	REQUEST FOR PROPOSALS #66-24042 SB
UNIVERSITY OF NORTH CAROLINA CHARLOTTE	University of North Carolina at Charlotte Purchasing Office Reese Building, 3rd Floor 9201 University City Boulevard Charlotte, North Carolina 28223-0001
Addendum Issue Date: January 5, 2024	Due Date: **Thursday, January 18, 2024 by 2:00 PM ET**
Purchasing Agent: Scott Brechtel	Transfer Articulation Solution & Automation
ADDENDUM #1	

This addendum is issued to answer questions posed regarding this solicitation.

Q1.) Could you clarify which details, requirements, or aspects of the RFP changed between its first issuance in Summer 2023 and this second issuance? The requirements don't appear significantly different, so we are curious as to the rationale for the re-release; alternatively, perhaps there is a substantial difference we are overlooking?
A.) The only difference is the addition of 3 priority values of "Mandatory", "Desired", and "Future"; and inclusion of future needs from our Graduate School.

Q2 What is the reason why the earlier RFP (Summer 2023) was canceled and reissued?
A.) The University's OneIT group was not involved from the initiation of the earlier RFP and was not comfortable approving moving forward with an award without their complete involvement from the beginning of the RFP process.

Q3.) Should vendors' solutions include mechanisms and pricing for providing the full end-to-end Banner integration technology? Or should vendors assume that their solutions will simply provide the data in a suitable format for UNCC IT to perform the Banner integration using tools of its own choosing?
A.) The preference is for the first option. Having an out-of-the-box full integration is preferred. If an out-of-the-box integration is not possible, please provide the cost involved in adding that functionality.

Q4.) The Q&A from the Summer 2023 RFP stated that UNCC expected to use APIs to integrate with Banner. Will UNCC deploy or build those APIs, or do you expect vendors' solutions to include delivering the APIs to perform the Banner integration?
A.) The preference is for the solution to include APIs for priorities marked Mandatory. Note: we are currently not using ETHOS but are considering it.

Q5.) How many transcripts do you process on average per year? This number would include multiple transcripts coming in per student.
A.) 15,500 high school transcripts; 77,000 college transcripts

Q6.) Can you describe your current process in depth, as it operates today?
A.) Any College and Joint Service Transcripts: Upon application, students submit transcripts for their prior work. After all transcripts are received, the student moves into a Slate queue, identifying they are in need of transcript articulation. Charlotte staff view the transcripts within Slate and manually enter each course from each of the student's transcripts into Ellucian (Banner). Pauses occur when courses do not exist in our database and require equivalency research. Course and equivalencies are then built into Banner, as they are determined. When all courses have been entered, staff run the articulation process within Banner. If all is well, the equivalencies are rolled to academic history in Banner. From this point, Banner and all subsequent systems can access/view the student's transfer credit. Credit is also pushed back to Slate so that the UG Admissions Office can determine the student's admissibility. Students can also see their evaluated coursework within the Slate external user experience.

Readmission student transcript evaluation mirrors what is outlined above but also includes transcripts stored in Content 7 (Perceptive ImageNow document storage system).

As updated transcripts, with additional terms/courses completed after the initial articulation, are received, previously articulated coursework is unrolled from academic history, researched if not in our database, additional term data added, and finally, rolled again to academic history.

High School and international transcripts/translations: High school transcripts are uploaded into Slate (mostly through APIs with various vendors). They enter into a bin where our Operations team reviews them for UNC System Minimum Course Requirements. During this stage, the Operations team also recalculates an academic GPA for all non-public North Carolina high schools and all out-of-state high school applicants. (We do not recalculate academic GPAs for North Carolina public school students, which comprise the bulk of our application pool.) The Operations team recalculates the GPA through a form in Slate by manually entering in each core academic course grade from grades 9-11. Once this step is completed, the application moves forward for admission review. Requested usage outlined in this RFP is proposed. The current review is performed by a visual inspection of the transcript and decided without any database interactions.

Q7.) Are you using any automated tools to help with the process today? If mentioned above, please disregard.
A.) We are only utilizing the articulation process as it exists in baseline Banner. This process simply allows entry of the prior college's courses, articulation against the equivalency database in Banner, and rolling to academic history.

Q8.) Does this process currently sit in Banner? If not, where is it sitting currently?
A.) The primary processes reside in Banner, but an integration exists now to pull Banner evaluated history into Slate after articulation is complete. To obtain transcripts, staff utilize both Content 7 (Perceptive ImageNow) document storage and Slate Materials.

Q9.) Please name all of the systems you would like the new solution to integrate with.
A.) Banner (Ellucian), Perceptive Content (Hyland), and Slate (Technolutions)

Q10.) Other than manual data entry, what are the key problems you are trying to solve around this process?
A.) Charlotte is unable to manually enter prior student credit in a timely manner that allows for quick admission decisioning and sharing evaluations with students to aid in their own decisioning that Charlotte is their best choice. Manual data entry results in errors and is a terrible use of personnel resources. Manually recalculating academic GPAs for non-public and out-of-state high school students creates a bottleneck in the admissions process and our out-of-state population is growing every year.

