

Sole Source/Bid Waiver Justification

Below are the following Sole Source /Bid Waiver Criteria. If your purchase does meet any of the following criteria, please Christopher Kopp, Chief Procurement Officer for further instruction via email at ckopp1@ccc.edu or phone (312) 553-3420.

What is a Sole Source Procurement?

A “sole source” procurement can be defined as any contract entered into without a competitive process, based on a justification that only one known source exists or that only one single supplier can fulfill the requirement. Although states generally do not permit non-competitive procurements by statute, exceptions are allowed where competition is not feasible.

Examples of acceptable exceptions from the competitive procurement process may include:

- ⊗ Only one known source exists for supplies of services or products as determined by documented research.
- ⊗ No other reasonable alternative source exists that meets the CCC requirements.
- ⊗ Only one source meets the business needs of the CCC (e.g., compatibility, unique feature to meet CCC’s business need, etc.)
- ⊗ Procurement of public utility services.

What’s not a Sole Source Procurement?

- ⊗ A CCC requirement for a particular proprietary product or service does not automatically justify a sole source procurement if there is more than one potential bidder or offeror for that item.
- ⊗ A CCC preference for a brand name product does not justify a sole source procurement.
- ⊗ A good’s or service’s “uniqueness” alone may not qualify the producer or supplier of the good or service as a sole provider of a good or service.

What are acceptable considerations for sole source procurements?

CCC reasons for sole sources vary greatly but should fall within the following:

- ⊗ Only one known source that can provide the commodity or service.
- ⊗ Unique source (commodity/service is unique/special in nature)
- ⊗ Compatibility (e.g., a public safety CCC requiring a specific piece of equipment to be compatible with an existing equipment system)
- ⊗ Limited or proprietary systems (i.e. additional licenses, updates, specialized replacement parts, etc.)
- ⊗ A professional expert is requested.
- ⊗ Sales territories or product availability within limited geographic boundaries.

Sole Source/Bid Waiver Justification Application

Name of Requestor: Brittany Burton

Bulletin or Reference Number: BR 33142

Department/School: District - Transfer
Systems (Institutional Effectiveness)

BR 31280

Project Title: Transferology Renewal

Vendor: College Source _____

Email Address: bburton17@ccc.edu

Value of Initial Term, or if a Renewal, Value of this Renewal: \$ 82,698 ☒ **Actual** ☐ Estimated (Attach the proposal received)

Number of Potential/Remaining Renewals: 1

Length of Each Renewal in Months: 27 (will align with TES
renewal therefore price is prorated) BR 33738

Choose one of the following:

☐ New Sole Source

☒ **Sole Source Renewal**

☐ Change Order or Amendment to an Existing Sole Source

Value of All/Remaining Renewals: \$ 82,698

Provide a description of the supplies or services required: Subscription service agreement for Transferology- an online transfer advising tool for students and institutions, with the Transferology Lab providing institution-specific transfer advising and recruitment/enrollment functions. This tool has been recommended by the state of Illinois over a decade and continues to best source to support the transfer initiatives within the state.

Select the Type of Funding to be Used: ☒ **Educational Funds** ☐ Capital Funds ☐ Grant Funds
☐ Other (Explain): _____

This purchase is economically only available from a single source because it is:

- | | |
|--|---|
| <input type="checkbox"/> Art or Entertainment Services or Athletic Events | <input type="checkbox"/> Items Are Needed for Trial Use or Testing |
| <input type="checkbox"/> Compatibility with Existing/current Equipment, Accessories, Replacement Parts or Service | <input type="checkbox"/> Media for Advertising |
| <input type="checkbox"/> Critical Changes to the Existing Contract Are Necessary and Best Accomplished by the Original Contract Holder | <input type="checkbox"/> Organization Memberships (Dues, Fees, Conference Charges Including Mandated Travel and Related Expenses) |
| <input type="checkbox"/> Federal/CCC Grant Requires Contract with Vendor (attach Grant Award Agreement) | <input type="checkbox"/> Public Utility Regulated Services |
| <input type="checkbox"/> Item is Copyrighted or Patented and the Item is Only Available From the Holder – Copyright or Patent Number(s): _____ | <input type="checkbox"/> Radio and Television Broadcast Rights |
| | <input type="checkbox"/> Software License/Upgrade/Maintenance |
| | <input type="checkbox"/> Other (Explain): <u>Compatible with College catalog database called TES (also sole source)</u> |

