NCSEAA

North Carolina State Education
Assistance Authority

SENT VIA ELECTRONIC MAIL

To: Representative Craig Horn, Co-Chair
          Representative Linda Johnson, Co-Chair
          Senator Chad Barefoot, Co-Chair
          Fiscal Research Division

From: Elizabeth V. McDuffie, Executive Director

Date: September 28, 2017

Subject: Update on Software Acquisition for Administration of Opportunity Scholarship and
          Special Education Scholarship for Children with Disabilities Programs

Pursuant to Section 10A.1.(b) of S.L. 2017-57, the State Education Assistance Authority is providing an update on the acquisition of software to support the operations of the Opportunity Scholarship and the Special Education Scholarships for Children with Disabilities Programs.

The Authority issued a Request for Proposal (RFP) on August 14, 2017 through the State's Interactive Purchasing System. The RFP outlined the requirements for the system and highlighted the milestones for implementation of the system. The RFP also outlined scenarios that the Authority would like the software vendors to demonstrate if they are selected to come to our offices for a visit. The Authority received three responses to the RFP on September 15, 2017. Two of the vendors' proposals were strong and each has agreed to provide demonstrations of their systems during the first week of October.

Following the product demonstrations, the Authority expects to select a vendor and submit the choice to UNC-General Administration by the middle of October for review and approval. Upon completion of the approval processes, the Authority will begin work with the vendor in mid-November. In the meantime, the Authority is documenting its current business rules and requirements to expedite the process when the vendor begins to customize the product.

Earlier this year, the Authority hired a dedicated business analyst/project manager to begin preparation for the project, including drafting the RFP. In addition to the salary for that time-limited position, Authority personnel from various divisions including IT, financial services, program staff, and legal affairs are incurring time costs related to the project. We expect the implementation of the project to span multiple fiscal years and will advise the General Assembly regarding the projected distribution of funds in the current fiscal year after a vendor is selected.

We appreciate the General Assembly's authorization of funds to purchase software to support the K-12 programs. As program participation increases, the software will enable us to administer the programs more efficiently and provide excellent customer service to the families and schools participating in the programs. If you have any further questions regarding the purchase of the software system, please contact me at 919-248-4642 or McDuffie@ncseaa.edu.

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The University of North Carolina provides the secretariat for the Authority