Intrinsic Informer, etc.
- **Digital Data Storage capabilities or integration with extra data storage systems such as OnBase:** Federal regulations require the College to store documentation of certain types of financial aid and activities three years from the date the student completes their enrollment. Standard practice is to maintain a data retention schedule of at least 6 - 7 years. The new SIS should ideally have data storage capability or easy integration with an external data storage system such as OnBase, etc.
- **Federal Verification Workflow:** A significant percentage of students selected for federal verification must submit additional documentation before aid can be packaged or disbursed. The system must support a built-in or tightly integrated verification workflow including: a student-specific document checklist, a secure upload portal for required documents, a staff review queue with status tracking, and automated communication to students when documents are received, when additional items are needed, and when verification is complete. Vendors must describe whether this workflow is native to the SIS or requires integration with a third-party document management tool.
- **Cost of Attendance (COA) Configuration:** The system must support a configurable COA budget builder allowing financial aid staff to define cost components (tuition, fees, housing, transportation, personal expenses, books and supplies) by enrollment intensity (full-time, three-quarter time, half-time, less than half-time) and housing situation (on-campus, off-campus, with parent/family). COA budgets must be configurable by award year and must be able to accommodate professional judgment adjustments for individual students.

Satisfactory Academic Progress (SAP) Requirements

To **maintain** eligibility for financial aid after the initial award, the student must meet Satisfactory Academic Progress (SAP) standards. The SIS must include functionality for **SAP and Degree Audits**.

Additionally, In order to resolve prior issues with SAP enforcement, the SIS must not only calculate whether a student meets SAP standards — it must also automatically prevent Title IV aid from being disbursed to students who do not. The college has experienced cases where students who were not meeting SAP requirements were not placed on suspension and received aid they were ineligible for, because the identification and hold process was not sufficiently automated. The following requirements address both the calculation and the enforcement side of SAP.

- **Quantitative Measure (Pace):** The student must maintain a **cumulative completion rate (pace) of 66.7% or greater** (two-thirds of attempted credits).
 - Grades of A, B, C, D, and P (Pass) typically count as credits passed, while F, NP, I (Incomplete), and W (Withdrawal) are usually attempted but not completed.
- **Qualitative Measure (GPA):** The student must maintain a minimum **cumulative GPA** (typically **2.0** or higher for Oregon community colleges).
- **Maximum Time Frame:** The student must be able to **complete their declared degree or certificate within 150% of the published program length** (maximum attempted credits allowed).
- **Non-Aid-Eligible Courses:** Federal financial aid generally **will not pay** for registered credits in classes **not required for the student's major** or for a passed class taken more than once.
- **Professional Judgment (PJ) Documentation:** Financial aid administrators must be able to document professional judgment decisions — adjustments made to the standard aid calculation based on unusual individual circumstances such as job loss, medical expenses, or death of a parent. For each PJ decision, the system must record: the nature of the circumstance, the adjustment made, the supporting documentation reference, and the identity of the approving financial aid administrator. PJ records must be retained in accordance with federal record retention requirements and must be accessible for audit.
- **SAP Hard Stop on Disbursement:** The system must enforce a hard system block preventing any Title IV aid disbursement to a student whose SAP status is “Suspension” or equivalent. This block must be automatic — it must not rely on staff to remember to check SAP status before processing a disbursement. The only way to release the block must be through a documented appeal or reinstatement process (see below).
- **Automated SAP Evaluation at Term End:** The system must automatically evaluate every aid-recipient student’s SAP status after grades are posted for each payment period, applying both the quantitative (pace) and qualitative (GPA) measures. Students who fail SAP must be automatically placed on the appropriate status (warning, suspension, or probation) without requiring manual identification by staff.
- **SAP Appeal and Reinstatement Workflow:** The system must support a documented SAP appeal process: the student submits an appeal, a financial aid administrator reviews it, and a decision is recorded with the reviewer’s identity, the date, and the basis for the decision. If an appeal is approved, the system must document any academic plan the student is required to follow and must monitor compliance with that plan each subsequent term.

- **SAP Status Report:** The system must produce a report of all students evaluated for SAP at each evaluation point, showing the outcome (satisfactory, warning, suspension, probation, appeal approved/denied), the date evaluated, and the staff member who reviewed or approved any exceptions. This report must be retained as audit evidence. Vendors must confirm this report is automatically generated and does not require manual compilation.

R2T4 Accuracy, Timeliness, and Documented Review Controls

In order to resolve prior issues with R2T4 calculation accuracy and the absence of a documented review process, the SIS must do more than perform the calculation — it must ensure the calculation is triggered automatically, that every input is traceable, that a supervisor reviews and approves the result before any return is processed, and that the entire workflow is retained as audit evidence. The college has experienced cases where R2T4 calculations were either not performed or were mechanically incorrect, and where no formal review process was in place to catch errors before they resulted in incorrect fund returns.

- **Return of Title IV (R2T4) Calculation:** The SIS must perform the **Return of Title IV (R2T4) calculation** to determine the portion of federal aid that must be repaid to the federal government if a student officially or unofficially withdraws.
 - Federal aid is **"earned" progressively** based on attendance. If a student withdraws before completing more than **60% of the term**, they have not earned 100% of their aid, and the unearned portion must be returned.
- **Last Date of Attendance (LDA):** The system must accurately **record the Last Date of Attendance (LDA)** for students who withdraw or are administratively withdrawn to calculate tuition refunds and mandatory financial aid adjustments.
- **Transcript Notation:** For a student who has been accepted or is already enrolled and chooses to officially withdraw, this status is often associated with a **"W" (Withdrawn) notation** on their academic transcript. The SIS also needs to **generate transcripts** that clearly indicate a "W" notation for a student who has "withdrawn after decision" for academic and financial aid records.
- **FA Grade** - an unearned F grade has been established to clearly delineate the students who have unofficially withdrawn or abandoned their coursework in a given term. The new SIS should allow faculty to assign this grade in accordance with the reporting period designated by the Registrar's Office even though it will be treated similar to a withdrawal grade.
- **Automated R2T4 Trigger:** The system must automatically initiate an R2T4 calculation whenever a student who has received Title IV funds withdraws officially or is identified as having unofficially withdrawn (including assignment of an FA grade or last-date-of-attendance recording by faculty). The calculation must be initiated without requiring staff to manually identify that an R2T4 is needed.
- **Step-by-Step Calculation Display:** The system must display the R2T4 calculation in a step-by-step format showing all inputs (payment period dates, withdrawal date or last date of attendance, percentage of period completed, total Title IV aid disbursed, earned aid amount, unearned aid amount, and return responsibilities of the institution and the

student). Every input used in the calculation must be traceable to a source record in the SIS.

- **45-Day Return Deadline Tracking:** The system must track the 45-day deadline for returning unearned Title IV funds to the Department of Education following each R2T4 calculation. When a return is required, the system must alert designated staff and must flag the case as unresolved until the return transaction is posted. Late returns must be flagged distinctly in the system.
- **Supervisory Review and Sign-Off:** Each completed R2T4 calculation must go through a documented review and approval workflow. A designated supervisor must be able to review the calculation, approve or reject it, and add notes. The system must record the reviewer's identity, the date of review, and the outcome. This record must be retained as audit evidence and must not be editable after sign-off.
- **R2T4 Workload Report:** The system must produce a report of all R2T4 cases in a given period showing status (pending calculation, calculated and under review, approved, funds returned, late), the withdrawal date, the deadline for return, and the responsible staff member. This report must be available to supervisors at any time without requiring vendor assistance.

Exit Counseling Automation and Tracking

In order to resolve prior issues with exit counseling delivery to graduating and withdrawing loan borrowers, the SIS must automate the notification process and provide staff with the ability to independently verify that it is functioning correctly. Exit counseling is required under 34 CFR 682.604 for all Stafford Loan and graduate PLUS borrowers who cease at least half-time enrollment. The college has experienced failures in this area where a notification process was nominally configured but was not operating as intended — and there was no mechanism to detect the failure short of a compliance review. The new SIS must make this function reliable and self-evident to staff.

- **Automated Exit Counseling Trigger:** The system must automatically identify all Stafford Loan and graduate PLUS borrowers when their enrollment status changes to withdrawn or graduated (or when they drop below half-time). For students who withdraw with the college's knowledge, exit counseling notification must be sent prior to or at the time of withdrawal processing. For students who withdraw without prior notification, the system must send notification within 30 days of the college becoming aware of the withdrawal.
- **Delivery Confirmation Tracking:** The system must record the date, method (email or interactive electronic means), and delivery status of every exit counseling notification sent. If a notification fails to deliver, the system must alert staff and must log the failure. Staff must be able to manually mark an exit counseling as completed (e.g., for an in-person session) and record the date and method.
- **Exit Counseling Compliance Report:** The system must produce a report of all loan borrowers who graduated or withdrew in a given period, showing for each: whether exit counseling was sent, the date sent, the delivery method, and the delivery status. This report must be producible at any time and retained as audit evidence. Vendors must describe how this report is generated and confirm it does not require any manual compilation.

- **Configuration Verification:** Vendors must describe how exit counseling notification settings are configured and how the college can independently verify that the configuration is working correctly on an ongoing basis. A test or simulation mode that demonstrates the notification trigger is functioning as configured is strongly preferred, so that staff do not have to wait for a compliance review to discover a configuration problem.

SIS Financial Integration Requirements

The new SIS must integrate with external systems to facilitate the financial aid process securely and accurately:

- **3rd Party Tool Integration:** The SIS must **integrate with a 3rd party tool for financial aid processing via API** to share financial aid data (including SSN, which is optional) without duplicate data entry.
- **Regulatory Compliance:** The system must be able to **accommodate new ISIR data elements and processing timelines** to ensure compliance with evolving federal regulations, such as the FAFSA Simplification Act.
- **Consortium Agreements:** When a CGCC student is enrolled in courses at a host institution under a consortium agreement, the system must be able to record the consortium enrollment, calculate enrollment intensity across both institutions for financial aid purposes, and manage the aid award based on combined enrollment. Vendors must describe how consortium agreements are configured and how data from the host institution is captured.

Federal Financial Aid Compliance: Additional Controls

The requirements in this section address specific internal control weaknesses the college has experienced in administering federal financial aid programs. In order to resolve prior issues with timely and accurate federal reporting, disbursement monitoring, third-party servicer oversight, R2T4 compliance, exit counseling, and satisfactory academic progress enforcement, the SIS must provide the controls described below. These requirements supplement the financial aid language elsewhere in this document and should be read together with it. Vendors must be prepared to demonstrate each of these capabilities explicitly during Phase 2 demonstrations.

