

Ohio Bursars Association Meeting Fall 2019 Conference

October 2, 2019



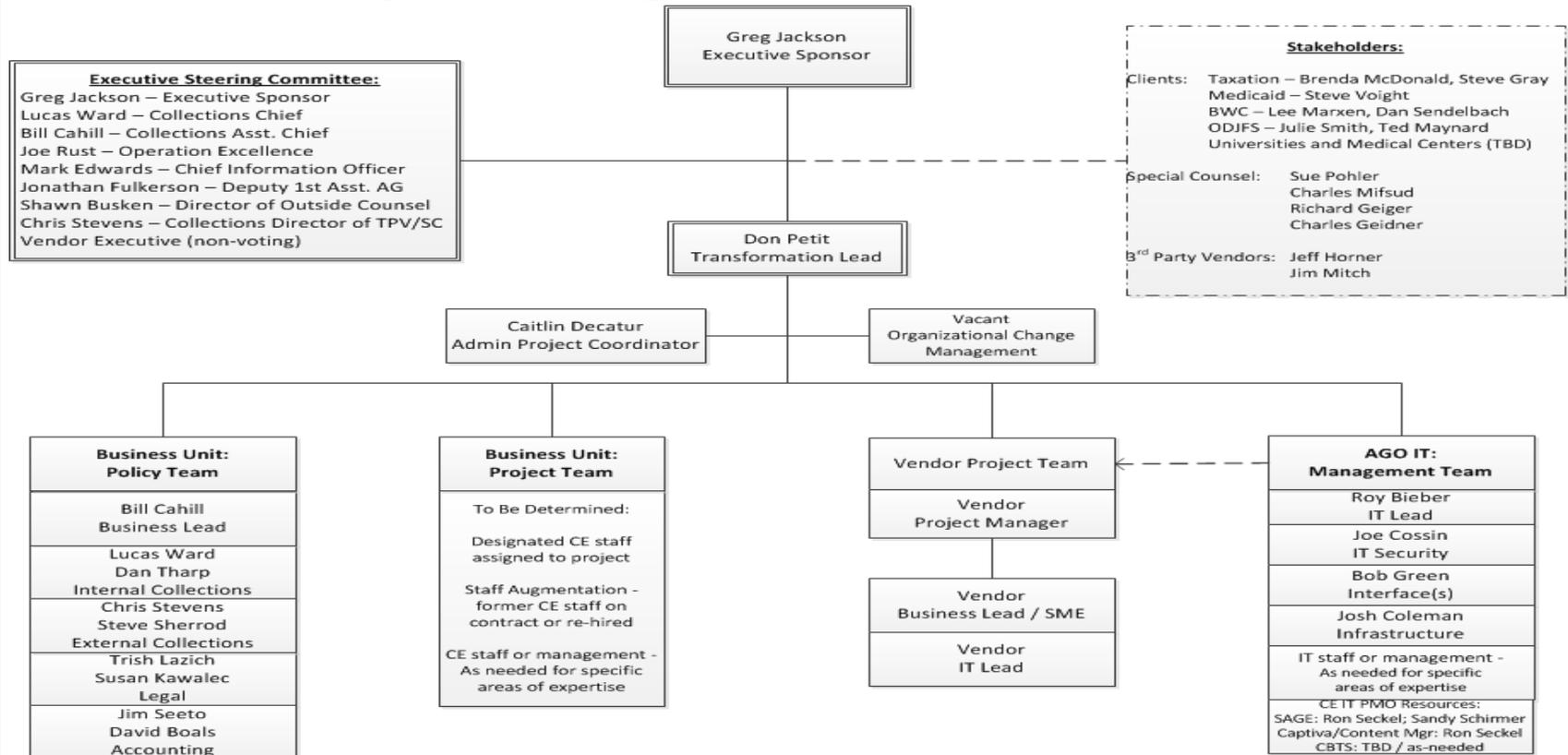
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Collections Modernization Project Overview

- New Collections Software
- Organizational Change Management
- The Collections “Eco-System”
 - Accounting Software
 - VOIP / IVR Telephone Upgrade
 - Payment Portal

Project Organizational Chart





Request for Proposals (RFP) for New Collections System

- Scope of work covers both Implementation and Operations
- Required Responses from Bidder
 - Volume I: Vendor Management Proposal
 - Volume II: Vendor Technical Proposal (Implementation)
 - Volume III: Vendor Cost Proposal



Differences from Previous Attempt

- Emphasis on ability to implement
- This is demonstrated several ways, including:
 - Software provider also implements or is responsible to select / partner with implementation vendor
 - Ensures implementer has product familiarity
 - Previous process allowed an implementer to select a product, regardless of experience with that product



Differences (continued)

- Scoring:
 - 50% of proposal score is tied to the technical proposal for implementation and operation of NCS
 - Previous: Only 4 points of 1,000 (with maximum of 8) required to meet requirement for experience implementing a collections system
- Phased implementation as opposed to “Big Bang”



Executive Steering Committee

- Following the recommendation of the Evaluation Team, the Executive Steering Committee also gave approval to designate Omni/FICO as the Apparent Successful Bidder and begin contract negotiations.
- Negotiations kicked off late September
- Planned Project Kick off: **January 2020**



Organizational Change Management

- RFP Released July 26
- Evaluation team meeting to score proposals October 8
- Scope of Work includes:
 - Leadership and Stakeholder Engagement
 - Communication Management
 - Business Readiness Assessment
 - Organization and Work Design
 - Training and Support
 - Solution Alignment
 - Change Agent Network Management
- Coordinating kick to coincide with NCS



Collections Eco-System

- Mobile Payment –September launch
 - Soft launch initially to test
 - Mobile friendly site successfully tested with most major devices
- CBTS / IVR – migration Dec 4 & 5
 - Enhanced functionality: call campaigns, text notices, reporting
 - 24/7 payment acceptance
- SAGE (accounting software) – drafting RFP
 - Integration into CUBS – risk mitigation
 - Full integration into NCS

Protecting Ohio's Families

Ohio Attorney General's Student Loan Debt Advisory Group



Report

June 2017

 **MIKE DEWINE**
OHIO ATTORNEY GENERAL

Recommendation #22

The Attorney General's Office and Ohio's higher education institutions should continue to collaborate with interested parties.

The AGO, colleges, and universities should continue efforts to collaborate with interested organizations to promote the use of best practices for student debt collection statewide. **This may include the continuation of an advisory body, in some form, after initial recommendations have been implemented.**



Recommendation #7

Institutions should adopt uniform certification practices. The Attorney General's Office should work with institutions of higher education to insure that they **adopt uniform standards for fees and penalties and certification practices for all student debt** that is to be collected by the AGO.



Recommendation #21

The Attorney General's Office should **produce reports on its student debt portfolio.** The reports should include the number of portfolios, number of accounts for various types of debt, and total debt amount.



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