

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
6	Health and safety support and building security support Two guards 16 hours overnight 365. ECMC is responsible for reimbursement of the guards not for overall security of the facility.	Outside Services expense: Allied Barton Security Services Payments
7	Use of board room/meeting rooms with audio/visual capability and technical support. Will provide space that can accommodate the California Open Meeting Rules. The CSAC Commission meetings 4 times/year.	Rent payment to the City of Rancho Cordova.
8	Records retention, shred services, and property inventory services 15 months for: <ul style="list-style-type: none"> <li>• CSAC brought this in-house. Cintas (shred service)</li> <li>• ECMC staff support for oversight and management of services (200 hours)</li> </ul> TAB costs included	Record Storage Costs paid to Iron Mountain and Hours charged by CA Records staff directly supported these services.
13	CSAC Asset Inventory	No activity reported

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
17	<p>Provide a one-time security risk assessment of the Grant Delivery system to include scanning for security vulnerabilities and review of system logs for intrusion attempts.</p> <p>Contract services for an external provider to perform a security assessment – this does not include remediation of any issues found</p>	<p>Contract with NetSpi signed in December.* The Kickoff meeting has been postponed until May based on CSAC’s request. Netspi was paid the first 50% of the contract in January.</p> <p>*This work is part of the previous Operating Agreement. Request for reallocation of costs submitted to Finance.</p>
19B	<p>Convert printing the Cal Grant Letters from the mainframe to an ASCII solution. To be completed prior to decommissioning the mainframe after the FAPS conversion.</p>	<p>No activity reported</p>
25	<p>Assist the Commission with obtaining training for more than 3,000 high school counselors and postsecondary educational institutional financial aid officers on the programs administered by the Commission.</p> <ul style="list-style-type: none"> <li>• Produce 10-15 one to two minute video clips and integrate into CSAC systems</li> <li>• Produce 20-25 thirty minute to one hour training videos</li> </ul> <p>Video production costs include:</p> <ul style="list-style-type: none"> <li>• <b>Preproduction Services:</b> Script consultation, scriptwriting &amp; production coordination</li> <li>• <b>Field Production Services:</b> Videographer, Field Producer, Broadcast quality digital camera</li> <li>• <b>Post Production &amp; Editing</b></li> </ul>	<p>No activity reported</p>

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
26	<p>Providing the high school training materials. Composition, design, production, shipping and training for 19 locations</p> <p>There are 2 cycles for this publication in this operating agreement.</p> <p>Each cycle costs are reflected (need to plan for 2 cycles) books. This does not include shipping to the 19 locations. Shipping is included in #4.</p>	<p>Printing Costs</p> <p>Hours charged by CA Training staff directly supported this service (close out November workshops).</p>
28	<p>Support for Cash For College workshops</p>	<p>No activity reported</p>
29A	<p>Provide various collateral publications used to inform students, parents and counselors of state and federal financial aid programs.</p> <p>Publication estimate includes: College is Possible, Power of Education, Cal Grant Inserts.</p> <p>There are 2 cycles for these publications in this operating agreement. Based on the changes that CSAC anticipates they need to estimate a vendor cost.</p> <p>(Outsourced)  <i>This cost is for copy and design only.</i></p>	<p>No activity reported</p>
29B	<p>Print the tax benefit one page flyer. This would be a two cycle project.</p> <p>(Outsourced)                      Costs are for each cycle. Need to plan for two cycles.</p> <p>No shipping/postage included because piece was delivered to CSAC last year.</p>	<p>Corp Communication resource worked on first cycle flyer and the PDF was delivered to CSAC on February 8.</p>

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
30	<p>Fund Your Future: This includes copy, design, Spanish translation and printing of the Fund Your Future publication. Print estimates are based on the following quantities:                      550,000 English workbooks                      132,000 Spanish workbooks                      385,000 English brochures                      90,000 Spanish brochures</p> <p>ECMC will provide editing on the Federal information; this is included in the 1000 hours.</p> <p>CSAC will retain a vendor to create the publications, translate them and provide all fulfillment. Fulfillment costs are included in # 4.</p> <p>Outsource: Project oversight/ copy/ design/ layout/ stock photos</p>	<p>ECMC ordered an additional 25,000 Spanish and 25,000 English brochures at CSAC's request from last year's cycle - publications received on Jan 5. Charges will go against this year service.</p> <p>On February 8, Geri met with Louise Schroeder &amp; Janet McDuffie regarding the transition of this publication project from ECMC to CSAC. All information surrounding project was forwarded to them on February 17.</p> <p>All reallocations made to 2011 project code. Total costs &amp; hours for 2011 period reported as:                      \$291,145.60                      1,142.25 hrs</p>
39	<p>High School Program Support originally described as "Conduct one major research project as designated by the Commission"</p> <p>ECMC staff support for high school workshops.</p>	<p>Costs to date represent shirts purchased for CA conference wear.</p> <p>In January, ECMC agreed to an \$1800 sponsorship for a college fair/financial aid workshop with the Mexican Consulate General on February 4<sup>th</sup>. ECMC anticipating invoice for the sponsorship.</p>