Note: *These requirements reflect areas where the college has experienced compliance challenges and is seeking system-level controls to prevent recurrence. Vendors must demonstrate, not merely describe, how their system addresses each area. Where a requirement calls for a report or workflow, vendors must show a working example during demonstrations.*

NSLDS Enrollment Reporting Controls

In order to resolve prior issues with timely and accurate NSLDS enrollment reporting, the SIS must provide automated controls that ensure student enrollment status is reported correctly and on schedule — without relying on manual staff processes to identify what needs to be reported

or when. The college has experienced problems with both the accuracy of reported data and the timeliness of submissions, including failures to certify students within required 60-day windows and mismatches between SIS records and what was reported at the campus and program level. The following requirements address these issues directly.

- **Automated NSLDS Reporting:** The system must generate NSLDS enrollment reporting files automatically on a scheduled basis, covering both campus-level and program-level enrollment status and effective dates for all students receiving federal aid, in the format required by the National Student Clearinghouse or NSLDS direct reporting. The system must not rely on manual data compilation to produce these files.
- **60-Day Certification Cycle:** The system must track the 60-day NSLDS certification requirement and alert designated financial aid staff when students are approaching or past due for certification. The alert must be visible in the system dashboard and must also be deliverable by email. Staff must be able to produce a list of all students whose NSLDS certification is overdue at any point in time.
- **Status Change Reporting Within 30 Days:** When a student's enrollment status changes (withdrawal, leave of absence, graduation, reduction in credits), the system must flag the change for NSLDS reporting and must track whether the required report was submitted within 30 days. If a scheduled transmission is due within 60 days of the change, the system must include the change in that transmission automatically.
- **NSLDS Reconciliation Report:** The system must produce a reconciliation report comparing the enrollment status and effective dates recorded in the SIS against what was most recently reported to NSLDS, for every student receiving federal aid. Discrepancies must be surfaced explicitly so that staff can identify and correct mismatches proactively. This report must be producible at any time and must be retained as evidence of the control being performed, with a record of who ran it and when.
- **Program-Level Enrollment Tracking:** The system must separately track and report enrollment status and program begin dates at the program level (not only the campus level), as required by 34 CFR 682.610. Both campus-level and program-level data must flow into the NSLDS reporting file.
- **Audit Evidence Retention:** The system must retain a log of every NSLDS submission, including the date submitted, the staff member or process that initiated it, the number of students included, and the file or transmission identifier. This log must be accessible for audit review without requiring vendor assistance.

Outstanding Title IV Disbursement Monitoring

In order to resolve prior issues with monitoring outstanding Title IV disbursements, the SIS must provide controls that track every disbursement from issuance through confirmation of receipt, and that alert staff before federal return deadlines are missed. Federal regulations (34 CFR 688.164) require unclaimed Title IV funds to be returned to the Department of Education no later than 240 days after issuance; funds may not escheat to the state or revert to the college. The college has lacked a systematic control to ensure these deadlines are met.

- **Outstanding Disbursement Aging:** The system must maintain a real-time aging report of all Title IV disbursements issued to students (whether by check or EFT) that have not been confirmed as received or negotiated. The report must show the student name,

disbursement amount, date issued, disbursement method, and number of days outstanding. It must be filterable to show disbursements approaching the 45-day returned-funds window and the 240-day absolute return deadline.

- **Automated Deadline Alerts:** The system must automatically alert designated staff when a Title IV disbursement has been outstanding for a configurable number of days (e.g., 30, 60, 200 days). Alerts must escalate as deadlines approach. Staff must be able to record in the system what action was taken on each outstanding item, and that record must be retained as audit evidence.
- **Return-to-ED Workflow:** When a Title IV disbursement reaches or approaches the 240-day limit without being negotiated, the system must flag it for return to the U.S. Department of Education, initiate a reversal of the disbursement on the student ledger, and record the return transaction with a date stamp and the responsible staff member. The system must prevent these funds from being redirected to any other purpose.

Academic and Enrollment Requirements

The new SIS must support a wide range of student statuses, including both Degree-Seeking and Non-Degree-Seeking. This ensures all types of students can be properly managed within the system.

Automated Application Intake and Evaluation

The new SIS must automate the process of receiving and evaluating student applications.

- **Legitimacy Check (Fraud Detection):** The system should have an automated or semi-automated process to assess the legitimacy of applications, using factors like IP address, physical address, and phone number to flag suspicious entries. This replaces the current manual review in a Google Sheet that is populated from Jotform. Establish integration with a service / application that can validate the provided information matches based on a large repository of information (i.e., address validation utility); adding in more personalized response fields like "why are you applying from outside Oregon" has helped reduce fraudulent apps
- **Account Creation vs. Update:** Upon a legitimate application, the system should automatically check for an existing student account by matching key fields like Date of Birth, first name, last name, and phone number, and social security #. If a match is found, the system should automatically update the existing account rather than creating a duplicate. This eliminates the current manual check by Student Services. the current system does not catch when hyphenated names are not consistent.
- **Account Searching and Identification:**
 - A % based matching system to identify how much provided information matches already existing accounts (i.e., a list page or report that shows a sorted list of accounts that have partial or positive matches)
 - Fuzzy matches that catch potential hyphenated duplicates through matching what-ifs
- **Override Automation:** We need to be able jump out of the automated creation process for a student and manually create accounts within systems

- **Task progress tracker** that student / advisor / registrar can check off as items are completed; prompt when tasks are outstanding and notify stakeholders when new tasks are assigned to them or dependency tasks are completed.
- **Status Assignment:** Based on the application data (e.g., selected program of study), the system should automatically assign the correct initial student status, such as:
 - **Degree-Seeking** or **Non-Degree-Seeking**.
 - Possible Student Lifecycle Statuses can be:
 - **Prospect**
A **prospect** is someone who has shown initial interest in the institution but has not yet formally applied. This status is part of the "recruitment funnel" and is managed by the admissions team. A person becomes a prospect by making an inquiry, such as filling out a web form, attending a college fair, or requesting more information. They are still exploring their options and may or may not apply.
 - **Applicant**
An **applicant** is a prospect who has taken the formal step of submitting an application for admission. This status indicates they have committed to being considered for enrollment. The SIS tracks their progress through the admissions process, including submitted documents, application fees, and a checklist of required items.
 - Items to consider for an applicant:
 - Check funding sources for applicants and identify which sources the applicant will be using
 - If FAFSA is one selected source, ensure student has filled out their FAFSA
 - Disability services
 - Step benefits
 - Other benefits
 - **Student**
A **student** is an individual who has been accepted and has officially enrolled at the institution. This is a critical status change in the SIS, as it signifies the transition from the admissions process to the academic journey. The student record is now active, with modules for attendance, academic performance, and financial aid. A student is typically associated with a specific major, program, or certificate.
 - **Withdrawn Prior Decision**
This status is for a prospective student or applicant who decides to end their application process before a final admissions decision (e.g., acceptance or denial) has been made. A withdrawal prior to a decision means the student has chosen not to continue their pursuit of enrollment at the institution. A student's record may indicate they were a "former applicant".
 - **Withdrawn After Decision**
This status applies to a student who has been accepted or is already

enrolled, but chooses to officially withdraw from the institution. This status is often associated with a "W" notation on their academic transcript. The date of withdrawal is crucial because it can affect financial aid eligibility and may require a Return of Title IV (R2T4) calculation to determine if the student owes money back to the school.

- **Completed**

The **completed** status is assigned to a student who has successfully finished their academic program and earned a degree, certificate, or other credential. This status is often a final step in the student's lifecycle within the SIS and is used for record-keeping and reporting purposes.

College Now / Early College Enrollment processes

College Now, coordinated by Columbia Gorge Community College and local high schools, lets students earn transferable college credit while taking approved classes at their high school, earning both high school and college credit at the same time. Earning credit of this kind most commonly referred to as 'dual credit'.

The process for enrollment into College Now at Columbia Gorge Community College is as follows with representative dates as examples:

1. **Apply to CGCC:** All students must first apply to the college. This is a one-time process, so returning students who have previously taken a College Now course do not need to apply again. (*college now course is a course taught by a high-school teacher*) (*college now courses will only show for those students enrolled in high school*)
2. **Complete Required Forms:** Before earning college credit, students must submit a Parent/Guardian Permission Form. This digital form is valid for the student's entire high school career. Additionally, sophomores must submit a signed Sophomore Exception Form to be eligible.
3. **Register for Courses:** Students register for classes through the CGCC Student Portal, which is the same process as degree-seeking students. A College Now instructor will provide a "permission code" for students to register for their specific course. Registration for a class aligns with the CGCC term in which the class ends.
4. **Pay Tuition:** The student is responsible for paying the College Now tuition, which is currently \$63 per class for the 2024-25 school year. This is significantly less than the standard per-credit tuition. Some high schools may cover these fees, but students should confirm this with their school counselors.
5. **Eligibility:** The College Now program is primarily for high school juniors and seniors. Sophomores may be eligible if they submit a signed Sophomore Exception Form.
6. **Location:** The courses are taught by qualified high school instructors during regular school hours at the student's high school. The following needs to be possible to capture:

- a. Be able to capture the high school / location at which the course is being taken and which teacher is assigned to the course
- b. Be able to set up high school teachers to connect into the SIS to be able to handle all items related to teaching a course at CGCC (login, gradebook, etc.)

Community Ed / Concurrent Enrollment

For adult learners, hobbyists, or those seeking workforce certifications, CGCC offers non-credit and specialized training courses. CGCC is looking for a student information system that can comprehensively support and manage the community education and concurrent enrollment process for students. The current process used at the college for the Community Education services is as follows:

- **Find a Class (CourseStorm):** Students can browse and select from a variety of non-credit classes offered through the Community Education program, which can be found in the quarterly class schedule or on the CGCC website. Many of these classes are offered in partnership with other services like Ed2Go for online courses.
- **Provide Information:** When registering, students must provide basic demographic information, including their name, date of birth, mailing address, and phone number.
- **Register and Pay:** Students can register in person or over the phone. Payment for the class is required at the time of registration. Online courses through Ed2Go require students to enroll and pay directly through the Ed2Go platform.
- **Confirm Enrollment:** Pre-registration is required for all Community Education classes, and students should not show up to class unless they have registered. This is to ensure they are on the class roster and to avoid issues with low-enrollment cancellations.
 - **Admission:** Unlike for credit classes, separate admission to CGCC is not required for most Community Education courses.
 - **Fees:** Community Education classes are fee-based, and no tuition waivers or discounts, such as those for seniors, apply to online Ed2Go classes.
 - **Requirements:** The enrollment requirements for each community education class are set by the instructor and can vary depending on the class's purpose and scope.
 - **Records:** Non-credit courses typically do not create a permanent academic transcript in the same way that credit-bearing courses do.

Advising Processes

Columbia Gorge Community College (CGCC) advising services help students plan classes, select career pathways, and prepare to transfer. You can schedule appointments, find advising guides, and check specific contact hours on the CGCC Academic Advising page.