Q11.) Where does the equivalency database live today, if applicable?
A.) The equivalency database resides in Banner only.

Q12.) In the description you mention wanting the solution to cater to both incoming and currently enrolled students, do you have a primary focus on one to begin with or would you like to implement both at the same time?
A.) The preference would be both, however, our primary and most immediate need is for undergraduate incoming student credit evaluations.

Q13.) As a Banner customer do you use DegreeWorks for Degree auditing?
A.) Yes.

Q14.) Where are your current transcripts stored and uploaded? How would you like those to be stored/uploaded in the future, if you want that to change?
A.) All transcripts are maintained in Slate for new, incoming students. Upon matriculation, these transcripts are moved to Perceptive Content until the document's retention expires. For continuing students who study elsewhere (transient study), their transcripts only exist in Perceptive Content, as they do not require Slate handling.

Q15.) Row 53/Slate-Technolutions: are you requiring delivery to & from Slate? Can you explain more about the current process?
A.) This is outlined in an earlier answer. Essentially, Slate maintains the transcript as part of the application process. Currently enrolled student transcripts are maintained exclusively in Perceptive Content. The solution will need to access the transcript, scrape the data from the transcript, and push to Banner.

Upon completion and the equivalent credit resides in academic history within Banner, all transferred courses are pushed back to Slate. There is already a process in place for this final step, and this final Slate ingestion step is not necessary for continuing students. It is not anticipated that this step needs to be included in the requested solution.

Q16.) Will the award be sole-sourced?
A.) The award will be made to the firm with the overall highest evaluation resulting from this competitive RFP process, and it is anticipated that there will be an award made to only one firm.

Q17.) Will international transcripts be translated to American English prior to conversion?
A.) Yes, applicants are required to submit an official translation of transcripts.

Q18. What is the annual percentage (or total number) of international transcripts that UNC Charlotte processes?
A.) The undergraduate international transfer student population is quite small compared to domestic students. For the Spring, Summer, and Fall 2023 terms combined, we received 2,173 international college transcript documents.

Q19.) Does UNC Charlotte work with a preferred vendor or multiple vendors for international transcript translation?
A.) Charlotte recommends students use International Education Evaluations, Education Perspectives, Educational Credential Evaluators or SpanTran. Charlotte only requires that the vendor be NACES accredited and the evaluation must be a course-by-course evaluation.

Q20.) For international transcripts, what evaluation information are you currently capturing?
A.) Charlotte is not currently utilizing an equivalency database for international evaluation. Each English-translated course is reviewed independently at that moment and manually entered into Banner.

Q21.) For military transcripts, do you process transcripts for all military branches?
A.) Yes.

Q22.) For military transcripts, do you require a standard output file across all branches?
A.) With the exception of Air University (Community College of the Air Force), all branches utilize a standard Joint Services Transcript format. Charlotte stores equivalencies in our database using the ACE assigned training number. (Example: AR 22010399V01 - Army Basic Training) Handling of military joint service transcripts mirrors the same process outlined for college transcripts.

Q23.) What is the annual percentage (or total number) of military transcripts that UNC Charlotte processes?
A.) Total number is 55 actual military transcripts between Jan 1, 2023 - Jan 1, 2024.

Q24.) Item 4 Distribution across the file formats?
A.) Charlotte anticipates a state-wide push in the coming years for more transcript sharing amongst the University of North Carolina and North Carolina Community College campuses. This is a welcomed future direction and has been on our wish list for

several years. It is unclear what file format will be utilized. In addition, some campuses across the country are already sharing data in this manner. It is expected that if a campus sends data instead of PDF or paper transcripts, the final solution will be able to be handled in a similar fashion. Some of the file formats that may be present are XML, EDI, or JSON.

Q25.) Item 5 Slate integration who is UNC Charlotte working with: Partner? University IT? Project Team?
A.) Charlotte's OneIT manages Slate integrations.

Q26.) Item 6 Please define batch. What is the frequency of batch files? Define Batch size, same school or from different schools?
A.) Batch handling, in this case, refers to what a solution might do with transcripts coming in since the last handling. This is not Charlotte terminology, as we do not handle it in batch now. This may be a mute point if the solution is actively looking for new transcripts in a queue every moment. If the solution is only looking every two hours, once a day, etc., we anticipate it will pull those transcripts as a batch and load them for either immediate handling and resolution or queuing up for additional review (cases where the course is not present in our database or it is having trouble determining a B from a D). Depending on the solution, the term 'batch' may not be relevant.

Q27.) Item 7 Please be more descriptive on the request. Name, address etc. What is required?
A.) Charlotte needs to be 100% sure that the prior coursework belongs to the student and institution before adding it to the student's academic record in Banner. Utilizing the header data on a transcript will help to ensure the accuracy of the student's evaluation. Capturing the name of the institution, address data (as oftentimes institutional campus names are similar), student name, etc., is important. But also note that the transcript document maintained in Slate and/or Perceptive Content will already have some identifying document keys attached. An additional match would ensure the student and institution are the same.

