

BID ADDENDUM**FAILURE TO RETURN THIS BID ADDENDUM IN ACCORDANCE WITH INSTRUCTIONS MAY SUBJECT YOUR BID TO REJECTION ON THE AFFECTED ITEM(S)/SERVICES.**

UNC System Office Bid Number: **68-SOSSSA1123**
 Prospective Bidder:
 Bid Opening Date/Time: December 8, 2023, at noon EST
 Addendum Number: **01**
 Addendum Date: February 13, 2023

The University of North Carolina issues this addendum to University of North Carolina RFQ 68-SOSSSA1123 and to provide answers for questions submitted by vendors. The vendor questions and answers are:

RFP Reference Section	Question	Answer
5.0 Specifications and Scope of Work	What is the impetus for developing a new vision for operating shared services at the System level (e.g., improving the employee experience, reducing costs, reduce risk/increase compliance, etc.)? Who is the sponsor of the project (e.g., board of trustees, chancellor)? Have impacted employees and stakeholders been informed of the assessment?	The impetus for the work is to clearly define a long-term strategy for success to better provide cost-effective and timely services to our constituent institutions. The services today have been developed over time in silos without a single vision from a System Office perspective. The sponsor of the project is the Chief Operating Officer. The System Office business owners of the different services are aware of the work. Specific employees within each service have not been directly informed.
5.0 Specifications and Scope of Work	What functions (e.g., IT, HR, Facilities, Research, etc.) are in the current shared services operating model and how many staff work in the University of North Carolina System's shared services operations? Do all University of North Carolina System institutions/affiliates leverage existing shared services functions (or are only a subset of institutions/affiliates leveraging the functions today)?	See the functional chart in the attachment. There are 54 employees across the departments dedicated to providing the services. Only a subset of institutions uses the different services, and the level of participation varies by each campus.

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5.0 Specifications and Scope of Work	Does the University of North Carolina System know which functions/services it would like assessed for inclusion in shared services or will part of the project be recommending which functions/services should be included?	The purpose of this scope of work is to consider organizational structure and service models for the System Office, not analyzing each current shared service and whether these services should continue. Current services outlined in the functional chart are in the attachment and will be considered as part of this work in terms of structure.
5.0 Specifications and Scope of Work	Does the System have customer care technologies in place (e.g., ServiceNow, Salesforce, etc.) to track incoming questions, provide knowledge content to users, etc.?	The shared services delivered out of the System Office do not have a consistent customer care technology. The service depends on the method for tracking incoming questions and providing content. Each individual service has specific customer care processes. For instance, some of the IT shared services utilize the System Office ticketing system while our Executive Search service is more white glove with 1:1 interaction.
5.0 Specifications and Scope of Work	Will the consulting partner have access to stakeholders within the University System institutions/affiliates for interviews, data requests, etc.?	The Deputy Chief Operating Officer will be a central point of contact for interview and data requests.
5.0 Specifications and Scope of Work	What baseline data will be available to the consulting partner to help understand existing operations and performance (e.g., costs, volumes, satisfaction survey data, etc.)?	The purpose of this scope of work is to consider organizational structure and service models for the System Office, not analyzing each current shared service and whether these services should continue. Data can be provided depending on the availability and applicability to the work. Each service has varying degrees of easily accessible data.
5.0 Specifications and Scope of Work	Is a high-level business case included in the scope of this analysis?	No, a business case is not included in the scope of this analysis.
2.6 Quote Submittal	Section 2.6 specifies that the proposal/quote should be submitted both via email and in person. Are both an in person and virtual submissions required?	Only email submissions are required and the University will only accept quotes submitted via email to rbmyers@northcarolina.edu with a Cc: to rwterry@northcarolina.edu. No physical quote is required.
1. Purpose and Background	What shared services are currently provided to constituent institutions? If possible, please group by function.	See the functional chart in the attachment.
1. Purpose and Background	How many FTEs currently provide the shared services?	There are 54 employees involved in some capacity across the shared services.

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1. Purpose and Background	Are other functions actively transitioning work into the existing center?	There is not one central location for shared services. Each service is currently operated within each department. See the functional chart in the attachment.
1. Purpose and Background	Is the existing shared service center entirely supported by captive resources, or is there any current / planned leverage of outsourcing?	Existing resources are all employees – whether receipts supported, or state funded. There is not a current plan to outsource these resources.
1. Purpose and Background	Are shared services employees co-located? If so, where?	No, most employees are remote or hybrid.
1. Purpose and Background	How long ago were existing shared processes transitioned?	The University declines to answer this question.
1. Purpose and Background	Would you describe the transition of work to existing center a success? What were some of the successes and/or challenges you faced?	The University declines to answer this question.
1. Purpose and Background	Will you please elaborate on the current structure of the existing shared services organization, including the relationship to the business?	See the functional chart in the attachment. Only a subset of institutions use the different services and the level of participation varies by each campus. Each shared service interacts with constituent institutions differently. There is some central invoicing and SLA development across the services based in the Operations Division. Customer service, communications, budgeting, and strategy remain in the individual business units.
1. Purpose and Background	Are additional functions targeted for transition to shared services? If so, which functions?	The University declines to answer this question.
1. Purpose and Background	Is the transition of work to shared services agreed too throughout the organization (all 17 locations), or do some universities have the option to "opt out"?	Universities have the option to opt out of services provided from the System Office.
1. Purpose and Background	Will you please provide a high-level overview of the system landscape? Are all universities using the same ERP and key operational systems?	UNC System's predominant ERP platform is Banner, either hosted by the UNC System Office or at the individual institution. Banner was implemented in 2008, embracing the individual uniqueness of each campus and opting to have individual instances of Banner at each of the constituent institutions. Only NC State University and UNC Chapel Hill use Peoplesoft.
2.7 Quote Contents	Is there a specific link for the "Certification for Contracts, Grants, Loans, and Cooperative	The Certification for Contracts, Grants, Loans, and Cooperative Agreements and OMB Standard Form LLL is not required for this Request for Quote. Vendors shall disregard Section 2.7(h) of the Request for Quote.