The student information system should be able to support the advisors throughout the advising process during a student's enrollment. The following are ways in which the system can support the advisors in their processes:

- Advisors send the password for students to login before, during or after the advising meeting. It would be ideal that passwords are automated in sharing with the student. It is very helpful if new student account passwords are sent prior to advising.
- Automated notification to students if an advising appointment hasn't been set up within 7 days. If after sending the 7 day notification and no response from the student, notify advisors to reach out and engage the student in another 7 days.
- Having a clear program or pathway (major) template built-in that is plug and play for each program or pathway that can be opened within and built for the student in the Student Information System during a Student's advising appointments and before.
- Advising / all meetings should be able to collect notes and information from the student during the advising/meeting session to maintain a consistent record. These notes should be able to be permissioned for others to view. These notes should be available for every communication with the student. Note templates or key phrases should be available for easier documentation and consistency. Where the advisor can select from a key phrase, and that phrase will be inserted into the notes field for a student interaction.

We have received your admissions application to Columbia Gorge Community College. We are thrilled to welcome you to CGCC and look forward to supporting your academic journey! Please take a moment to review the attached information.

Your next step is to set up an appointment with an Academic Advisor.

1. You can go to [cgcc.edu/advising](https://www.cgcc.edu/advising), scroll down the page, find/select an advisor, select "Click here to schedule an appointment", select a day, time and method; in person-The Dalles or Hood River, zoom or phone, whichever works best works for you. Please select a 45 minute New Student appointment time.
2. You will want to select an Academic Advisor that specializes in your area of study.
3. Add any information to the "Notes" section (example: new student, term your interested in starting classes, which Degree/Program also), any information that will help the Advisor assist you in your appointment.
4. If you have attended another college or university or just finished high school, it is helpful to have your transcripts available when you speak with the advisor. (Unofficial copies can be used for advising purposes).
5. Once you have finished scheduling your appointment, you will receive an email and text confirmation.

Summer and Fall Term registration opens May 12, 2025.
 Summer Term classes begin June 23, 2025.
 Fall Term classes begin September 22, 2025

To schedule an Advising Appointment: <https://www.cgcc.edu/advising>
 To view our Tuition and fees chart: <https://www.cgcc.edu/cgcc-tuition>
 To view our term course schedule: <https://www.cgcc.edu/cgcc-class-schedule>
 To view our College Catalog with Degrees/programs and course descriptions: <https://www.cgcc.edu/cgcc-college-catalog>
 Campus housing: <https://www.cgcc.edu/housing>
 Academic calendar: <https://www.cgcc.edu/academic-calendar>
 Scholarship information: <https://www.cgcc.edu/cgcc-scholarships>
 Veterans information: <https://www.cgcc.edu/veterans>
 Campus Maps: <https://www.cgcc.edu/maps>

Again, welcome to CGCC!

- Pre-req overrides, advising overrides, "gatekeeping enrollment process" may be a positive thing to ensure students interact; there are potential issues when IT systems make unnecessary hurdles. It is helpful to allow advisors to jump over hurdles when it makes sense, thus not locking advisors into strict pathways when unique people and needs are involved.
- At this point, it is important to note how instructional services might need information from the advising processes in the following ways:
 - Faculty should have a class roster once the student is registered for courses
 - Pre-College Students/EOSL/GED are entered into the system after courses have started (generally 2 weeks after courses started)
 - Student logins are very difficult due to emails not working at start of term
 - Student Information System should be able to synchronize / interface with Moodle (LMS) once the registration process is complete with advisors

Flexible Student Status Management Workflows

The new SIS must handle all student statuses seamlessly throughout the enrollment lifecycle.

- **Expanded Statuses:** The system must support a wide range of statuses for both **Degree-Seeking** (e.g., "Cleared to Register," "Currently Attending") and **Non-Degree-Seeking** (e.g., "NDR Cleared to Register"). These status titles are not required but the concepts must be available.
- **Automated Workflow Triggering:** The system should use these statuses to automatically trigger subsequent workflows. For example, a change in a student's enrollment status should trigger the correct account creation workflow, pushing information to systems like Microsoft Entra ID without manual intervention.
 - **SAP**
 - **R2T4**
 - **Degree Audits**
 - **Proactive Alerts**

The system should be able to send automated alerts to both students and their advisors for key events, such as when a student is falling behind on their academic plan, a required course is about to be filled, or a specific registration deadline is approaching.
 - **Transfer Credit Evaluation:** The SIS should automate the process of evaluating and applying transfer credits from other institutions. This includes cross-walking courses from other colleges to CGCC's course catalog and automatically applying those credits to a student's program of study.
- **Case Management & Ticketing:** The SIS should include a built-in case management or ticketing system to track student interactions with various departments, such as advising, counseling, and career services. This ensures a comprehensive record of all support provided to the student.
- **Automated Communication:** The system should be able to send automated, personalized communications to students based on their status or actions. For example, a welcome email with a checklist for new students, a reminder about a security deposit for housing applicants, or a follow-up after a career services appointment. Additionally, automated start of term information should be possible to communicate out to students.
- **Error Prevention:** The system should include built-in validation checks to prevent data entry errors. The current process relies on manual data entry, which can lead to typos and synchronization issues. The new system should minimize these errors and provide clear alerts when a data mismatch occurs. Data validation checks should include, but is not limited to:
 - First and last names
 - Date of Birth
 - SSN (optional)
 - (institution verification such as High school, colleges, etc) CEEB Code (optional)
 - integration with CEEB code database for verification
 - Email

- Academic Program Selection (academic program should match declared program)
- Course catalog and year should determine the total academic journey of the student (i.e., how many credits are required for a student to complete a program)

Instructional Services & Learning Commons

This document serves as a collaborative framework to define the future-state operations for **Instructional Services, the Library, and the Learning Commons**. The goal is to move from manual, siloed workflows—like tracking applications in Google Sheets or manually managing Moodle rosters—to a unified, automated environment.

Faculty Portal & SIS-LMS Integration

Faculty efficiency depends on a "silent" integration between the SIS and Moodle. When a course is scheduled in the SIS, a shell should automatically be provisioned in Moodle. As students are "Cleared to Register" and complete enrollment, they should be automatically pushed to the Moodle roster in real-time. This eliminates the common "Sign-In Loop" and ensures that students have access to course materials the moment the term begins.

- **Seamless Enrollment Sync:** Real-time synchronization of student account status and attributes ensures that faculty rosters are always accurate without manual data entry.
- **Simplified Grade Submission:** Faculty require a secure, intuitive interface to submit midterm and final grades, as well as an "Unearned F" (FA grade) for students who have unofficially withdrawn or abandoned coursework.
- **Course Outcomes Assessments:** *Potentially attach to the grading process to enable a "simple as possible" process or integrated process that allows grades to be submitted at the same time as CLO and ILO.* Be able to have an instructor enter a course outcome assessment (Course Learning Outcomes)(CLO) for a student and record institutional learning outcomes (ILO) for a course. We should be able to aggregate and disaggregate student information from the overall results of the ILO and CLO.
- **Direct Roster Access:** Instructors should be able to view their class rosters directly within the portal without navigating through unrelated sections like "My Grades".
- **Attendance & LDA:** Faculty must have an easy-to-use method for tracking the Last Date of Attendance (LDA), which is critical for financial aid compliance and R2T4 calculations.
- **Easy To Use Portal:** The portal should have a dashboard of these functions for each task required to be completed. I.e., a card that a faculty member can click on that goes directly to the gradebook. Much like a Windows start bar with cards that are easily clickable.
- **Faculty Portal Assessments:** How can assessments be integrated; posted within the portal that allows faculty to take assessments / surveys then collate the data into a data analysis process
- **Blog / Announcement / Newsboard:** How to make announcements / posts / blogs/ information readily available for faculty through the faculty portal. This includes policies / administrative rules or other materials essential to the function of a faculty member.
- **Third-party softwares currently in use that should be replaced or seamlessly integrated within a new system:**

- Excel and spreadsheets are heavily used to do grades; which are transferred to the gradebook
- Coursestorm tracks rosters and payments for students in Community Education
- SBDC uses a third party solution for rosters / course enrollments (like coursestorm) (or the ability to support community education enrollment seamlessly).
- Look at RCampus as a survey / data collection tool

Library Services & Resource Accountability

For Instructional Services, the Library is a resource hub rather than an identity provider. The focus is on the availability of academic tools. When a student borrows high-value technology—such as a laptop or hotspot—the SIS should track the loan as part of the student's holistic record. If these items are lost, damaged, or not returned by the end of the term, the system should automatically place a financial hold on the student's account. If an item isn't returned, then a notification process should exist in notifying the student and notifications should be tracked within the SIS. When the payment is complete in the business office for an item, that transaction should be recorded within the SIS to close out the lost, damaged, or not returned item.

- **Technology Loan Tracking:** The SIS must record and manage information related to technology and equipment loans to ensure institutional assets are protected.
- **Automated Financial Holds:** Integrated triggers allow for the placement of financial holds that prevent registration or transcript release until library or technology debts are resolved
- **Book or Materials Loan Tracking:** Be able to track when items are lost and how those lost items are associated with a student account.
- **Course Reserve Visibility:** The student portal should ideally display materials placed on "Reserve" by instructors, specifically tailored to the student's currently enrolled courses.
- **Third-party softwares:**
 - NetTutor could offer all of these services; implications to student materials tracking
 - Slingshot book resources / ordering with the Bookstore

Learning Commons: Tutoring, Testing, & Early Alert

Academic support must be integrated into the instructional workflow. If a student shows low participation in Moodle, an "Early Alert" should be triggered, notifying the Learning Commons to initiate a tutoring referral. Tutors then use a built-in case management system to log interactions, which advisors can view to ensure a "comprehensive record of support".

- **Proactive Success Referrals:** Integration with an Early Alert system allows faculty and staff to partner in supporting students who demonstrate behaviors that may hinder success.

- **Centralized Support Notes:** Tutors and staff collect and maintain consistent notes during meeting sessions, which are permissioned for authorized staff (like advisors) to view.
- **Task Management:** Students can check off completed academic support milestones—such as a mandatory tutoring session—within a unified task progress tracker.
- **Test Proctoring (Internal):** Placement exams that need to take place and tracking those within the student record
- **Test Proctoring (External / University proctoring):** Does not need to be tracked. However, resource scheduling or room availability may be a difficulty?
- **Third-party softwares:**
 - Currently recording tutoring on spreadsheets to track who's accessing it
 - Difficult to track efficacy of support in the student support lifecycle

Community Ed & Specialized Instruction

CGCC's instructional mission includes specialized populations like **College Now** and **Community Education**. The SIS must be flexible enough to handle these without forcing them into a standard "Degree-Seeking" mold.