Q28.) Item 8 Is this tool separate from Banner or within Banner? What version of Banner is being used at UNC-Charlotte. Can Banner accept XML/EDL data format? Will the Administrator allow us access to Banner?
A.) We are requesting that the solution, possibly through an API, actually perform the "Roll to History" function in Banner upon articulation completion. This function is a selection in Banner. As of this response, Charlotte is on version 8.27 & 9.3.30.0.5 of Banner Student. An upgrade to 8.28 and subsequently Banner 9 is likely to happen before solution implementation. We can accept XML via MuleSoft.The final awarded solution will have the ability to interact with Banner. We more than likely will not allow access to Banner, we ask that you work in coordination with our OneIT team.

Q29.) Item 9 How is UNC Charlotte calculating confidence thresholds?
A.) Charlotte understands that 100% confidence is unrealistic and dependent on the clarity of the original document, but an upper 90% confidence threshold is anticipated.

To ensure a stronger confidence percentage, we will expect the vendor to also review our scanning functions for transcripts received on paper.

Q30.) Item 11 Is UNC Charlotte prepared to allow a vendor to have access for read and write capabilities?
A.) Yes. Writing the transcript data to Banner is the foundation of this RFP.

Q31.) Can you give us an outline of the permissions for us to access Banner?
      Item 12 Can we get a sample of the equivalency table?
      Item 12 What tables are we matching to in Banner?
A.) We more than likely will not allow access to Banner, we ask that you work in coordination with our OneIT team.

Equivalency Table Example - https://docs.google.com/document/d/1ptcFz-aFHjWJ0R1AQRh8mse_4Y6b4M7ul-MJyuPZGBA/edit?usp=sharing
Banner Tables - Predominantly STVSBGI, SPRIDEN, SHBTATC, SHRTATC, SHRTRTK, SHRTRIT, but could be others.

Q32.) How many FTE's will be supporting implementation and ongoing after implementation?
      Partner, University IT or Project leaders?
A.) 9 FTEs are currently supporting implementation. This includes OneIT, Registrar, UG & GR Admission partners, in addition to Project Manager. Post-implementation we expect to have 22 Registrar and 26 Admission users with as-needed OneIT support. 5-10 will be identified as super-users.

Q33.) What type of security software is being used by UNC Charlotte. What permissions will be granted?
A.) We more than likely will not allow access to Banner, we ask that you work in coordination with our OneIT team.

Q34.) Item 26 How many competitive majors are there? Do they have a predefined set of courses? Do you have existing tables ie. Business courses
A.) Business, Nursing, and Engineering are all competitive majors for transfer students at UNC Charlotte. The major we would use this technology for is Business, where we are currently manually recalculating a "Business Progression GPA" based on any Business prerequisite coursework that a student has previously attempted. Those courses are any that are equivalent to the following courses at UNC Charlotte: Principles of Accounting I, Principles of Accounting II, Principles of Microeconomics, Principles of Macroeconomics, Calculus (or Calculus I), Elements of Statistics, Intro to Business Computing, and Intro to Business and Professional Development.

1. We use all attempts at business progression courses from all institutions. We count INC and WF as F's and any other indication of a failing grade (some schools use E or X)
2. If the student has attempted the course more than two times (even across schools), they will never be admissible.

3. Some courses are 4 credits (Acctg, Calc, Stats) at other schools, we count these as 3 credits, so credits and quality points need to be adjusted accordingly.

Students must have a 2.5 or higher GPA overall from all institutions attended (unless their most recent coursework culminated in an associates or bachelor's degree- in which case we use the degree GPA). If they completed coursework after a degree, then we do a long cumulative GPA calculation. And, they must have a 2.5 GPA in their progression courses with less than 2 attempts at each course. We count every attempt in the calculation.

Q35.) Can UNC Charlotte define the reporting metrics that are needed?
A.) Please see Q34 for the criteria needed for a Business progression recalculation.

Q36.) Item 55 In identifying the connection is this part of the implementation team or the vendor or Professional Services engagement?
A.) The connection depends on the vendor. We would like to know what connections the vendor has in place and is able to accommodate to ensure data moves seamlessly.

Q37.) Can UNC Charlotte provide transcript volume by month and type?
A.) We do not have a report that provides specific breakdowns of transcript type by month. Our transfer application deadlines are July 1 for Fall and November 15 for Spring, so we typically see an influx of transcripts submitted around those dates. We also experience large influxes of final transcripts that need to be articulated in June for the Fall and December for Spring. The majority of our non-public and out-of-state high school transcripts come in just before our Early Action deadline for first-year students on November 1.

A SIGNED COPY OF THIS ADDENDUM MUST BE INCLUDED WITH YOUR PROPOSAL

COMPANY NAME	DATE
PRINTED NAME	SIGNATURE