ADDENDUM

SOLICITATION NO.: P2023-011952SL	**SOLICITATION NAME: TRANSCRIPT PROCESSING SOLUTION**
ADDENDUM NO.: 1	**DUE DATE AND TIME: JULY 14, 2023 (2:00 PM)**
DATE: JULY 5, 2023	**PROCUREMENT ANALYST: SCOTT LOMMERS**

The solicitation named above is hereby modified as follows:

1. Request for Proposal, Page 27, titled "Exhibit E – Security Questionnaire", is deleted and replaced with the following attachment: "Exhibit E – Security Assessment."

The following questions were received with regard to the solicitation named above. OSU has provided answers below to each question, but the RFP or contract documents have not been modified as a result.

1. Please confirm the annual volume of transcripts (number of pages) you are looking to capture and extract data from.

   Approximately 17,000 college transcripts and 35,000 high school transcripts. We do not have a statistic for number of actual pages.

2. The RFP mentions a requirement to organize extracted data into categories for further review. Could you provide more details and give some examples of what some of those categories might be to illustrate the expected functionality?

   Our primary concern here is whether or not scanning results will display/separate built vs. unbuilt courses before feeding to Banner. Additionally though, can the software organize course data extracted into course subjects, for example? Can it perform rules based on that data to send data to Slate or Banner – like saying "Meets Secondary Language Requirement" if it sees two terms of a secondary language? For example, could it recalculate a GPA using select courses?

3. The requirements do not describe the contractor's expected responsibilities in relation to the development of the integration to Banner or Slate. Is the contractor expected only to provide the extracted data in a suitable format so that OSU internal IT or other integration specialists may then take the data and perform the integration into the receiving systems? Or is the contractor expected to build and deliver the actual integrations?

   The contractor is only expected to provide the extracted data in a suitable format that OSU staff can effectively integrate it into the receiving systems.

4. In regard to Banner, is there an expected means of integration involving, for example, Ethos, file import, and/or use of a third-party vendor for providing Banner integration?

Integration with Banner would be accomplished in-house in cooperation with our central IT unit (UIT), so there wouldn't be any third-party software involved.

5. Please explain or give examples of what this requirement means: "Ability to pre-populate data into a dynamic format." Is this different from the ability to export data in a desired format?

   Before data is exported, how will the data scanned/collected be displayed for us? Does the software provide a worksheet or other interface that allows staff to check the data being extracted and manually add, correct, or update the result?

6. Are OSU's course equivalency tables stored in Banner SHATATR as the system of record? If not, what are the sources for the equivalency tables?

   Yes, transfer course equivalencies are stored in Banner SHATATR.

7. In regard to the requirement "Able to read high school transcripts in the near future," is the response to include pricing for high school extraction or only to confirm that extraction is available in the future? Also, is there an understanding that expansion of the functionality to include high school extraction may, at that future time, require additional cost?

   We are searching for a software that can help us with our college transcripts right now, with the hope that it can, in the future, help process high school transcripts. Please provide information about your software's ability to do so and how mature this solution is, and how pricing is impacted by the addition of this service.

8. In regard to the item "Able to display report of transferable courses for prospective students," please confirm whether this means the system shall be student-facing in a self-service mode, or is this transferability report intended only for administrative access?

   A student-facing, self-service module that allows students to upload their unofficial transcripts and receive real-time feedback about projected equivalencies at OSU would be ideal.

9. Regarding Exhibit A: are bidders expected to review and agree or provide red-lines? Or is the contract provided as an FYI?

   Exhibit A is provided as a sample contract and sample terms and conditions. Bidders should review the contract so they are aware of the Statement of Work and the standard terms and conditions, but no red-lining should be done at the bidding stage.

10. Regarding Exhibit B: are you wanting us to sign off on these terms now or showing us what is to come?

    Exhibit B is a required submittal – please see section 5.02.

11. Can you tell us about your current student, financial, and other systems you use within the institution?

    Slate – New student CRM
    Banner – Student, Finance
    On Base imaging
    Degree Works – degree audit
    SalesForce (current student CRM)

12. What is your current FTE? Is it still close to 33,000?

    FTE in Fall 2022 was about 27,600 with 34,292 total students enrolled across our various locations/modalities.

13. How many transcripts do you process in a year?

    Answered in Question #1.

14. Do you have a preference on the RFP response formatting, e.g. Excel or Word?

    As long as the proposer is able to be responsive and responsible, as defined in Section 1.05 of the RFP, to all qualifications and requirements, the format for the response is up to the proposer.

15. Regarding HECVAT – there are several versions of the HECVAT. Are you opposed to bidders submitting the Full version 2.11 with supporting documentation in lieu of the line-item response to the HECVAT included in the RFP?

    OSU will accept the HECVAT, HECVAT Lite or equivalent Proposer security assessment to satisfy this requirement. See the above Solicitation Modification, #1.

16. Exhibit A is listed as an sample Master Service Agreement (MSA). We use our client's MSA. Can we use the sample MSA provided as the working document? If yes, do you require MSA initial red-lines submitted at the time of the RFP submission?

    Yes, the sample contract is provided as an example of the contract that will be used for the agreement with the winning proposer. Do not red-line the sample contract in your proposal – any potential negotiations will take place after a winning proposer is chosen.

17. What is the desired turn around time for transfer and new students?

    Our ideal turnaround for providing a new applicant a full articulation of their transfer credits is two weeks after applying and providing official transcripts. Similarly, we'd like to assign transfer credit to existing students who have taken courses elsewhere within two weeks of receipt of the official transcript.

18. Regarding section 5.02, Is it safe to assume that a proposer with experience providing transcript reading software also meets the preferred qualification criteria?

    Most likely yes, but the preferred qualifications speak to the expertise and experience vendor has working in the higher education space, both in customer service and support, and in their software solution.

19. What is meant by "organizing extracted data into categories for further review"? What are the "categories"?

    Answered in Question #2.

20. Regarding "Capable of generating both automated and custom reports from queries." Please elaborate; what is meant by "queries"?

Does the software provide the ability to run reports to provide aggregate data so that we can analyze volume, efficiency, errors, etc.? Can we run a report, for example, to evaluate how many transcripts evaluated over a set time period contained a certain data point like a particular course? Or, what percent of courses captured were already built over a period of time?

21. Regarding "ability to pre-populate data into a dynamic format." Please elaborate; is it correct to assume pre-populating data into Banner and Slate? What is meant by a "dynamic format"?

    Answered in Question #5.

22. Our transcript processing solution pricing is based on transcript volumes. Can you give an approximate number of college transcripts that would be processed annually according to the scope of work?

    Answered in Question #1.

Entities are not required to return addendums with their offers but are responsible to make themselves aware of, obtain and incorporate into their final offer any information contained in addendums. Failure to do so may make the offer non-responsive and cause it to be rejected.