



SMART TUITION
Financial Solutions for Schools and Parents™

Proposal for Services
Diocese of
Rockville Centre

April 30, 2015

Introduction

Smart Tuition thanks the Diocese of Rockville Centre for the opportunity to be a tuition management service provider for the Catholic schools of the Diocese of Rockville Centre. It is understood that any parochial school may voluntarily choose Smart Tuition and the same pricing and service levels will be offered. Smart is committed to delivering excellent service to the schools and strengthening schools' financial health while providing options for families.

This Agreement articulates the deliverables from Smart. It also confirms the pricing agreement for managing recurring tuition collection.

Smart Deliverables – Preferred Vendor Status

Tuition Management: (Standard Pricing - \$50 per monthly (2-12) payment plan)

- Customize tuition payment options for each school based on school's choices
- Conduct onsite visit to get a school started with the service
- Handle all tuition and fee collection for each school, including, where selected, the printing and mailing of all invoices
- Provide a secure caging facility for receipt of mailed payments
- Provide 24/7/365 Customer Service for families via toll-free number in English and Spanish
- Transfer collected funds to each individual schools designated bank account six times per month
- Provide detailed reporting on all funds collected
- Send email reminders to all families with valid email addresses 5 days prior to due date
- Follow up with a family by email and phone promptly when a payment becomes delinquent
- Provide online training at no additional cost on using the Smart system
- Store and back up all data and keep reports available for seven years

Smart Enterprise (free to Diocesan Groups)

Smart Tuition will provide the Enterprise application to the Diocese at no additional charge. In addition, Smart Tuition commits to supplying any necessary programming development to customize this online tool to meet the specific needs and requirements of the Diocese. This would include:

- Building custom reports;
- Setting diocesan level controls for security, access, read-only or edit permissions, and system-wide settings, restrictions and/or requirements/
- Working with diocesan IT and Finance personnel to import Smart-generated reports into diocesan accounting and enrollment software application;
- Customizing the dashboard for quick views and summary reports based on diocesan identified needs.

Smart Aid (Standard application fee = \$35/family)

Smart Aid is a fair and equitable financial aid application and process for your families and schools designed to help you faithfully allocate financial aid funds or other awards to the right families. The Smart Aid calculation is a proprietary and trusted methodology to ensure each family's calculated contribution is accurate. Smart Aid has redefined the financial aid application and analysis process by introducing the latest technology to make the application for families easier and the awarding for administrators more accurate.

For families:

- Smart Aid has cut the number of questions on the application nearly in half and introduced a smart application that will ask families questions that are only pertinent to their situation.
- We've designed a mobile application so families can apply for financial aid anywhere. Even at a school's open house!
- If the family allows, we can pull their tax information directly from the IRS instead of asking them to gather and submit their documentation.

For administrators:

- Each family's application comes to you verified with a confidence score so you know how sure we are that we have the family's contribution correct based on the information we've received from the family.
- We also include a HIL Profile for each family which outlines their Hobbies, Interests, and Lifestyle so you can get a complete picture of a family's circumstances.
- Our grant management feature allows you to automatically award based on set criteria instead of awarding by individual student. You can always make any changes you need in an applicant's file or on our award page.
- Once awards are finalized you can send the awards to Smart Tuition to automatically populate your families' tuition management accounts.

As a Preferred vendor, Smart Tuition also commits to the following:

- Assign a Senior Vice President to be the primary diocesan contact for project management and satisfactory completion of all deliverables;
- Assign a Regional Vice President who would be available to meet individually with schools to explain how the Smart Tuition service works;
- Conduct web-based training for all schools as needed, in addition to offering customized online training sessions for all Diocesan schools;
- Attend Parent Information Nights at school or regional level via webinar or teleconference as needed;
- Assign all Diocesan schools, regardless of size, to Smart's Major Accounts Account Management Team. This team has the lowest ratio of schools to Account Managers. Major Accounts' team members are expected to visit with the schools they serve in person on an annual basis.

Pricing and Terms

The terms of this Agreement shall be three years starting with the 2015-2016 academic year and running through the conclusion of the 2017-2018 academic year. This pricing will extend to any Catholic school of the Dioceses of Rockville Centre utilizing the services of Smart Tuition.

Preferred Vendor Status Diocese of Rockville Centre	
Tuition Management	\$36 per family for monthly payment plans
Smart Aid	\$0 per application
Follow-up Fee	\$40 per family
One-Time Payment Plans (Annual Payers)	\$0
ParishSoft ConnectNOW*	Smart Tuition will reimburse schools for the ParishSoft ConnectNOW monthly subscription fees per school
QuickBooks and Qvinci*	Smart Tuition will reimburse schools for the QuickBooks Online and Qvinci monthly subscription fees per school that subscribes to this service at Smart Tuition's discounted subscription rate

*Schools may be reimbursed for monthly subscription fees for either ParishSoft ConnectNOW or QuickBooks Online and Qvinci, but not both.

Smart Tuition will serve as Preferred Provider of Services for Diocese of Rockville Centre and all its affiliates.

As a Preferred Vendor, Smart Tuition will execute or has executed Professional Service Agreements with individual schools in order to capture specific funds transfer information as well as school contact information.

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