- **College Now Oversight:** The system must capture high school locations and assigned teachers, while ensuring "Parent/Guardian Permission" and "Sophomore Exception" forms are digitally stored.
- **Community Ed Agility:** Non-credit courses should not require a full academic transcript or complex admission process; the focus is on basic demographic collection and immediate payment at registration.
- **Pre-College & ESOL:** The system must allow for the entry of Pre-College, ESOL, and GED students after courses have already started, typically a two-week grace period.
- Be able to handle schedule building for these types of classes
- **Third-party softwares:**
 - Coursestorm catalog and registration
 - Jotform collects information for Childcare Partners
 - Spreadsheets heavily used for collecting data and storing data. This also includes schedule building
 - Pre-College Teaching software (Aztec???) (tracks progress and provides self-assessment)

Pre-College Programs (GED & ESOL)

Pre-College programs serve as the foundational entry point for many students. Because these populations often have different registration timelines, the SIS must be flexible enough to allow student entry after the official term start—typically up to two weeks into the session.

- **Delayed Registration:** The process must allow for "late-start" enrollment to accommodate the specific needs of GED and ESOL learners.

- **Success Tracking:** While these students may not be in an AAS program, the system should track their progress toward GED completion or transition into credit-bearing "Academic Pathways".

Nursing & Health Occupations

This is a "Limited-Entry" program with higher entrance standards and external compliance requirements. The application process is not "Open Access" and requires the collection of additional sensitive data, such as program-specific GPAs, prerequisite completion, and proof of immunizations.

- **Clinical Compliance:** The SIS must store and track certification records, licenses, and health-related documents required for professional licensure.
- **Cohort Management:** The system must support specialized program-length evaluations to monitor maximum time frames for aid and completion.

Career & Technical Education (CTE) and "College Now"

CTE programs, such as Aviation Maintenance (AMT), often involve nested credentials where a student enrolled in a certificate program is also recognized as working toward an Associate of Applied Science (AAS) degree. For the "College Now" high school partnership, the SIS must accommodate external instructors.

- **Certificate-to-Degree Mapping:** The system must automatically associate certificate enrollments with the larger degree programs they credit toward.
- **HS Instructor Access:** It could be beneficial for High school teachers to be provisioned with SIS login credentials to manage gradebooks and rosters for college-credit courses taught at the high school.
- **Age-Based Eligibility:** The system must track specific digital forms, such as Parent/Guardian Permission and Sophomore Exception forms, for high school students.

Curriculum, Assessment, & The Library

These functions support the structural integrity of the college's offerings. The SIS serves as the source of truth for the Course Catalog, which defines the "Academic Journey" and dictates prerequisite logic.

- **Catalog-Driven Logic:** The course catalog and year must automatically determine the total credits and required courses for a student's graduation.
- **Assessment Tracking:** Instructional Services must be able to pull data from the SIS to perform academic assessments and report on student learning outcomes to state bodies like the HECC.
- **Library Support:** While not managing identities, the Library utilizes SIS data to manage course reserves and track technology loans, ensuring students have the physical tools needed for instruction.

Level	Function	Narrative Purpose
Foundation	Curriculum & Assessment	Defines course logic, prerequisites, and catalog years.
Entry	Open & Limited Admissions	Differentiates between general "Open Access" and specialized Nursing/CTE entry.
Specialized	Pre-College & Comm Ed	Manages flexible start dates for GED/ESOL and fee-based registration for non-credit.
Integration	LMS & HS Partnerships	Synchronizes Moodle rosters and provides access for College Now HS instructors.
Support	Learning Commons & Library	Facilitates tutoring referrals and manages academic resource loans.
Compliance	Federal & State Reporting	Generates reports for NSLDS, Clearinghouse, and HECC based on instructional data.

Business Services — Student Financial Services (Required)

The SIS must serve as the complete system of record for all student accounts receivable. This includes establishing and maintaining charge codes, posting tuition and fee charges, applying financial aid credits, receiving and recording payments, generating student refunds, managing holds, and producing the transaction exports consumed by the college's ERP (currently Microsoft Dynamics 365). The college does not require the SIS to function as a full ERP or to manage institutional accounting; however, all student-level financial activity must originate, be tracked, and be auditable within the SIS.

An integrated ERP module within the SIS is acceptable but not required. Vendors proposing a SIS-only solution must clearly describe how student financial transactions are exported to an external ERP, including the data elements, GL coding structure, frequency, format, and error-handling process.

All requirements in this section are required unless explicitly labeled optional.

Student Ledger & Course-Fee Mapping

- **Comprehensive Student Ledger:** The system must provide a unified student ledger that calculates detailed line items grouped by course and generates a clear, cumulative total based on all registered credits and applied fees for the term.
- **Dynamic Fee Application:** The system must automatically apply specific fees to the student account based natively on the course catalog, term year, and individual course sections.
- **Dual-Enrollment (College Now) Pricing:** The financial engine must support highly customizable tuition rules, specifically the ability to apply reduced, flat-rate pricing (e.g., the specialized \$63 per-class rate) for high school students participating in the "College Now" dual-credit program.
- **Non-Credit Agility (Community Education):** The system must facilitate streamlined demographic collection and immediate point-of-sale fee collections for Community Education courses without requiring the generation of a traditional academic transcript or a multi-stage admissions process. Point-of-sale fee collections may also integrate with 3rd party services such as Square.
- **Charge Code Table:** The system must maintain a configurable table of charge types covering at minimum: credit tuition (by residency tier), non-credit tuition, College Now flat-rate tuition, mandatory fees (technology, student activity, parking), program-specific fees (clinical, lab, certification), housing charges, library and equipment fines, and miscellaneous charges. Each charge type must carry a GL account code mapping and a fund designation consistent with the college's ERP chart of accounts.
- **Residency-Based Rate Tiers:** The tuition rate table must support distinct per-credit rates for in-district, out-of-district, out-of-state, and international students. Rate tables must be maintainable by authorized staff without vendor intervention, and rate changes must not retroactively reprice students already enrolled in the current term.

- **Fee Waivers and Discounts:** The system must support a configurable waiver and discount framework covering employee tuition waivers, senior citizen waivers, veteran program waivers, and workforce program discounts (e.g., WorkSource Oregon, SNAP E&T, DVR). Each waiver type must require an authorization workflow (defining who may grant it), carry a GL account code for the offset, and produce a complete audit trail of who granted the waiver, when, and on what basis.
- **Charge Posting Timing:** Vendors must clearly describe when charges are posted to the student ledger — at registration, at census day, or on a configurable schedule — and how posting timing interacts with payment plan enrollment and financial holds.

Financial Aid Integration & Cash Management (Separation of Functions)

- **Financial Aid Platform Integration (Global Financial Services):** The system must support real-time or near-real-time bi-directional data sharing via API or secure SFTP with Global Financial Services (the college's financial aid platform). If real-time synchronization is not available, the system must allow upload of financial aid award data via CSV or spreadsheet. The direction, content, and frequency of each data exchange must be fully documented by the vendor.
- **Enrollment-to-Aid Trigger:** To preserve regulatory compliance, student financial data must automatically route to the financial aid portal only after a student is assigned the status of "*Applicant – Cleared to Register*," eliminating duplicate data entry.
- **Priority Order of Award Posting:** The system must feature a configurable rules engine to establish a strict priority order for posting student aid. Non-refundable Foundation or third-party scholarships must post to the student ledger prior to Title IV (federal) or other refundable aid types.
- **Scholarship Balance Tracking:** The system must actively track third-party and CGCC Foundation scholarship balances and push automated alerts to the Business Office regarding those balances prior to student disbursements.
- **Reconciliation & Trial Balance Compliance:** The financial module must strictly support federal Cash Management guidelines by maintaining a complete separation of functions between personnel who award aid and those who disburse funds. Ledgers must easily reconcile drawn-down Title IV funds to Account Receivables (AR) and the General Ledger Trial Balance (GLTB).
- **Aid Credit Posting:** The system must clearly define and support the workflow by which a financial aid award authorized in the financial aid module becomes a credit on the student ledger. Vendors must describe whether this posting is automatic or staff-triggered, how partial-term disbursements are handled (e.g., 50% at term start, 50% at midpoint), and how the system ensures aid credits reduce the student's outstanding balance before a refund is generated.
- **Student Refund Workflow:** When applied aid and other credits exceed a student's charges, the system must: automatically detect the resulting credit balance; route it to a staff review and approval queue; and upon approval, disburse via the student's configured method (direct deposit or check). If the student has an outstanding balance in

another category (e.g., a library fine), the system must flag this before refund issuance. A complete audit trail of refund approvals must be maintained.

- **Book Voucher and Charge-to-Account:** If the college elects to offer pre-disbursement bookstore charges against a student's aid (book vouchers), the system must support authorizing a charge at the bookstore (via Slingshot or similar integration), posting that charge to the student ledger, deducting it from the refundable aid balance, and reconciling with the bookstore at term-end.

ERP Transaction Export

- **Export Content:** The system must be capable of producing a transaction export to the college's ERP (currently Microsoft Dynamics 365) covering all student financial transaction types, including: tuition and fee charges, financial aid credits, cash receipts by payment method, student refund disbursements, fee waivers and adjustments, write-offs, and fund source postings. Vendors must provide a sample export file and a data dictionary describing each field.
- **GL Coding on Every Transaction:** Every transaction in the export must carry a complete GL coding string. The college's current ERP chart of accounts uses a multi-segment string structure including fund, account, function, department, and project dimensions. The SIS must support a configurable GL coding structure with at minimum four to five segments, sufficient to carry fund-level and project-level designations on every transaction. This is essential for grant and scholarship accountability: finance staff must be able to see in the ERP all transactions associated with a specific funding source or grant project without manual recoding.
- **GL Coding Table Maintenance:** The system must maintain a mapping table linking SIS charge types, payment types, waiver codes, and fund sources to the corresponding ERP GL coding string. This table must be maintainable by authorized finance staff either directly within the SIS or via import from the ERP. When GL codes change in the ERP, staff must be able to update the mapping without vendor involvement.
- **Export Frequency and Format:** The export must run on a configurable schedule (daily batch at minimum) and must be available on-demand. Vendors must support at least one of: direct API push to the ERP, SFTP file delivery, or CSV/Excel download. Vendors must describe what batch schedules are available and whether real-time posting is an option.
- **Fund Accounting Awareness:** The college operates under governmental fund accounting (GASB standards). The export must carry fund-level designations on every transaction so that entries land in the correct fund in the ERP without manual recoding by finance staff.
- **Export Error Handling and Reconciliation:** The system must maintain a log of all export runs, including records sent, date and time, and any errors encountered. Staff must be able to view export logs, identify failed transactions, correct and resubmit them, and produce a reconciliation report comparing what the SIS exported against what the ERP received.
- **SOC Report Disclosure:** Any vendor whose SIS performs or facilitates Title IV reconciliations, disbursements, NSLDS reporting, or other financial aid compliance functions must provide an annual SOC 1 Type II report (or equivalent) covering those

functions. Vendors must disclose in their proposal whether they have a current SOC 1 Type II report, the period it covers, and whether the college will receive a copy annually at no additional charge.

