

RFP Evaluation Ratings
Date of Rating: 09/14/2017
RFP Name: Loan Processing

Reviewers:

Aggregate

| Supplier Name: XYZ Loan Processing | | | | | | | | | | | |
|---|---|--------------|--------------|--------------|--------------|-------------|-------------|-------------|-------------|--------------|----------------|
| Rate each criteria below on a scale of 1 to 5 -- 1 being low and 5 being high -- for each firm. Your evaluation will be used to determine which firm best meet the needs of the University. Each committee member will be allowed one vote. | | Rating | Rating | Rating | Rating | Rating | Rating | Rating | Rating | Rating | |
| 30% | <u>Eligibility</u> - Overall completeness and competitiveness of the proposal - Cost to the University, Cost to Student, Innovations in the development of efficient and economical global payment solutions for the education industry, school partnerships, percentage of higher education market, growth trend in higher education market, company stability, financial and structural, number of currencies, international students access, | 1.00 | 5.00 | 3.00 | 2.00 | | | | | 2.75 | |
| 10% | <u>Data & System Security</u> - Adequacy of controls and guidelines around the issues of secure infrastructure, and security standards | 2.00 | 3.00 | 5.00 | 3.00 | | | | | 3.25 | |
| 10% | <u>References</u> - Feedback from references re: company performance in wire processing and service to students | 2.00 | 3.00 | 1.00 | 2.00 | | | | | 2.00 | |
| 25% | <u>Customer Service</u> – the ability of the vendor to provide prompt attention to issues and concerns. An effective front-end process and tracking mechanism as well as personal contacts during wire processing are essential. | 1.00 | 5.00 | 4.00 | 2.00 | | | | | 3.00 | |
| 15% | <u>Process Flexibility</u> – ability to provide various approaches for student wire processing, access options, culturally-sensitive communications, website customization. Provide process tracking solutions; seamless relationship between the University, Student and Vendor. | 3.00 | 5.00 | 4.00 | 1.00 | | | | | 3.25 | |
| 10% | <u>Data and Management Reporting</u> – the ability to provide customizable reports to the University and the appropriate mechanisms for processing and/or tracking individual account and/or portfolio performance. Secure data transfer mechanism, ability to interface with PeopleSoft, capacity to transmit data utilizing Columbia file specifications. | 4.00 | 4.00 | 4.00 | 3.00 | | | | | 3.75 | |
| 100% | Rating Total | 13.00 | 25.00 | 21.00 | 13.00 | 0.00 | 0.00 | 0.00 | 0.00 | 18.00 | 0.00 |
| | Weighted Total | 1.80 | 4.50 | 3.50 | 2.05 | 0.00 | 0.50 | 0.00 | 0.00 | 2.96 | #VALUE! |