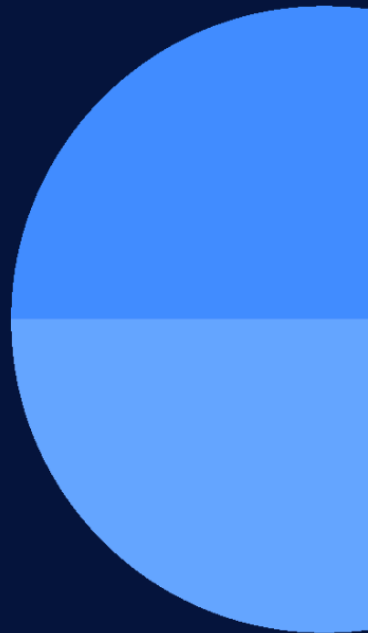


# Continuing Ed Grant and Scholarship Packaging

**PRESENTED BY:** Kimberly Steele, Ferrilli

**PRESENTED TO:** Galveston College

**DELIVERED ON:** March 07, 2025



# About Ferrilli

## Introduction

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Thank you for the opportunity to submit this proposal for our services. This proposal provides information regarding our company, overview of the assignment, and associated timing and cost.

We hope that you will choose Ferrilli and allow us to demonstrate the difference that dedicated customer-centric service, a proactive approach and deep higher education experience can make on student success.

It has been our experience that clients tend to think of Ferrilli in singular terms, such as the specific service we provided for them. Later, they are typically surprised to learn about our full range of capabilities. We want to emphasize from the start that when it comes to IT services for higher education, Ferrilli is ready and able to assist you in a variety of ways.

The relationship we have with each client is something we cherish. While we are known for our proactive approach, please remember that we are always ready to help with any questions, concerns, or additional needs you may have. We look forward to serving you.

Technology is  
**opportunity.**

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Please direct questions regarding any portion of this proposal to:

**NAME: Ashleigh Mayer**

**TITLE: Regional Account Manager**

**PHONE: (610) 340-3172**

**EMAIL: [amayer@ferrilli.com](mailto:amayer@ferrilli.com)**

## Ferrilli is a technology services provider that accelerates a path to change through technology.

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Our company was founded in 2003 to fulfill the need for IT service professionals who truly understand the unique needs and challenges of higher education.

Our clients value our integrity, reliability, specialized experience, and diverse range of capabilities. They tell us that working with Ferrilli is like having a trusted partner or a skilled extension of their staff on-call 24/7/365. We are often called upon to solve problems, or to serve as a strategic partner who can help map out the best path forward.

## The outcomes that technology allows you to achieve is [what really matters](#).

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### What you can expect.

- On every assignment, we objectively look for ways to maximize your return on technology and offer those suggestions to you. That's the Ferrilli way.
- We stand by our work and performance with unconditional support. We guarantee it.
- Think of us as a fully capable strategic partner who can solve a pressing technology problem, perform a technology audit, or provide the advice and support you need on any project.
- Our goal is the same as your goal—student success—and we focus our experience, creativity, and expertise to help achieve it on every assignment, large or small.
- Every institution is unique. That's why we take the time to get to know you. We listen and ask the right questions in order to thoroughly understand your needs and culture before ever making a single recommendation.

# Ferrilli Services

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The following list provides a general overview of our services. Please contact us if you have questions regarding additional technology services that are not listed here.

## Technology Effectiveness Assessments

We will help you assess institutional goals; gather input and feedback from students, faculty and staff campus-wide; identify solutions; develop initiatives aligned with priorities. The end deliverable is a solid plan, complete with strong buy-in and the budget required to achieve your goals.

## Leadership & Team Deployment

Our professionals have the skills and experience to keep your initiatives on track and perform seamlessly in a leadership capacity for as long as needed. We can also provide assistance with an executive search to fill a permanent position.

## ERP & SIS Support

Our ERP consultants and support team leverage unmatched technical and functional expertise to improve operations and business processes, reduce costs, and delight users across the campus.

## CORE Managed Services

Ferrilli's CORE higher education managed services provide cost-effective ways for colleges and universities to manage their most crucial IT services. We provide targeted expertise across the entire stack, from full managed services for your ERP and SIS to assistance with more specific solutions.

## Security, Cloud & Infrastructure Services

At a time when the consequences of service interruptions and data breaches have never been greater, our Security, Cloud & Infrastructure services ensure your systems can stand up to today's leading threats. And at a time when institutions are modernizing faster than ever before, we help you build and maintain an IT infrastructure that encourages innovation rather than stifling it.