- **Reconciliation Accessibility:** Monthly Title IV reconciliation results (for Direct Loan, Pell, FSEOG, and FWS programs) must be accessible to college staff within the SIS or a directly linked portal. The system must not require staff to request reconciliation reports from the vendor — staff must be able to pull them independently at any time. This is required so the college can document its own review of the servicer’s work as an internal control.
- **Documented Review Workflow:** The system must support a review and sign-off workflow for monthly reconciliations, allowing a designated supervisor to mark a reconciliation as reviewed, record the date of review, and attach or reference any notes or exceptions. This sign-off record must be retained as audit evidence and must be retrievable without vendor assistance.

Fund Sources, Agency Billing, and Third-Party Sponsor Tracking

CGCC receives funding for students from a wide range of external agencies and programs, including but not limited to: tribal education departments, the Oregon Department of Vocational Rehabilitation (DVR), WorkSource Oregon, SNAP Employment and Training (SNAP E&T), veteran benefit programs beyond standard VA/GI Bill, employer tuition assistance programs, foundation scholarships, and various state and federal grant programs. The system must fully support this operational reality.

- **Fund Source Table:** The system must maintain a configurable fund source table. Each fund source record must carry: a description, the associated agency or program, and a GL account coding string aligned to the college’s ERP chart of accounts (see Section 5 for GL coding requirements). This table must be maintainable either by direct entry within the SIS or by import from the ERP, at the college’s discretion.
- **Applying a Fund Source to a Student Account:** Staff must be able to designate a fund source on a student’s account, indicating that a specific agency or program is expected to cover all or part of that student’s charges. The fund source designation must post as a credit to the student ledger with the associated GL coding, reducing the student’s balance accordingly.
- **Agency Invoicing:** The system must support the generation of invoices to external agencies and sponsors for the amounts designated to their students. The system must accommodate two common scenarios: (1) the college bills the agency after designating the fund source, and (2) the agency remits payment first, after which staff create and match the corresponding bill. In both cases, the system must track the invoice, the payment status, and any unpaid balance.
- **Unpaid Sponsor Balance:** If an agency fails to pay an invoiced amount, the system must flag the unpaid balance, allow staff to transfer it back to the student’s account if appropriate, and maintain an audit trail of the original designation and payment history.

- **Tracking and Reporting by Agency:** Staff must be able to produce a report or ledger view showing all students funded by a given agency in a given term, the amounts designated, amounts invoiced, and amounts received. This visibility is essential for reconciliation and grant reporting.

Automated Accountability, Holds, and Audits

- **Automated Financial Alerts:** The system must be configurable to place a restrictive financial hold on a student's account if a balance remains unpaid and always apply a financial alert; however, those holds must be easily removable for the effective blocking or opening of future registration and official transcript releases. The debt must always be trackable with the student account record.
- **Resource Accountability Triggers:** The system must integrate with the Learning Commons and Library to automatically trigger a financial account alert if high-value technology loans (such as laptops or hotspots) are lost, damaged, or unreturned by the end of a term. Once a replacement payment is executed in the Business Office, the transaction must instantly close out the alert within the SIS.
- **Credit Hour Auditing:** The system must perform automated credit hour audits that differentiate between degree-applicable and non-degree-applicable credits to guarantee that tuition collections and financial aid disbursements are legally compliant.
- **Return of Title IV (R2T4) & Attendance Links:** The student ledger must natively pull the Last Date of Attendance (LDA) and unofficial "FA" (unearned F) marks recorded by faculty to calculate precise tuition refunds and mandatory R2T4 federal repayments within the system.
- **Data Retention Schedules:** All financial records, ledger transactions, and synchronized financial aid audits must adhere to a strict data retention schedule of at least 6–7 years to comply with federal regulations.
- **Refund Schedule Configuration:** The system must support a configurable tuition refund schedule defining the percentage of charges reversed based on the number of days elapsed since the term start or the student's enrollment date (e.g., 100% refund in week 1, 80% in week 2, etc.). Refund schedules must be configurable by term and by course type (credit, non-credit, College Now). When a student drops a course or withdraws, the system must automatically calculate and post the appropriate credit to the student ledger without manual staff intervention, and must clearly show the refund calculation in the ledger detail.
- **Manual Adjustments and Write-Offs:** Authorized staff must be able to manually post credits, waive fees, or write off uncollectible balances on a student account. All manual adjustments must require: selection from a configurable reason code list, entry of a note, and role-based authorization limiting this function to designated staff. A complete, tamper-evident audit trail of all manual adjustments must be maintained and reportable.
- **1098-T Tuition Statement:** The system must generate IRS Form 1098-T (Tuition Statement) for all eligible students annually. This includes: automated population of Box 1 (payments received) and Box 5 (scholarships or grants) from ledger data; support for corrections and amended 1098-Ts; electronic delivery to students; and IRS e-filing or

production of a file in the IRS-required format. Vendors must specify whether 1098-T functionality is included in the base system or is a separately priced module.

Collections and Past-Due Account Management

- **Accounts Receivable Aging:** The system must produce an AR aging report showing all student account balances organized by aging bucket (current, 30, 60, 90+ days past due), filterable by term, program, and other relevant criteria.
- **Dunning Notices:** The system must support configurable automated past-due notices sent to students at defined intervals (e.g., 30, 60, 90 days past due), with escalating messaging. Notices must be personalized with the student's name, balance, and instructions for resolution.
- **Collections Referral Export:** The system must be able to produce a collections referral data export for accounts meeting defined criteria (e.g., balance over a threshold, past due more than 90 days, student no longer enrolled). The college's collection process involves referral to the State of Oregon; the system must support generating an export file in a format suitable for that referral process. (Optional: support for configurable export formats to accommodate future collections agency changes.)
- **Post-Collection Payment Posting:** When a payment is received following collections referral, staff must be able to post it to the original student account, close out the outstanding balance, and record the collections source.
- **Hold Granularity:** Financial holds must be configurable at a granular level. At minimum, the system must support separate hold types for registration, transcript release, and diploma release, with the ability to place or lift each independently. A hold note must be required when placing a hold, recording the reason and the staff member responsible.

Student Financial Self-Service Portal and Cashiering

Student-Facing Portal

- **Digital Payment Gateway:** The system must provide a secure, responsive, mobile-friendly student portal where students can view their real-time account ledger by term and cumulatively, review all charges and credits at the line-item level, and make payments online.
- **Payment Methods:** The portal must accept ACH/echeck and credit/debit card payments at minimum. Vendors must identify their integrated payment processor (the college currently uses Transact) and describe how the integration is maintained. Vendors must disclose whether credit card processing fees are absorbed by the system or passed to the student as a configurable convenience fee.
- **Payment Plans:** The system must support configurable installment payment plans. At minimum, plans must allow: definition of down-payment percentage and installment schedule, automatic payment drafting on scheduled dates, failed-payment handling (retry logic, late fee posting, student notification), and staff ability to manually modify a plan. A student enrolled in a current payment plan must not be blocked from registration solely on the basis of an unpaid balance so long as the plan is in good standing.

- **Automated Balance Notifications:** The system must send automated billing notices and balance reminders via email and SMS, configurable by event (e.g., new charge posted, payment due, payment received, refund issued, hold placed).
- **Electronic Direct Deposit:** The system must support electronic direct deposit configuration for student refunds and disbursements.

Third-Party and Authorized Payer Portal

- **Third-Party Payer Logins:** The system must support a separate authenticated login for authorized third-party payers — including parents, grandparents, employers, and other individuals the student designates — allowing them to view a student's account balance and make payments without access to the student's own credentials or other academic record information.
- **FERPA Compliance:** The student must be able to grant and revoke third-party payer access digitally within the system. The system must track the authorization, the date granted, and the scope of access, and must enforce it such that staff cannot release account information to an unauthorized party.

Cashiering and In-Person Payments

- **Staff Cashier Interface:** The system must provide a staff-facing cashiering interface allowing business office staff to post in-person payments to student accounts, recording payment method (cash, check, money order), amount, and the staff member posting the transaction.
- **Receipt Generation:** The system must generate a printed or emailed receipt for each payment transaction.
- **Daily Cash Close and Deposit Report:** The system must produce an end-of-day report summarizing all receipts by payment method, enabling staff to reconcile cash drawers and prepare daily bank deposits.
- **Returned Payment Handling:** The system must support returned payment processing (NSF/bounced ACH or check), including automatic reversal of the original payment on the student ledger, posting of a configurable returned-payment fee, and automated notification to the student.

System Integrations

To achieve the modernization goals of Columbia Gorge Community College (CGCC), the future Student Information System (SIS) cannot operate as an isolated data silo. Staff productivity and student success are heavily dependent upon a "silent," friction-free integration layer that bridges the gap between core student records and critical external platforms. Historically, the reliance on fragmented tracking methods—such as standalone PDFs, Jotform exports, and localized Excel spreadsheets—has created administrative bottlenecks, compromised data confidence, and forced staff into manual data "cleanup" cycles.

Delayed batch processing and data mismatches are the primary catalysts for systemic issues, including disruptive "Sign-In Loop" errors that lock faculty and students out of essential

applications at the start of an academic term. Therefore, the proposed SIS must guarantee real-time or near-real-time synchronization of student account statuses, demographic updates, and academic attributes.

Below is a list of current integrations and systems utilized by the college for the purpose of providing services to the student. The proposer must demonstrate their compatibility with the following list of potential integrations within their proposed Student Information System:

- **Identity and Authentication Management (Microsoft Entra ID):** Maintaining tight, immediate synchronization with Entra ID (formerly Azure AD) ensures that user profiles match perfectly, enforcing strong security layers like Two-Factor Authentication (2FA) and resolving access friction.
- **Learning Management System (Moodle / OpenLMS):** Real-time roster pushes and course shell provisioning must occur automatically the moment registration is completed, giving students instant access to course materials.
- **Student Self-Service Portal:** A secure, unified environment where students can update contact details, review real-time course-fee mapping on their student ledger, and execute self-service actions without staff intervention.
- **Financial Aid Services (Global Financial Aid Services Platform):** Financial aid processing requires a precise enrollment-to-aid trigger. The moment an applicant is assigned the status of "*Applicant - Cleared to Register*," relevant student details must flow securely via API or compliant SFTP to the financial aid tool. This automated handoff protects Title IV compliance and eliminates redundant manual data entry.
- **Specialized Student & Campus Support Modules:** Bidirectional data exchange must extend to essential niche solutions, including **Disability Services (AIM)** for accessibility coordination, the **Bookstore (Slingshot)** for immediate material resource alignment, and the **Athletics Module**.
- **Web Intake and Internal Tracking Overhauls (Jotform & Housing):** The system must natively consume inbound data from external collection tools like **Jotform**. Furthermore, the system must replace the legacy, paper-and-spreadsheet-based **Housing Tool** by converting those workflows into a natively tracked, audit-ready SIS housing module.