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
40	Provide as-needed services to align Commission administered programs with changes in Federal financial aid processes and procedures (such as changes arising from FAFSA form changes that impact Cal Grant processes) API Project	No activity reported.
42	CaliforniaColleges.edu sponsorship for CSAC	Sponsorship charges incurred to date.
43	Pell Grant Table development	No activity reported.
44	Provide check \$1,500 for Arthur Marmaduke High School Counselor Award in Spring 2012.	No activity reported
45	EdFund's EDD unemployment insurance invoices for 2011/2012	Insurance charges incurred to date.
47	Financial Aid APP for iPhone A generic questionnaire similar to that referenced above which would just provide questions and potential financial aid options without the ability to apply directly.	Hours charged by Marketing staff directly supported this effort.  *Only hours have been charged, no other direct costs.
48	CSAC migration from GroupWise/NDS to Exchange/AD GroupWise Support included in this item.	No activity reported.

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
52	EdFund Board Professional Expenses	Legal Services in support of Board activities to date.
53A	GDS Changes for SB70 1,040 contractor hours @ \$85/hour = <b>\$88,400</b>	No activity reported.
53B	APLE Programmer 2,080hours @ \$85/hour = <b>\$ 176,800</b>	No activity reported
54	Webmaster / CSAC website design services  CSAC's website is dated and needs updating to better serve its users. 350 hours @ \$85/hour = <b>\$29,750</b>	No activity reported

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

## Services Provided by ECMC Staff

Ref #	Details	Status
1	Print letters, reports, and other program material	General CSAC printing.
2	Receive and deliver mail, large parcels and packages for the Commission	Daily mail, parcel, and package delivery. <ul style="list-style-type: none"> <li>Two Business Services staff pick up mail at the US Post Office and deliver to CSAC offices</li> <li>Two internal mail runs are performed at CSAC offices (11:30am PT, 2:30pm PT)</li> </ul> Mail drop-off at the US Post Office at COB
3	Courier services for the Commission to the bank and the downtown area.  CSAC to EdFund: 1 per day Downtown: twice daily	Delivery charges incurred to date. General courier services.  Two daily courier runs to pick up and drop off financial documents at the CA State Controller's Office and any other requested Downtown sites.  *Will reallocate 64.25 hours to service #2. Staff charged time to incorrect code.
4	Storage of financial aid workbooks, brochures, fact sheets, guides, manuals, posters and videos  Shipping to high schools and colleges (including collateral material, inventory and usage)	Rent expenses.  Delivery charges.  Postage  Hours charged by CA Corp Services staff supported this service.  *Run rate is slightly high at this point due to peak volume of work performed November-Feb.

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
5	Contract management (including, but not limited to: technology, web conferencing, recycle, confidential shred, building security system, storage and cubicle services)	Hours charged by CA Legal staff directly supported these services.
10	<p>Access to retrieve documents previously imaged</p> <p>Existing license and system</p> <p>Assumes VisiFlow system will be given back to CSAC upon conversion completion</p> <p>Current contract in place with Western Integrated that runs through 12/31/2013 for software maintenance.</p> <p>Cost additional effort for building a standalone server for VisiFlow imaging.</p> <ol style="list-style-type: none"> <li>1. Choose one of the existing machines - like VMServ-6 or VMServ-7 (R900) to repurpose as an ESXi server.</li> <li>2. Order Large Capacity hard drives to house the data.</li> <li>3. P2V NTStorage once EdFund's old data is removed or build new as a VM.</li> <li>4. Configure ESXi server</li> <li>5. Migrate 4 - VM's to the ESXi server.</li> <li>6. Application Team to clean up any old data.</li> <li>7. Create local CSAC accounts.</li> <li>8. Remove the VM's from the corp.edfund.org domain. CSAC can join these servers to their domain.</li> <li>9. Provide any existing VisiFlow documentation to CSAC.</li> <li>10. Desktop Support to turn over the imaging stations and any supported documentation.</li> </ol>	No activity reported.