## CRM Optimization

We provide support for a wide range of the most popular CRM systems in higher education today, including Salesforce, Microsoft Dynamics, Technolutions Slate, and specialized systems such as Ellucian's suite of CRM Recruit, CRM Advise, and CRM Advance.

## Dedicated Project Services

Available on a per-project basis to fulfill most higher education IT service needs, including custom programming, technical support, implementations, migrations, upgrades, enhancements and more!

**The Ferrilli Difference** can best be summed up as the unique combination of the following attributes and principles:

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### **We are higher ed**

The strength of our team stems from our backgrounds in the very institutions we serve. We've been on the inside and know where the value is hidden among your institution's complexity.

### **Outcomes over tech**

Ferrilli follows the outcome. Many firms can provide IT support. Fewer have the vision, capability, and knowledge to see the big picture: how the right technology can accelerate a path to true transformation and success.

### **If you're not happy, we're not happy**

Every company says they're built on a foundation of trust. We stake our money on it with a satisfaction guarantee.

### **Leading with service**

At Ferrilli, we practice an unparalleled commitment to customer service. This isn't an empty sales claim. It's intrinsic to our corporate culture.

### **Independent and objective**

We don't sell hardware or software. We believe that the best technology and the best path forward is the one that is right for the institution.

### **Commitment follows belief**

Ferrilli believes in the mission. We believe that education is a priority. We believe that empowering institutions means better outcomes for students. And we believe, in higher ed especially, that real change is achieved through collective effort.

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# Scope of Work

## TERMS AND CONDITIONS

### 1. Services

Ferrilli will provide services as directed in the completion of the tasks set forth in the attached Job Order. The Job Order, together with these Terms and Conditions, shall constitute the parties' Agreement. Ferrilli agrees to keep the Client regularly informed of the progress of work performed under this Agreement

### 2. Compensation

The Client will pay Ferrilli the agreed upon costs as set forth in the Job Order plus reasonable travel expenses as set forth in the Job Order. Ferrilli will invoice on the basis set forth in the Job Order for labor, travel time and travel expenses with payment due as set forth in the Job Order. No increase in amount or scope of services is authorized without formal written amendment to this Agreement through a Change Order executed by the parties.

### 3. Cancellation of Scheduled Services

The parties agree that once the Client and Ferrilli have scheduled a specific time during which Ferrilli will provide services under the terms of this Agreement, the Client shall pay Ferrilli for such services as if Ferrilli had performed such services on the date scheduled, unless the Client has notified Ferrilli that the Client would like to reschedule or cancel the scheduled services at least fifteen (15) business days prior to the date on which Ferrilli is scheduled to perform such services. The Client's payment shall include the full cost of scheduled consulting services and all actual out-of-pocket expenses incurred in advance of the scheduled consulting services (e.g., non-refundable airline tickets).

### 4. Term

This Agreement is effective upon signatures and will be presumed to continue in effect until cancelled by either party by providing at least 30 days' advance written notice to the other party.

### 5. Reports

Any and all files, notes, reports, manuscripts and any other work produced, prepared or developed by Ferrilli as a part of the work under this Agreement are the property of the Client and shall be provided to the Client upon the termination of this Agreement.

### 6. Independent Contractor; Relationship with Ferrilli

Ferrilli will control the means and manner in which work is performed under this agreement and, in all respects, Ferrilli's relationship to the Client will be that of an independent contractor, not an employee. Further, nothing contained herein shall be deemed or construed to create any agency relationship, joint venture, partnership or similar relationship between Client and Ferrilli. Neither party is authorized to incur any obligation in the other's name. Neither shall be held responsible or liable to the other except as specifically set forth in this Agreement. Neither party shall be held responsible or liable to the other party or to any third party for or on account of any act or omission by the other party except as specifically set forth in this Agreement. Consistent with this independent relationship, Ferrilli may

provide services to other clients which are substantially similar to the services provided to the Client.

## **7. Force Majeure**

Neither party to this Agreement will be liable to the other for any failure or delay in performance under this Agreement due to circumstances beyond its reasonable control including without limitation: acts of God; accident; labor disruption; acts, omissions and defaults of third parties; and official, governmental and judicial action not the fault of the party failing or delaying in performance. The effect of such an occurrence of a *force majeure* event shall result in the immediate termination of this Agreement unless both parties ratify, accept, or acknowledge that this Agreement shall continue.

## **8. No Warranty**

No warranty is stated or implied regarding the services provided under this Agreement. As such, Ferrilli specifically disclaims any and all warranties. Ferrilli makes no warranties or representations of any kind for the services. This means that Ferrilli is providing the services without warranties of any kind, either express or implied, including but not limited to warranties of title, non-infringement, or express or implied warranties of merchantability or fitness for any particular purpose. No advice or information given by Ferrilli or its agents or employees shall create any kind of warranty.