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	Agreements" that we need to sign?	
5. Specifications and Scope of Work	What is the expected, primary work location for the project team? Is there a strong preference on the mix of remote vs on-site?	There is no preference for primary work location.
5. Specifications and Scope of Work	What is the level of confidentiality for this phase? Will site visits be possible?	Site visits to the main office in Raleigh are possible. The work on this phase is not confidential.
5. Specifications and Scope of Work	Will you please provide a high-level overview of the process for finalizing the leadership decision to move forward following this visioning phase of work? Is there an expected time frame for moving to the next phase?	The Chief Operating Office has been charged with refining the vision for shared services. There is not a defined time frame for moving to a next phase. We expect work under this contract to help us determine if and how we should consider moving forward.
7.0 Attachments	Is there a specific pricing form we should populate? A form is referenced in an earlier section, but we do not see a link (similar to the other links in this section).	There is not a specific pricing form required for this Request for Quote. Please provide the total cost to the State for complete performance in accordance with the requirements and specifications herein, including all applicable charges for handling, transportation, administrative and other similar fees.
3.0 Method of Award	What are the evaluation criteria being used to select the consulting firm for this project?	As noted in Section 3.1 of the Request for Quote, "North Carolina G.S. 143-52 provides a general list of criteria the State shall use to award contracts, as supplemented by the additional criteria herein. The Goods or Services being procured shall dictate the application and order of criteria; however, all award decisions shall be in the State's best interest." North Carolina G.S. 143-52 lists the following criteria: "prices offered; best value, as the term is defined in G.S. 143-135.9(a)(1); the quality of the articles offered; the general reputation and performance capabilities of the bidders; the substantial conformity with the specifications and other conditions set forth in the request for bids; the suitability of the articles for the intended use; the personal or related services needed; the transportation charges; the date or dates of delivery and performance; and such other factor(s) deemed pertinent or peculiar to the purchase in question, which if controlling shall be made a matter of record." N.C. Gen. Stat. §143-52(a). https://www.ncleg.net/enactedlegislation/statutes/html/bysection/chapter_143/gs_143-52.html There are no additional evaluation criteria for this Request for Quote.
1.0 Purpose and Background	Per the RFP, "The UNC System Office currently provides multiple shared services to constituent institutions. As these services continue to	The purpose of this scope of work is to consider organizational structure and service models for the System Office, not analyzing each current shared service and whether these services should continue. Current services outlined in the functional chart are in the attachment and will be considered as part of this work in terms of structure.

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	<p>evolve, the UNC System is seeking a vendor to provide recommendations for a long-term strategy and operating model at the System Office to continue supporting our institutions."</p> <p>What services are part of this scope, that should be reviewed for the shared services strategy?</p>	
4.1 Pricing	Have you set a target budget amount that this project needs to fall within?	The University declines to answer this question.
General	1. Will the firm that is selected to assist the UNC System with developing a vision and strategy for shared services be eligible to support implementation of this vision, should the System decide to go forward?	The University declines to answer this question.
General	2. What functions are in scope – back office administrative functions or other student/faculty supporting functions as well (e.g., enrollment, development, alumni relations, career services, research administration)?	The purpose of this scope of work is to consider organizational structure and service models for the System Office, not analyzing each current shared service and whether these services should continue. The work should consider any functions needed at the System Office level to successfully run the different shared services.
General	3. Is IT in scope given the current ERP readiness assessment being conducted?	The existing IT shared services are in scope for this project; moving to a central ERP is not in scope.
General	4. Are all campuses in scope or a subset?	Campuses will not be included as part of the project. The purpose of the project is to identify a vision and roadmap for an operating model at the System Office to provide cost-effective and timely services to institutions.
General	5. How do you envision including the campuses in this project? Or are you looking to the consulting firm to make a recommendation?	Campuses will not be included as part of the project. The purpose of the project is to identify a vision and roadmap for an operating model at the System Office to provide cost-effective and timely services to institutions.
General	6. Who will be the client? Will there be a Steering Committee for the project and if yes, what will be the composition of this group?	The Chief Operating Officer is the client. There will be no steering committee for the project.
General	7. Do all references need to be higher education	References from other sectors can be included the response.