Has CCC purchased these supplies/services in the past? ☒ **Yes** ☐ No

If yes, STARTING WITH THE MOST RECENT CONTRACT AND WORKING BACKWARD, for the entire relationship with this vendor for this supply or service, list each term, value, short description and type of procurement of each:

Term	Term From:	Term To:	Value	Description	Vendor Selection
One	April 1, 2020	July 31, 2022	\$82,698	Transferology Subscrip Serv Agrmt	Sole Source Renewal
Two	March 31, 2017	March 30, 2020	\$310, 533	Transferology Subscrip Serv Agrmt-BR33142	Sole Source Renewal
Three	March 31, 2014	March 30, 2017	\$93, 831	Transferology Subscrip Serv Agrmt	Sole Source Renewal

If more than 10 years, explain: _____

Business Rationale

1. Provide a detailed explanation of the need for the supplies or services:

Illinois requires an online transfer advising tool that can process complex transfer and degree information from interwoven systems including transfer articulation, degree audit and student information systems across dozens of institutions to make transfer information easily accessible for students, advisors and admission counselors via the web. Transferology is the only tool that meets the State's requirements. The Illinois Board of Higher Education (IBHE) adopted this statewide transfer advising tool and through the Illinois MyCreditsTransfer grant-funded initiative and has grown the number of participating institutions from across the state to 79, up from the initial 66 institutions covered on this grant-funded license agreement. The remaining 13 institutions contract independently with CollegeSource to participate in "transfer" within the state. The license is purchased through the IBHE grantee, the University of Illinois System. This subscription service is inclusive of licensing, commercial hosting of servers, support and maintenance for the 66 Illinois colleges and universities who within the state.

The additional cost is the recruitment function of Transferology, which CCC is covering. It benefits CCC by providing prospective transfer students course articulation information at CCC. The course articulation information is uploaded by TES on a daily basis automatically and ensures the prospective student, their credit will be accepted at CCC. It also shows a visiting student that there are equivalents to a course they want to transfer back to their home institution. It provides CCC data, showing searched courses students are interested in seeking at CCC to ensure that we have course availability for these prospective students.

2. What are the unique features of the supplies or services that are not available in any other product or by any other vendor? Provide specific, quantifiable factors/qualifications:

Transferology is built on a nationwide network that contains the world's largest single collection of course catalogs-- including data for more than 100 million courses, plus the database of ACE credit recommendations for military training, and a catalog of standardized tests available; it provides transfer articulation information for hundreds of accredited higher education institutions; has streamlined dynamic interface functions with various student information, transfer articulation and degree audit systems; and gives participating institutions a nationwide presence for recruiting students by providing personalized answers to whether, how and where their college credit will count in transfer evaluation. Transferology had more than 1,600,000 visits nationally on a yearly basis; over 400,000 of those visits were from Illinois users.

3. If professional services, what are the unique qualifications this vendor possesses? Provide specific, measurable factors/qualifications:

N/A

4. Were alternative supplies or services evaluated? ☒ Yes ☐ No If yes, what were they and why were they unacceptable? Please be specific with regard to features, characteristics, requirements, capabilities and compatibility:

- a. The MyCreditsTransfer (MCT) staff routinely seeks out information on other available online transfer tools. This research includes online searches, regular communication with other states and institutions at national, regional and local conferences, and through association memberships, listservs and interstate professional groups such as the Multistate Collaborative on Military Credit and the Interstate Transfer Coalition. MCT staff speaks with vendors at national conferences, investigates word of mouth reports and stays abreast on trends in transfer and technology solutions. Most recently staff have considered EAB Transfer Collaborative, Clearmaze.net, NewEdInc.com, Franklin University's "My Transfer Credit", Degree Navigator by Decision Academic (a division of CSDC Systems), and the DegreeWorks "Transfer Equivalency Self-Service Module" by Ellucian. The transfer equivalency databases were deemed unacceptable due to the following:

- Insufficient functionality
- Lack of compatibility with a wide enough variety of student information, transfer articulation and degree audit systems
- Limited availability
- Significant cost. Illinois MyCreditsTransfer is grant-funded by the Illinois Board of Higher Education (IBHE). The initial investment to license a statewide system that includes all Illinois public universities and community colleges, IAI and others was made several years ago. There are no resources available for initiation, implementation, promotion, collaboration/coordination, training and maintenance of a new statewide transfer advising system.