Artificial Intelligence Capabilities & Integration (Optional)

This section outlines the optional technical specifications, functional criteria, and security requirements for integrating Artificial Intelligence (AI) frameworks within the future-state Student Information System (SIS).

Columbia Gorge Community College (CGCC) seeks an architectural vision that moves beyond traditional deterministic software architectures into modern intelligent computing environments. Proposers are encouraged to demonstrate how native or modular AI integration can diminish manual administrative burdens, eliminate repetitive data entry cycles, optimize cross-departmental workflows, and drive inclusive student success in full alignment with the college's equity framework. The functions must follow best practice, Human-In-The-Loop processes prior to any data manipulation or adjustment.

CGCC is evaluating advanced system architectures capable of deploying autonomous "agents"—software entities programmed to perceive events, cross-analyze multiple software environments, determine execution strategies, and trigger multi-step workflows with continuous human intervention (human-in-the-loop). These agentic models must act as proactive, behind-the-scenes monitors to prevent operational bottlenecks before they disrupt the student lifecycle.

Key agentic functions (optional)

- **Automated Lifeline Intervention Triggers:** Autonomous monitoring networks that analyze Moodle engagement logs, course attendance flags, and financial ledger items. If an identity shifts into a "Stalled" status or falls below mandatory credit intensity levels, the agent must autonomously coordinate an intervention track—generating an advising meeting alert, pausing pending financial disbursements to prevent compliance failures, and queuing a localized communication package.
- **Intelligent Application Vetting and Fraud Defense:** Automated screening agents that intercept incoming web intake records. Instead of matching static fields, the agent evaluates application metadata (IP geolocation anomalies, physical address syntax validation via public records repositories, and phone numbers) to dynamically assign a legitimacy probability rating, flagging suspicious applications for rapid administrative review.
- **Bi-Directional Compliance Reconciliation Agents:** Automated background processes that actively cross-reference internal SIS student ledgers with external source-of-truth networks (such as Global Financial Services or the National Student Loan Data System). If an instructional record or residency tier shifts, the agent automatically runs a predictive delta calculation and stages a formal supervisory adjustment queue.

Generative Conversational User Interface (optional)

- **Staff and Advisor Text Modification and Composition Copilots:** Native text areas embedded within case management and advising portals should empower authorized staff to type natural language generative prompts (e.g., "Draft an individualized, trauma-informed email notification for a first-generation student who missed their advising appointment by 7 days, providing direct links to the Hood River campus scheduling tool and veteran support office"). The prompt utility should automatically ingest the student's demographic details securely to personalize the message without exposing PII.
- **Conversational Navigation Overlays:** An interactive, security-permissioned natural language overlay for administrative staff that replaces complex navigation pathways. Staff should be able to instruct the interface via typed prompts (e.g., "Open the Airframe Certificate fee mapping matrix for the 2025-26 academic year and show me the active lab charge code overrides") to pull up the required module immediately.
- **Intelligent Student-Facing Portal Assistants:** Secure, chat-based portal layers that assist students with technical self-service actions. The assistant should interpret

colloquial natural language requests (e.g., "I need to add the linked lab section to my writing schedule and sign up for an electronic direct deposit refund plan") and accurately guide the student through the process without staff intervention.

- **Conversational Data Pulling:** Institutional researchers and department heads should be able to generate complex, multi-segment reports using unstructured text entries (e.g., "Generate a sorted list of all Hispanic-Serving Institution (HSI) credit students who receive Pell grants, maintain a cumulative GPA below 2.5, are enrolled part-time, and carry an outstanding balance in their student accounts over \$500"). The processing layer should translate this request, outputting a clear, reportable data grid.
- **Automated Textual Summarization of Compliance Metrics:** The system must be capable of processing raw data matrices—such as Satisfactory Academic Progress (SAP) reviews, Return of Title IV (R2T4) workloads, or Accounts Receivable (AR) aging buckets—and summarizing them into plain-language summaries for executive decision-making.
- **Semantic Academic Record Retrieval:** The search framework should look past basic database strings to find related information across advising logs, case histories, transfer credit transcripts, and demographic tags. Typing "Students experiencing enrollment preparation issues in CTE courses" should contextually pull up records of students flagged for missing course prerequisites or stalled registration checkpoints within programs like Aviation Maintenance or Nursing.
- **Advanced Multi-Variant Fuzzy Match Alignment:** Integrating algorithmic vector search logic that seamlessly unites disparate spellings, variations in pronoun tags, high school tracking data, and complex student naming conventions to ensure duplicate profiles are identified across all incoming streams.

Security, Privacy, and Federal Regulatory Compliance Baseline

Any integrated AI capability must adhere to strict security baselines to preserve institutional compliance with federal and state regulatory bodies, including FERPA, Oregon Administrative Rules (OAR), and the Oregon Student Information Protection Act (OSIPA):

- **Data Privacy Isolation Boundaries:** No student data, transcript record, financial metric, or PII can be transmitted to external, public cloud large language models or used to train public commercial models. All processing layers must use local, sandboxed enterprise instances.
- **Field-Level Role-Based Access Control (RBAC) Enforcement:** Generative prompts and natural language report engines must strictly enforce existing field-level security permissions. If a user's role prevents them from viewing sensitive metrics (such as Social Security Numbers, disciplinary files, or professional judgment aid records), the AI processing engine must filter those parameters entirely from its natural language outputs and summaries.
- **Tamper-Evident Prompt Auditing Logs:** The system must maintain an immutable log recording every prompt submitted, the identity of the staff member or student executing the query, the data fields accessed, and the generated textual output to ensure comprehensive compliance auditing.

Glossary of Terms and Definitions

Statutory and Institutional Definitions

- **College:** Columbia Gorge Community College (CGCC), a public two-year community college operating in the state of Oregon.
- **Project:** The procurement, configuration, implementation, data migration, and long-term support required to completely replace the college's legacy system with a modern technology architecture.
- **System:** The single, commercially available off-the-shelf software natively integrated as a unified Student Information System (SIS) that enables seamless data sharing and legal records retention across the college and all partner agencies.
- **System Contractor:** The successful proposer awarded the contract pursuant to this competitive RFP process.
- **Technical Architecture:** A detailed system specification containing the narrative and visual representations of the design, functionality, database structure, security baselines, and integration layers of the proposed solution.
- **Users:** Authorized College staff, faculty, administrators, advisors, and students utilizing the system interfaces.

Academic and Student Lifecycle Statuses

- **Academic Journey Templates:** Digital "plug-and-play" program or academic pathway maps that dictate exactly which credits and milestones a student must achieve based natively on their catalog year.
- **College Now:** CGCC's high school partnership program allowing eligible secondary students (primarily juniors and seniors) to earn dual credit for approved courses taught by certified high school instructors during regular school hours.
- **Community Education:** Agility-focused, fee-based non-credit and specialized training courses designed for adult learners and community members which do not generate traditional academic transcripts.
- **Prospect:** An individual who has expressed initial interest in the college but has not yet formally submitted an admission application.
- **Applicant:** A prospective student who has formally submitted an admission application to the college but has not yet completed the placement and mandatory advising milestones.
- **Applicant - Cleared to Register:** An intentional system status assigned to a student who has completed basic vetting and placement, but must clear a mandatory advising gatekeeper prior to actively enrolling in courses.
- **Stalled Status:** An automated operational status flagging a student who has fully registered for courses but has zero recorded class attendance or Moodle interaction, triggering proactive intervention or financial aid recalculation.

- **Withdrawn Prior Decision:** A lifecycle status for an applicant who formally terminates their application process before an official acceptance or denial decision is executed by the college.
- **Withdrawn After Decision:** A status applied to a formally accepted or actively enrolled student who officially withdraws from a course or the institution, typically triggering a "W" mark on their transcript.
- **Completed:** The final student lifecycle status assigned once a student satisfies all programmatic degree audit parameters and is formally awarded a degree or short-term certificate.

Financial Aid and Technical Terms

- **2FA (Two-Factor Authentication):** A security identity verification setting requiring users to supply two distinct pieces of evidence before accessing the SIS, managed centrally via identity providers.
- **AIM (Accessible Information Management):** The specialized third-party software platform utilized by the Disability Services department to track student accommodations.
- **API (Application Programming Interface):** A set of protocols and modern web standards (e.g., REST, OAuth 2.0) that allows distinct software applications to securely exchange data bi-directionally in real-time.
- **CEEB Code:** A unique, standardized identification number assigned to secondary and postsecondary institutions by the College Board, utilized to verify incoming academic history records.
- **CLO / ILO (Course & Institutional Learning Outcomes):** Concrete benchmarks measuring what students are expected to know or perform upon completing a course or graduating, which must link natively to grading or assessment summaries.
- **Conclusive Advisor:** The college's specialized secondary degree audit and student planning tool that relies on seamless data integration with core SIS student records.
- **CourseStorm:** The external catalog and registration software platform currently utilized to process rosters and point-of-sale collections for non-credit Community Education courses.
- **ERP (Enterprise Resource Planning):** The underlying administrative financial accounting structure dealing with complex institutional financials, general ledger accounts, and business services operations.
- **FA Grade:** A specialized, unearned "F" mark explicitly recorded by faculty to delineate students who have unofficially withdrawn or abandoned coursework without completing a formal withdrawal process.
- **FAFSA / ORSAA:** The *Free Application for Federal Student Aid* and *Oregon Student Aid Application*, respectively; the regulatory forms filled out by students to establish baseline financial aid eligibility.
- **FERPA (Family Educational Rights and Privacy Act):** The federal law protecting the privacy of student educational records, strictly mandating field-level Role-Based Access Controls (RBAC) and explicit tracking of external PII disclosures.

- **Fuzzy Match:** An algorithmic data matching logic capable of identifying existing student accounts based on partial string similarities, preventing duplicate entries caused by typos or inconsistent hyphenated names.
- **GLTB / AR:** *General Ledger Trial Balance* and *Account Receivables*, respectively; standard corporate financial balances to which disbursed student ledger accounts must be reconciled.
- **HECC / OSAC:** The *Higher Education Coordinating Commission* and *Office of Student Access and Completion*; state-level Oregon entities overseeing community college reporting, approvals, and state-funded financial aid rosters.
- **ISIR (Institutional Student Information Record):** The formal electronic data package sent to colleges containing calculated federal financial aid parameters, including the student's *Student Aid Index (SAI)*.
- **LDA (Last Date of Attendance):** The exact, auditable date an instructor notes a student last participated in an academic course component, directly governing tuition refund windows and financial aid clawbacks.
- **Moodle / OpenLMS:** The central Learning Management System (LMS) utilized by CGCC faculty to deliver course materials, manage digital assignments, and post grades.
- **Microsoft Entra ID:** CGCC's central identity, access, and authentication platform (formerly Azure Active Directory) acting as the authoritative Single Sign-On (SSO) engine.
- **NSLDS / NSC:** The *National Student Loan Data System* and *National Student Clearinghouse*; federal and industry reporting entities to which the SIS must generate standardized enrollment and degree tracking extract files.
- **OAR / ORS:** *Oregon Administrative Rules* and *Oregon Revised Statutes*; the strict administrative and state statutory legal framework governing college operational rules, procurement protests, records retention schedules, and tax laws.
- **PII (Personally Identifiable Information):** Highly sensitive, protected student data fields (e.g., Social Security Numbers, dates of birth, personal contact data) requiring mandatory encryption both in transit and at rest.
- **R2T4 (Return of Title IV Funds):** Regulatory financial aid calculations executed within the SIS to determine the exact portion of federal grants or loans an institution or student must return to the federal government following an official or unofficial withdrawal prior to reaching the 60% term completion milestone.
- **SAP (Satisfactory Academic Progress):** The strict federal qualitative (cumulative GPA) and quantitative (maintaining a minimum 66.7% credit completion pace within a 150% maximum timeframe) standards a student must maintain to preserve their financial aid eligibility.
- **Slingshot:** The external administrative bookkeeping and resource logistics system utilized to manage bookstore inventory and track student book materials ordering.