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	references or can they include other sectors as well?	
General	6. Who will be the client? Will there be a Steering Committee for the project and if yes, what will be the composition of this group?	The Chief Operating Officer is the client. There will be no steering committee for the project.
General	7. Do all references need to be higher education references or can they include other sectors as well?	References from other sectors can be included the response.
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	What shared services organizations currently exist? Are there any that are university-specific rather than system-wide? 1	Current services are outlined in the functional chart in the attachment. Shared services housed and operated within individual institutions are not in scope of this work.
	Is the expectation of UNC that this initial phase of work span the entire 6-month contract duration, or are vendors free to propose shorter durations if appropriate? 1.1	Vendors are free to propose shorter durations.
Scope of Work	Do you have a target number of stakeholders that you wish to interview and engage with as part of this project?	We anticipate the majority of the work to be directly with the Chief Operating Officer and the current business owners as needed.
Scope of Work	Do the "IT Services and Functions" listed on your website (https://www.northcarolina.edu/offices-and-services/information-technology/it-services-and-functions/) accurately capture the scope of your current services?	Some of the services listed on the referenced website are not considered a shared service, but more functions and work provided by the System Office IT team to campuses. Current services are outlined in the functional chart in the attachment.
Scope of Work	Do you wish to include a cost/financial analysis of the current and future services as part of this project?	A cost/financial analysis is not considered in scope for this project. High level benefits should be identified as part of the visioning process.
	Will the scope of work include UNC Councils or Working Groups? 5	No.

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	Will the scope of work include UNC affiliates, such as UNC-TV, the North Carolina Arboretum, the NC State Education Assistance Authority, the University of North Carolina Press, and Go Global NC?	No.
	Will the scope of work include UNC Health?	No.
2.6 Quote Submittal	Does the System require a printed, hand delivered quote?	No.
	Is the vendor expected to also provide cost estimates for roadmap implementation?	No.
	During contract duration, will UNC retain responsibility for necessary communications (e.g., email, townhalls, newsletters, etc.) to stakeholders across the UNC system regarding this scope of work? Will UNC require any support from the vendor for stakeholder communications?	Yes, UNC will retain responsibility for necessary communications. No, support is not needed. The scope of work is visioning for how the System Office can better structure our approach to shared services. Communication to campuses is not expected during this work.
	Are there any external partners, affiliates, or resellers we should be aware of as it relates to this initiative? If so, who?	No.
	What UNC resources will be supporting this initiative and will they be doing so in a part-time or full-time capacity? Are any UNC resources assigned to this initiative from individual institutions, or are they all UNC system staff?	The scope of work is visioning for how the System Office can better structure our approach to shared services. Communication and participation from individual campuses is not expected. The Chief Operating Officer and pertinent business owners will participate as needed. All will be in a part time capacity.
2.6 QUOTE SUBMITTAL	Per the instructions, vendors are to email an electronically signed quote to rbmyers@northcarolina.edu with a Cc: to rwterry@northcarolina.edu. Are vendors also expected to submit a physical copy of the signed quote to your	Only email submissions are required and the University will only accept quotes submitted via email to rbmyers@northcarolina.edu with a Cc: to rwterry@northcarolina.edu. No physical quote is required.

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	office? (Page 7- 'It is the responsibility of the Vendor to have the signed quote physically in this Office by the specified time and date of opening, regardless of the method of delivery'.)	
1.0 PURPOSE AND BACKGRO UND	Can you please share whether or not there are existing service level agreements (SLAs) or policies in place for the shared services currently provided by the individual System Office Operations Departments to constituent institutions?	Some, but not all, services have existing SLAs. This is similar in terms of cost models and billing – some, but not all, services have a defined cost model.
1.1 CONTRAC T TERM	The RFQ noted a contract award date of 12/15/2023. Do you expect the project to begin prior to year-end 2023?	We anticipate this project to hold a kick-off prior to the holiday and continue the project in full in January.
4.1	Does UNC have an allocated budget or budget threshold for this initiative that they can share?	The University declines to answer this question.
4.1	Does UNC require or have a preference for a specific contract and billing structure (e.g., fixed fee, time & material, time & material not to exceed, etc.)?	There is a preference for a fixed fee.
General	8. What is the need for an independent operating model and shared services process perspective, in consideration of the underlying technology implementation to support the future state design?	The scope of work is visioning for how the System Office can better structure our operating approach to shared services independent of the underlying technology.

All other information contained in the RFQ remains the same.

INSTRUCTIONS:

1. Return one properly executed copy of this addendum **prior** to the Bid Opening Date/ Time listed above.
2. Please make the following change(s) in the bid referenced above:

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3. Check **ONE** of the following options:

☐

Bid has **not** been submitted. **Any changes** resulting from this addendum are included in our bid.

☐

Bid has already been submitted. **No changes** resulted from this addendum.

☐

Bid has already been submitted. Changes resulting from this addendum are as follows.

Execute Addendum:

Bidder: _____

Authorized Signature: _____ **Date:** _____

Name and Title (Typed): _____

Current Shared Services and Reporting Structure