Transferology is built on a nationwide network that contains the world's largest collection of course catalogs. These catalogs include data for more than 100 million courses, American Council of Education (ACE) credits, military training, and standardized tests. The catalogs provide transfer articulation information for hundreds of accredited higher education institutions; streamlined dynamic interface functions with various student information, transfer articulation and degree audit systems; and give participating institutions a nationwide presence for recruiting students by providing personalized answers to how their college credits will transfer.

b. If no, why were alternatives not evaluated? _____

5. What efforts were made to get the best possible price?

CollegeSource guarantees CCC a discounted rate because CCC has more than one of their products (Transferology and TES). Illinois also pays for part of the Transferology license which greatly reduces CCC contribution to a full license. Illinois has a discount because, the state is grandfathered as an early adopter and has retained its statewide license throughout Transferology's redevelopment and enhancement phases. and due to multi-year renewals. The result is greatly reduced cost, saving thousands of dollars annually.

6. Will this purchase obligate the CCC to this vendor for future purchases such as maintenance, licensing or continuing need? ☐ Yes ☒ No

a. If yes, please provide details regarding future obligations and/or needs:

7. Why is the price for this purchase considered to be fair and reasonable?

CollegeSource keeps cost of business increases to a reasonable rate of approximately 3%, when applied at all. They continue to expand the functionality and enhance features in Transferology based on user feedback. CollegeSource has expanded the interface of Transferology with other systems. Further they provide excellent standards of security and quality for data collection, normalization and publication while assuring accuracy and timeliness. This provides continuity of transfer advising information for the more than 1,600,000 site visits nationally • over 400,000 of those visits are from within Illinois.

8. If this is a renewal, describe why circumstances are such that competitive selection is still not an alternative since awarding the original contract:

There is not another vendor in the market that can meet the requirements needed for this system. Doing a competitive bid would result in a waste of financial and labor resources to prepare the bid and follow it through the process only to have one respondent that would be considered responsive to the requirements of the system needed.

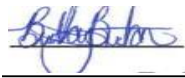
9. What will be the financial or other impact to the CCC if this sole source is not approved and a competitive bid is required?

If this sole source is not approved, it will impact recruitment and enrollment of reverse transfer and visiting students who want to take classes at CCC. CCC has transfer articulation information that is available to show perspective students how their credit will transfer back to the home institution or how their transfer credits will transfer into CCC. Having this database provides quick access to the students who view this information online and eliminates any barriers to receive a delayed response from CCC. Without this tool advisor would have to look up this information per school and/or call the institution for more information. This step is completely eliminated due to this software. In 2019, CCC is the largest

Illinois user of storing articulation data into Transferology and Illinois schools were viewed in 64.7+ million search results nationwide.

Department/College Representative Signature Required

I know and understand the contents of this Sole Source /Bid Waiver Justification and attest that all statements are true and correct.



Department/College Representative Signature

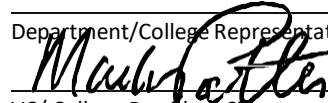
Brittany Burton

Printed Name

4/20/20

Date

Department/College Representative Signature



VC/ College President Signature

Mark Potter

Printed Name

4/21/20

Date

CPO Approval and Signature Required

April 1, 2020

To Whom It May Concern:

Transferology®, the nationwide network from CollegeSource, is a hosted Software-as-a-Service (SaaS) used by more than three hundred and forty campuses of higher education nationwide to publicize transfer credit information, kick off evaluations of unknown equivalencies, and advise students.

While other software packages may offer places to search and/or store equivalencies, publicize transfer information, or even a workflow for handling evaluation decisions, no other software on the market is built around the unique CollegeSource database.