Appendix

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Appendix A: Sample Professional Services Agreement

**Columbia Gorge Community College
(CGCC)**

PROFESSIONAL SERVICES AGREEMENT

_____ **Services**

THIS AGREEMENT is between Columbia Gorge Community College, an Oregon political subdivision (“College”), and _____ (“Contractor”). This Agreement shall be effective when signed by both parties.

RECITALS

- A. Contractor has the training, ability, knowledge, and experience to provide Services desired by the College.
- B. College selected Contractor to provide Services pursuant to a solicitation process consistent with its public contracting rules.
- C. The Services described below are to be provided by the Contractor.

AGREEMENT

1. Services to be Provided

Contractor shall provide College with services as outlined in Addendum A and as requested by College for _____ (the “Services”).

2. Term

The term of this Agreement is effective _____, and shall remain in effect until _____

3. Compensation

- a. Services are billed monthly and /or at completion of phases as set forth in more detail in Exhibit A.
- b. Under no circumstance shall Contractor shall bill College for more than the

Maximum Fee (and College shall have no obligation to pay more than the Maximum Fee) of \$

4. Assignment/Delegation

Neither party shall assign or transfer any interest in or duty under this Agreement without the written consent of the other.

5. Status of Contractor as Independent Contractor

Contractor certifies that:

- a. Contractor acknowledges that Contractor is an independent contractor as defined by ORS 670.600 and not an employee of College, shall not be entitled to benefits of any kind to which an employee of College is entitled and shall be solely responsible for all payments and taxes required by law. Furthermore, in the event that Contractor is found by a court of law or any administrative agency to be an employee of College for any purpose, College shall be entitled to offset compensation due, or to demand repayment of any amounts paid to Contractor under the terms of this Agreement, to the full extent of any benefits or other remuneration Contractor receives (from College or third party) as a result of the finding and to the full extent of any payments that College is required to make (to Contractor or to a third party) as a result of the finding.
- b. Contractor represents that no employee of the College, or any partnership or corporation in which a College employee has an interest, has or will receive any remuneration of any description from Contractor, either directly or indirectly, in connection with this Agreement, except as specifically declared in writing.
- c. Contractor is not an officer, employee, or agent of the College as those terms are used in ORS 30.265.

6. Indemnification

- a. CLAIMS FOR OTHER THAN PROFESSIONAL LIABILITY. CONTRACTOR SHALL INDEMNIFY, DEFEND, SAVE, AND HOLD HARMLESS COLLEGE AND ITS OFFICERS, AGENTS, AND EMPLOYEES, FROM AND AGAINST ALL CLAIMS, SUITS, ACTIONS, LOSSES, DAMAGES, LIABILITIES, COSTS AND EXPENSES OF WHATSOEVER NATURE RESULTING FROM OR ARISING OUT OF THE ACTS OR OMISSIONS OF CONTRACTOR OR ITS SUB-CONTRACTORS, SUBCONTRACTORS, AGENTS, OR EMPLOYEES UNDER THIS CONTRACT.
- b. CLAIMS FOR PROFESSIONAL LIABILITY. CONTRACTOR SHALL

INDEMNIFY, DEFEND, SAVE, AND HOLD HARMLESS COLLEGE AND ITS OFFICERS, AGENTS, AND EMPLOYEES, FROM AND AGAINST ALL CLAIMS, SUITS, ACTIONS, LOSSES, DAMAGES, LIABILITIES, COSTS AND EXPENSES OF WHATSOEVER NATURE ARISING OUT OF THE PROFESSIONALLY NEGLIGENT ACTS, ERRORS OR OMISSIONS OF CONTRACTOR OR ITS SUB CONTRACTORS, SUBCONTRACTORS, AGENTS, OR EMPLOYEES IN THE PERFORMANCE OF PROFESSIONAL SERVICES UNDER THIS CONTRACT.

7. Insurance

Contractor shall not commence any work until Contractor obtains, at Contractor's own expense, all required insurance as specified in attached **Addendum B**. The procuring of required insurance shall not be construed to limit Contractor's liability under this Agreement. Notwithstanding said insurance, Contractor shall be obligated for the total amount of any damage, injury, or loss caused by negligence or neglect connected with this Agreement.

8. Method and Place of Submitting Notice, Bills and Payments

All notices, bills and payments shall be made in writing and may be given by personal delivery or mail. Payments may be made by personal delivery, mail, or electronic transfer. The following addresses shall be used to transmit notices and other information:

College:

President
400 East
Scenic Drive
The Dalles,
OR 97058

Contractor:

X
X
X
X
X
X
X
X
X
X
X

Notices mailed to the address provided for notice in this section shall be deemed given upon deposit in the United States mail, postage prepaid. In all other instances, notices, bills and payments shall be deemed given at the time of actual delivery.

9. Merger

This writing is the final expression of the agreement between the parties with respect to the included terms and as a complete and exclusive statement of the terms of the agreement. No modification of this Agreement shall be effective unless and until it is made in writing and signed by both parties.

10. Ownership of Work Documents

All work performed by Contractor and compensated by College pursuant to this Agreement shall be the property of College upon full compensation for that work performed or document produced to Contractor, and it is agreed by the parties that such documents are works made for hire. Contractor hereby conveys, transfers and grants to College all rights of reproduction and the copyright to all such documents.

11. Labor and Material

Contractor shall provide and pay for all labor, materials, equipment, tools, transportation, and other facilities and Services necessary for the proper execution and completion of all contract work, all at no cost to College other than the compensation provided in this Agreement.

12. Termination for Convenience

This Agreement may be terminated by either party for convenience by giving thirty(30) days' prior written notice of intent to terminate, without waiving any claims or remedies it may have against the other. Upon termination under this paragraph, Contractor shall be entitled to payment in accordance with the terms of this Agreement for contract work completed and accepted before termination less previous amounts paid and any claim(s) College has against Contractor. Pursuant to this paragraph, Contractor shall submit an itemized invoice for all unreimbursed contract work completed before termination and all contract closeout costs actually incurred by Contractor. College shall not be liable for any costs invoiced later than thirty (30) days after termination unless Contractor can show good cause beyond its control for the delay.

13. Termination for Cause

College may terminate this Agreement upon delivery of seven (7) days' written notice to Contractor, or at such later date as may be established by College, under any of the following conditions:

- A. If College funding is not obtained and continued at levels sufficient to allow for purchases of the indicated quantity of Services. This Agreement may be modified to accommodate a reduction in funds.
- B. If federal or state regulations or guidelines are modified, changed, or interpreted in such a way that the Services are no longer allowable or appropriate for purchase under this Agreement or are no longer eligible for the funding proposed for

payments authorized by this Agreement.

- C. If any license or certificate required by law or regulation to be held by Contractor to provide the Services required by this Agreement is for any reason denied, revoked, or not renewed.

14. Termination for Default

Either College or Contractor may terminate this Agreement in the event of a breach of this Agreement by the other. Prior to such termination, the party seeking termination shall give to the other party written notice of the breach and intent to terminate. If the party committing the breach has not entirely cured the breach within fifteen (15) days of the date of the notice, then the party giving the notice may terminate this Agreement at any time thereafter by giving a written notice of termination.

If Contractor fails to perform in the manner called for in this Agreement or if Contractor fails to comply with any other provisions of this Agreement, College may terminate this Agreement for default. Termination shall be effected by serving a notice of termination on Contractor setting forth the manner in which Contractor is in default. Contractor shall be paid the contract price only for Services performed in accordance with the manner of performance as set forth in this Agreement.

15. Remedies

In the event of breach of this Agreement the parties shall have the following remedies:

- A. If terminated under paragraph 14 by College due to a breach by Contractor, College may complete the work either itself, by agreement with another contractor, or by a combination thereof. In addition to the above remedies for a breach by Contractor, College also shall be entitled to any other equitable and legal remedies that are available.
- B. If College breaches this Agreement, Contractor's remedy shall be limited to termination of this Agreement and receipt of contract payments to which Contractor is entitled.
- C. College shall not be liable for any indirect, incidental, consequential, or special damages under this Agreement or any damages arising solely from terminating this Agreement in accordance with its terms.
- D. Upon receiving a notice of termination, and except as otherwise directed in writing by College, Contractor shall immediately cease all activities related to the Services and work under this Agreement. As directed by College, Contractor shall, upon termination, deliver to College all then existing work product that, if this Agreement had been completed, would be required to be delivered to College.

16. Nondiscrimination

During the term of this Agreement, Contractor shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, age, or national origin.

17. Governing Law; Jurisdiction; Venue

This Agreement shall be governed by and construed in accordance with the laws of the state of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively "Claim") between College and Contractor that arises from or relates to this Agreement which results in litigation shall be brought within the Circuit Court of Wasco for the state of Oregon; provided, however, if a Claim must be brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States Court for the State of Oregon.

18. Compliance with Laws and Regulations

Contractor shall comply with all state and local laws, regulations, executive orders and ordinances applicable to this Agreement or to the delivery of Services hereunder.

19. Experience, Capabilities and Resources

By execution of this Agreement, the Contractor agrees that Contractor has the skill, legal capacity, and professional ability necessary to perform all the Services required under this Agreement, and Contractor has the capabilities and resources necessary to perform the obligations of this Agreement.

20. Access to Records

For not less than three (3) years after the expiration of this Agreement and for the purpose of making audit, examination, excerpts, and transcripts, College, and its duly authorized representatives shall have access to Contractor's books, documents, papers, and records that are pertinent to this Agreement. If, for any reason, any part of this Agreement, or any resulting construction contract(s) is involved in litigation, Contractor shall retain all pertinent records for not less than three years or until all litigation is resolved, whichever is longer. Contractor shall provide full access to these records to College, and its duly authorized representatives in preparation for and during litigation.