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
11 A	<p>Estimated 800,000 paper applications and other documents to be imaged annually (such as paper GPA verification forms, the G-8 High School Graduation Certification Form, the Transfer Entitlement Certification Form and numerous Specialized Programs forms)</p> <p>CSAC estimates that annual imaging is closer to 200,000 and will decrease as certain items, such as APLE automation are completed during 11/12.</p>	<p>23 boxes returned to CSAC in February.</p> <p>169 total boxes returned to CSAC.</p>
11 B	<p>Backlog Imaging</p> <p>CSAC would like 250 of the remaining boxes of backlog imaging to be scanned.</p>	<p>*Imaging inventory received by ECMC is not marked as backlog or not. Imaging team records all hours associated with the CSAC imaging to Service # 11A; therefore hours were combined (11A+11B)</p>
12	<p>Maintain and operate a Storage Area Network (SAN), which is architecture that allows remote computer storage devices to be attached to servers. This provides the server storage for the GDS system</p>	<p>No activity reported</p>
14	<p>Software purchasing and contracting for imaging software, IVR, Oracle Data Base Management System (DBMS) software, and security software in support of the GDS system</p>	<p>Hours charged directly supported this service, specifically Oracle contract review.</p>
15	<p>Backup database administration for the GDS to augment current Commission support</p> <p>Additional services include Oracle DBA support for upgrading and advanced tuning, and troubleshooting the production GDS databases</p>	<p>No activity reported</p>

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
16	When requested, provide needed expertise for support, troubleshooting or repair of GDS production networks, appliance, and firewalls – this service should not require more than 50 hours of support in a year	No activity reported
18	Provide Linux system administration and support for GDS servers located at OTS – this includes upgrading, patching, auditing, and ensuring optimal performance and security controls are in place	No activity reported
19A	Provide mainframe printing services for the Commission which includes changing and creating new overlays and letter formats for GDS letters – the Commission prints over 100 different GDS letter types (approximately 1.5 million letters a year)  Hours to modify 50 letters and print all jobs	No activity reported
20	Maintain the various ListServe accounts used by the Commission to distribute information to schools  Current maintenance, training of CSAC staff on the current process and final transition of the application  CSAC is in the process of transitioning this service in-house, these hours can be reduced.	No activity reported
21	Programming and updating Student Expense and Resources Survey (SEARS) application software  Transition support to CSAC	No activity reported

# ECMC

## CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
22	<p>Provide Tier 1 Help Desk support for 400 postsecondary institutions, over 1800 high schools, over 300,000 student accounts on WebGrants for Students, and Commission staff – these calls are logged in the HEAT ticketing database and dispatched to appropriate Commission personnel for problem resolution</p> <p>Service labor hours—continue to use the CSAC HEAT system</p> <p>Due to CSAC call volume, 1.5 FTEs are required for 2011/2012 to accommodate peak call periods, while minimizing dropped calls.</p>	<p><b>February 2012 statistics</b></p> <p>Total all CSAC Calls Received: 8,255                      Total all CSAC Calls Abandoned: 3,050</p> <p>Total tickets created by Helpdesk: 1,567                      CSAC tickets resolved by ECMC: 1,456                      CSAC tickets assigned to CSAC: 109</p>
23	<p>Provide all telephony services for the Commission, including but not limited to telephone installation, configuration, modification and hardware support for over 150 IVR telephone interfaces, telephone number assignments, voicemail, and toll-free line support</p> <p>CSAC has assigned internal staff to perform these functions, but would like to be able to request assistance in the unlikely event it is needed.</p>	No activity reported
41	<p>Contracts owned by ECMC but are shared with CSAC</p> <p>See contract list, the items stated as ECMC ownership joint use by ECMC and CSAC</p>	Hours charged by Legal staff directly supported these services.
42	Project: CSAC SAN OS Upgrade (SAN Phase II)	Completed Implementation on 12/17/11. Closed Project on 12/31/11.

# ECMC

CSAC Services Status Report - February 1, 2012 - February 29, 2012

ECMC-CSAC  
 Operating Agreement  
 October 1, 2011 - December 31, 2012

Ref #	Details	Status
48	CSAC Services - General <ul style="list-style-type: none"> <li>• Customer Relationship Manager</li> <li>• Executive Support</li> <li>• Finance Support</li> </ul>	Project Management and customer relationship support for CSAC Services.  General management and support of CSAC Services.
55	Maintain edfund.org website. Updating of EdFund Board notices.  Board Updates: 4 meetings/year + 4 amendments = 8 changes	No activity this period.
49	Assist with filing IRS Form 990 for FY ending 9/30/2011 and FY ending 9/30/2012.  Prepare, review, and file IRS Form 990 and associated state filings.	Hours charged by CA Finance staff directly supported this service.
50	Support and review two EdFund audits for FY ending 9/30/2011 and FY ending 9/30/2012, prepare financial statement and audit report. EdFund financial statement required to prepare Form 990.	Hours charged by CA Finance staff directly supported these services:
51	Maintain and manage EdFund Auxiliary Account and other EdFund financial activity.	Hours charged by CA Finance staff directly supported these services.