## **9. Indemnification**

Ferrilli agrees to and shall indemnify, defend and hold harmless the Client, its officers, agents and employees free and harmless from, against and in respect of all claims, demands, losses, costs, expenses, obligations, liabilities, damages, recoveries and deficiencies, including interest penalties and reasonable attorneys fees that the Client shall incur or suffer, which solely arise, result from, or relate to Ferrilli's negligence in providing the services set forth in this Agreement. Ferrilli shall only be liable for those losses, claims, or damages that arise as a result of performance under the terms, conditions, and period of this Agreement which solely and directly result from the negligence of Ferrilli and shall in no circumstance exceed amounts actually paid by the Client pursuant to this Agreement in aggregate.

## **10. Limitation of Liability**

Ferrilli and the Client acknowledge and agree that in no event will Ferrilli's liability in connection with the services provided by Ferrilli under this agreement exceed the amount actually paid to Ferrilli by the Client under this agreement and Ferrilli will not be liable for any special, incidental, or consequential damages, including without limitation loss of profits, loss of data, and loss of revenues, even if informed of the possibility thereof in advance. These limitations apply to all causes of action in the aggregate, including without limitation breach of contract, Ferrilli's negligence, strict liability, misrepresentation, and other causes of action based on similar legal theories. Ferrilli and the Client further acknowledge and agree that they are entering into this agreement on the understanding that the fees for the services provided by Ferrilli under this agreement have been set to reflect the fact that the Client's remedies, and Ferrilli's liability, shall be limited as expressly set forth in this agreement, and, if not so limited, the fees for the same services would have been substantially higher.

## **11. Client Representations and Indemnification**

Client represents and warrants (a) that it is duly authorized and empowered to enter into this Agreement, (b) the execution, delivery and performance of this Agreement by Ferrilli does not and will not conflict with, breach, violate or cause a default under any contract, agreement, license, instrument, order, judgment or decree to which Client is a party or by which it is bound, and (c) upon the execution and delivery of this Agreement, this Agreement shall be the

valid and binding obligation of Company, enforceable in accordance with its terms, subject to applicable bankruptcy, insolvency and similar laws affecting the rights of creditor generally. Client agrees to and shall, to the extent allowed by law, indemnify defend and hold harmless Ferrilli, its officers, agents and employees free and harmless from, against and in respect of all claims, demands, losses, costs, expenses, obligations, liabilities, damages, recoveries and deficiencies, including interest penalties and reasonable attorneys fees that Ferrilli shall incur or suffer, which solely arise, result from, or relate to Client's breach of these specific representations.

#### **12. Ownership of Works for Hire**

All matters produced under this Agreement shall be works for hire and shall become the sole property of the Client. Said works cannot be used for any other client or purposes without the Client's expressed written permission. The Client shall have all right, title and interest in said matters, including the right to obtain and maintain the copyright, trademark, and/or patent of said matters in the name of the Client. Ferrilli shall reserve the right to provide similar services or solutions to other clients to the extent that (a) Client does not exercise its rights to copyright, trademark and/or patent any of the said matter; or (b) such similar services do not use the Client's work product from the scope of work of this agreement; or (c) such similar services or solutions do not use the Client's valid copyrighted, trademarked, patented, or confidential materials.

#### **13. Worker's Compensation Insurance**

Ferrilli agrees to procure and maintain in full force and effect worker's compensation insurance covering its partners, employees and agents while said persons are performing services pursuant to this Agreement. In the event that an employee of Ferrilli performing this Agreement files a worker's compensation claim against the Client, Ferrilli agrees to defend and hold the Client harmless from such claim.

#### **14. Cyber Insurance**

Ferrilli maintains cyber insurance for services it provides pursuant to this Agreement. Client shall be entitled to review the current policy coverage terms and limits upon request.

#### **15. Nondiscrimination in Employment**

Ferrilli maintains a written policy against unlawful discrimination in employment because of race, color, religious creed, national origin, ancestry, physical handicap, marital status, or gender.

#### **16. Severability**

It is the intent and understanding of the parties hereto that if, in any action before any court or other tribunal of competent jurisdiction legally empowered to enforce this Agreement, any term, restriction, covenant, or promise is held to be unenforceable as a result of being unreasonable or for any other reason, then such term, restriction, covenant, or promise shall not thereby be terminated, but, that it shall be deemed modified to the extent necessary to make it enforceable by such court or other tribunal and, if it cannot be so modified, that it shall be deemed amended to delete therefrom such provision or portion adjudicated to be invalid or unenforceable, and this agreement shall be deemed to be in full force and effect as so modified and such modification or amendment in any event shall apply only with respect to the operation of this Agreement in the particular jurisdiction in which such adjudication is made.