21. Representations and Warranties

Contractor represents and warrants to College that (1) Contractor has the power and authority to enter into and perform this Agreement, (2) when executed and delivered, this Agreement shall be a valid and binding obligation of Contractor enforceable in accordance with its terms, (3) Contractor shall, at all times during the term of this Agreement, be duly licensed to perform the Services, and if there is no licensing requirement for the profession or Services, be duly qualified and competent, (4) the Services under this Agreement shall be performed in accordance with the professional skill, care and standards of other professionals performing similar services under similar conditions, and

(5) the Contractor is not in violation of any Oregon tax laws. The warranties set forth in this section are in addition to, and not in lieu of, any other warranties provided.

22. Attorney Fees

In case a suit or action is instituted to enforce the provisions of this Agreement, the parties agree that the losing party shall pay such sums as the court may adjudge reasonable for attorney fees and court costs, including attorney fees and costs on appeal.

23. Confidentiality

During the performance of the Agreement and for all time subsequent to completion of the Services under this Agreement, the Contractor agrees not to use or disclose to anyone, except as required by the performance of this Agreement or by law, or as otherwise authorized by the College, any and all information given to the Contractor by the College or developed by the Contractor as a result of the performance of this Agreement. The Contractor agrees that if the College so requests, the Contractor will execute a confidentiality agreement in a form acceptable to the College and will require any employee or sub-Contractor performing work under this Agreement or receiving any information deemed confidential by the College to execute such a confidentiality agreement.

24. Force Majeure

Contractor shall not be deemed in default hereof nor liable for damages arising from its failure to perform its duties or obligations hereunder if such is due to causes beyond its reasonable control, including, but not limited to, acts of God, acts of civil or military authorities, fires, floods, windstorms, pandemic, earthquakes, strikes or other labor disturbances, civil commotion or war.

25. Waivers

No waiver by College of any provision of this Agreement shall be deemed to be a waiver of any other provision hereof or of any subsequent breach by Contractor of the same or any other provision. College's consent to or approval of any act by Contractor requiring College's consent or approval shall not be deemed to render unnecessary the obtaining of College's consent to or approval of any subsequent act by Contractor, whether or not similar to the act so consented to.

26. Severability

Any provisions of this Agreement which shall prove to be invalid, void or illegal shall in no way affect, impair or invalidate any other provision hereof, and such remaining provisions shall remain in full force and effect.

27. Headings

The captions contained in this Agreement are for convenience only and shall not be considered in the construction or interpretation of any provision hereof.

28. Integration

This Agreement, including the attached exhibits contains the entire agreement between the parties regarding the matters referenced herein and supersedes all prior written or oral discussions or agreements regarding the matters addressed by this Agreement.

29. Amendments

This Agreement shall not be waived, altered, modified, supplemented, or amended in any manner without a duly executed Amendment.

30. Authority

The representatives signing on behalf of the parties certify that they are duly authorized by the party for which they sign to make this Agreement.

Columbia Gorge Community College

By: _____

Name: _____

Title: _____

By: _____

Name: _____

Title: _____

Appendix B: Sample Insurance Provisions

THIS ADDENDUM “B” is made a part of that certain agreement between Columbia Gorge Community College, an Oregon political subdivision (“College”), and _____ (“Contractor”) dated _____, 2026 (the “Agreement”). The following terms are hereby incorporated into the Agreement:

1. Insurance. Contactor shall provide all insurance called for below under the heading “Insurance Coverage Required.” As evidence of the insurance coverages required by the Agreement, the Contractor shall furnish a certificate of insurance to College. The certificate will specify parties who are Additional Insured and must include a notice provision regarding cancellations. Insurance coverages required under the Agreement shall be obtained from insurance companies authorized to do business in the State of Oregon.

2. Insurance Coverage Required. Contractor shall not commence any work until Contractor obtains, at Contractor’s own expense, all required insurance as specified below. Such insurance must have the approval of Columbia Gorge Community College (CGCC) as to limits, form and amount. The types of insurance Contractor is required to obtain or maintain for the full period of the Agreement will be:

- a. **COMMERCIAL GENERAL LIABILITY** insurance coverage with a combined single limit of not less than \$2,000,000 for personal injury, bodily injury, advertising injury, property damage, premises, operations, products, completed operations and contractual liability. The insurance coverages provided for herein must be endorsed as primary and non-contributory to any insurance of College, its officers, employees or agents. Each such policy obtained by Contractor shall provide that the insurer shall defend any suit against the named insured and the additional insureds, their officers, agents, or employees, even if such suit is frivolous or fraudulent. Such insurance shall provide College with the right, but not the obligation, to engage its own attorney for the purpose of defending any legal action against College, its officers, agents, or employees, and that Contractor shall indemnify College for costs and expenses, including reasonable attorneys’ fees, incurred or arising out of the defense of such action. The policy shall be endorsed to name Columbia Gorge Community College (CGCC), its officers, agents, employees and volunteers as an additional insured. The additional insured endorsement shall not include declarations that reduce any per occurrence or aggregate insurance limit. The Contractor shall provide additional coverage based on any outstanding claim(s) made against policy limits to ensure that minimum insurance limits required by the College are maintained. Construction contracts may include aggregate limits that apply on a “per location” or “per project” basis. The additional insurance protection shall extend equal protection to College as to Contractor or subcontractors and shall not be limited to vicarious liability only or any similar limitation. To the extent any aspect of this Paragraph shall be deemed unenforceable, then the additional insurance protection to College shall be narrowed to the maximum amount of protection allowed by law.
- b. **PROFESSIONAL LIABILITY** for Errors and Omissions coverage in the amount of not less than two million dollars (\$2,000,000) combined single limit for each occurrence and two million dollars (\$2,000,000) aggregate. If Contractor sub-contracts in support of Contractors work provided for in the agreement, Professional Liability Insurance for Errors shall be provided by the sub-contractor in an amount not less than one million dollars (\$1,000,000) in aggregate. The insurance coverage provided by the Contractor shall contain language providing coverage up to one (1) year following completion of the contract in order to provide insurance coverage for the hold harmless provisions herein if the policy is a claims made policy.
- c. **AUTOMOBILE LIABILITY** insurance coverage with a combined single limit of not less than one million \$1,000,000 for bodily injury and property damage resulting from operation of a motor vehicle. Commercial Automobile Liability Insurance shall provide coverage for any motor vehicle driven by or on behalf of Contractor during the course of providing Service under the Agreement. Commercial Automobile Liability is required for contractors that own business vehicles registered to the business. Examples include: plumbers, electricians or construction contractors. An example of an

acceptable personal automobile policy is a contractor who is a sole proprietor that does not own vehicles registered to the business.

- d. CYBER LIABILITY insurance coverage in the amount of no less than \$2,000,000 combined single limit coverage for each occurrence for any single claimant and \$4,000,000 for each occurrence for multiple claimants covering network security, breach of data, and coverage for regulatory fines and fee imposed against College due to failures in products and services provided under this Contract. Cyber Liability must include errors, omissions, negligent acts, denial of service, media liability (including software copyright), dishonesty, fraudulent or criminal acts by a person or persons whether identified or not, intellectual property infringement, computer system attacks, unauthorized access and use of computer system, regulatory actions, and contractual liability.
- e. WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY as statutorily required for persons performing work under the Agreement. Any subcontractor hired by Contractor shall also carry Workers' Compensation and Employers' Liability coverage.
- f. ADDITIONAL INSURED PROVISIONS. The Commercial General Liability Insurance and other policies the College deems necessary shall include the College as an additional insured with respect to the Agreement.
- g. SUBROGATION. Contractor grants Waiver of Subrogation to the College, its officers, agents, employees and volunteers for any claims arising out of Contractor's work or service. Contractor also grants to College on behalf of any insurer providing coverage to either Contractor or College with respect to the work or services of Contractor a waiver of any right to subrogation which any insurer or Contractor may acquire against College by virtue of the payment of any loss under such insurance coverage.
- h. NOTICE OF CANCELLATION. There shall be no cancellation, material change, exhaustion of aggregate limits or intent not to renew insurance coverage without 30 days written notice to the College. Any failure to comply with this provision will not affect the insurance coverage provided to the College. The certificates of insurance provided to the College shall state that the insurer shall endeavor to provide 30 days' notice of cancellation to the College.
- i. CERTIFICATES OF INSURANCE. As evidence of the insurance coverage required by the Agreement, the Contractor shall furnish a Certificate of Insurance to the College. No contract shall be effected until the required certificates have been received and approved by the College. The certificate will specify and document all provisions within the Agreement. A renewal certificate will be sent to the above address no less than 10 days prior to coverage expiration.
- j. PRIMARY COVERAGE CLARIFICATION. The parties agree that Contractor's coverage shall be primary to the extent permitted by law. The parties further agree that other insurance maintained by the College is excess and not contributory insurance with the insurance required in this section.

The procuring of required insurance shall not be construed to limit Contractor's liability under the Agreement. Notwithstanding said insurance, Contractor shall be obligated for the total amount of any damage, injury, or loss caused by negligence or neglect connected with the Agreement.

Appendix C: Sample Cost Proposal

I, _____, representing the firm of _____, do hereby agree to provide a fully functioning Student Information System for Columbia Gorge Community College (CGCC) as per the Scope of Work and Proposal specifications, in accordance with the requirements set forth in the Proposal specifications. My Proposal prices shall include all charges / pricing as follows:

Offeror shall provide an itemized cost proposal for the Student Information System for Columbia Gorge Community College (CGCC) as described within this RFP and detailed in the Requirements.

The itemized cost proposal shall be attached to the Proposal. All itemized pricing shall be combined for a set firm fixed fee for all services. This fee proposal shall reflect the total cost for provision of all services and on-going maintenance/support, described herein. Evaluations will be based on a total 5-year cost for the services described herein. The fee will be firm and fixed for the initial 12-month period after full implementation and acceptance with subsequent annual periods to be quoted as firm fixed annual maintenance fees. It is understood that any future changes to the Scope of Work will be negotiated, but proposed fees shall be firm on an annual basis for the first five years given anticipated escalation and growth factors affecting the work. The proposing Offeror shall submit any conditions or pricing terms related to on-going service after the quoted 5-year period.

A. Project Pricing: All Systems and Services Total Base Cost for Implementation of all systems, including training, configuration, integrations, and data migration:

B. Yearly Maintenance and Support Fees

Term Annual Fee
Year 1 \$
Year 2 \$
Year 3 \$
Year 4 \$
Year 5 \$
Total 5-year Cost: \$
Ongoing pricing terms beyond five years:

The undersigned declares that it has carefully examined the Request for Proposal Specifications and has carefully examined the documents, site and requirements related to the proposed services. Vendor agrees to provide all the necessary management, technology, and services significant and incidental to the Scope of Work and will provide for all the work described in the Specifications.

_____ Date Authorized Signature
 _____ Name (typed or printed)
 _____ Name of Firm