#### **17. Waiver**

No provision of this Agreement may be modified, waived or discharged unless such waiver, modification or discharge is agreed to in a writing executed by Client and Ferrilli.

#### **18. Non-Solicitation**



During the term of this Agreement, and for a period of six (6) months thereafter, the Client will not solicit for employment any employees of Ferrilli or its affiliates who, within six (6) months prior to such solicitation: (a) directly performed under this Agreement, (b) had substantial contact with the hiring party in relation to this Agreement, or (c) the hiring party became aware of due to, or derived from information learned through the performance of, this Agreement. For this purpose, "solicitation" does not include contact resulting from indirect means such as public advertisement, placement firm searches or similar means not directed specifically at the employee to which the employee responds on his or her own initiative. Notwithstanding the foregoing, either party may at any time, directly or indirectly, solicit and hire any employee of the other party if such employee did not resign but was terminated by the other party. Ferrilli will have the right to seek and recover direct damages from the Client for breach of this provision, including costs of suit and attorney's fees.

#### 19. Entire Agreement

This agreement contains the entire agreement between the parties hereto, and supersedes any and all other agreements heretofore made.

<b>Job Name</b>	Continuing Ed Grant and Scholarship Packaging
<b>Institution</b>	Galveston College
<b>Contract Contact</b>	Meghann Nash
<b>Job Contact</b>	Meghann Nash
<b>Hereafter referred to as "Client"</b>	

<b>Assigned Consultant</b>	TBD
<b>Scheduled Dates:</b>	Dates will be scheduled upon signature of proposal and availability.
<b>Account Manager:</b>	Ashleigh Mayer
<b>Account Manager Phone:</b>	(610) 340-3172

#### Summary of Needs:

Galveston College has requested Ferrilli's assistance with configuring Colleague to allow for autopackaging of awards for Continuing Education students.

#### Scope of Work:

A Ferrilli consultant will:

- Configure Colleague Autopackager for Continuing Education students

- Create packaging groups, definitions and assignment rules for CE Students
  - Create Budget components and assignment rules for CE students
  - Review awards to be evaluated for autopackager
  - Create eligibility criteria rules
  - Create transmittal rules
  - Create saved list selection criteria
  - Test and debug processes
  - Work with Galveston staff to move approved configurations to Production
- Provide configuration and process documentation
  - Provide Training on maintenance and processes

#### **Approach/Methodology:**

Ferrilli will assign an experienced Project Coordinator to plan and oversee all Ferrilli team activities throughout the project and ensure close coordination with the Galveston College leadership and team. The Ferrilli PM will:

- Develop the project plan and schedule.
- Ensure the various components of project work are effectively assigned, communicated, and delivered according the scope of work.
- Ensure all work products and deliverables are tracked, delivered and signed off.

#### **Deliverables:**

- Configuration updates to support autopackaging for Continuing Education students
- Documentation of configuration and supporting processes
- Training for staff on maintenance and process

#### **Client Responsibilities:**

Client will provide:

- Access to necessary systems including a recently cloned Test or Development Colleague environment with Colleague Studio access
- Timely access to FA Staff discussion of configuration specifications
- Timely access to FA staff for testing and training

#### **Scope Exclusions:**

This scope will allow for autopackaging of students only enrolled in Continuing Education classes. Students enrolled in regular student programs also taking Continuing Education classes will not be able to be autopackaged due to technical limitations in Colleague.

If custom code is needed (computed columns, subroutines) it may be necessary to execute a change order for additional hours.

#### **Location of Work:**

Remote

#### **Pricing:**

**Hourly Rate: \$205.00\***

**Estimated Number of Hours: 160**

**Total: \$32,800.00**

Plus travel and expenses

\*Ferrilli's normal rate is \$250/hour

- 1. All prices shall be held open for [30] days.**
- 2. All orders are subject to the terms and conditions included with this job order.**
- 3. Job order effective upon receipt of signed acceptance by client.**

For Ferrilli:

A handwritten signature in black ink, appearing to read 'R. Ferrilli', is written over a faint horizontal line.

Robert Ferrilli, President

Date: 2024-04-22

**Accepted as to job order and terms and conditions.**

Signature

Presented to:

Galveston College

March 07, 2025, 11:26:35 AM

Accepted by:

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**Printed Name**

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**Signed Name**

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**Title**

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**Date**