Sole Source

The CollegeSource database is the *first* and only *comprehensive* database of course and catalog information. It houses over 121 million course descriptions, drawn from more than 149,000 current and archived catalogs. This data is collected annually, at the expense of CollegeSource, for every school in the United States recognized by the US Secretary of Education, regardless of whether that school subscribes to a CollegeSource product or not. Annual collection of the data ensures that data is accurate, up-to-date, and allows for sophisticated features, such as comparing any two editions of the same catalog title to highlight specific changes. No other database is comparable in that no other database on the market is comprehensive; most contain less than 10% of the source data that appears in the CollegeSource database. Also, no other database is updated annually; others who claim to hold college course data are typically vague about the date on which the data was collected, and in which catalog it appeared.

Transferology is the only real turn-key solution on the market because of its underpinning database, SaaS platform, and integration with CollegeSource products TES® (Transfer Evaluation System) and uAchieve® Degree Audit. Other products require extensive and time-consuming data entry by the client, often requiring additional technical resources and expertise to implement.

Usage

Students using Transferology leverage the CollegeSource database by being able to add their coursework from institutions nationwide. Subscribing institutions do not need to enter that data manually, a benefit that no other product on the market offers. Additionally, the integration between TES and Transferology allows credit evaluators to make decisions based on real student usage data, thus creating a seamless and holistic transfer solution.

Key Statistics

	Nationwide (All Students)
Transferology Subscribing Member Institutions	350 +
TES Subscribing Institutions	1,250 +
Equivalencies Stored in Transferology	21.7 Million +
Student Searches**	5.9 million +
Student courses added	16.8 million + (from over 5k different schools)
Search results*	278.5 million +

Statistics from February 2020.

Key Features of the Transferology Lab

Students and subscribers each receive a unique user experience. Students use Transferology.com to explore, while staff at the institution utilize TransferologyLab.com.

Transfer Equivalencies

Quickly and easily view a comprehensive list of all the equivalencies a participating school has defined, with the ability to control the transferring to and from fields. Filters allow you to narrow results by location, military, online, and department.

Replacement Courses

Advise students on courses they can take elsewhere that will transfer back to your institution. This reverse lookup makes it simple to see where else a student can take a course to satisfy requirements to complete their degree at your school.

Transfer Pathways

Save time, streamline your advising workflow, and help students map their community college to four-year path using Course Bundles and Transfer Pathways. Create and reference common or unique transfer scenarios for students with Course Bundles. With highly useful, pre-approved avenues to a degree, students can explore Transfer Pathways to take courses that are not only transferable (taking advantage of partnership agreements), but also applicable to a real educational goal.

Reports and Statistics

Measure and manage your transfer-friendliness with our reports and statistics. The Popular Courses and Unknown Equivalencies reports allow you to see what courses students are interested in, so you can proactively make equivalencies and boost your placement (match percentage) in the results list. Other powerful reports allow you to monitor traffic, requests for information, profile views, program views, replacement courses, and results clicks.

Evaluate Faster with TES® Integration

Users designated as TES Evaluators may create evaluation tasks from courses appearing in Transferology's Course Bundles and Unknown Equivalencies, streamlining the transfer process based on actual student interest! Equivalency guides created in TES may also be automatically imported into Transferology for display.

View Programs with uAchieve®

Show students how their courses may apply (what-if scenarios) toward various degree programs they may be considering. This feature is available for schools that have the uAchieve Degree Audit. This way, students can see a complete audit before enrolling.

Webinars

CollegeSource conducts monthly interactive webinars at no cost to users, making training available year-round. Custom webinars are available on request.

Implementation

Transferology is a Software as a Service (SaaS) that requires an annual subscription for institutions and always remains free to use for students. The service is hosted on a cloud-like virtualized server array with fail-over and backup redundancy. User access is available through any Internet browser, utilizing a unique username and password combination for each user. Accounts for new subscribers are created within 24-48 hours, requiring no effort from the institution. Schools are provided with an administrator account, which is then used to generate all other user accounts. New users and their accompanying in-system rights can be established in seconds. Training for administrators (and all other Transferology roles) is free and delivered via interactive webinars.

Imports

Schools that wish to load equivalencies into Transferology from a data source other than TES or uAchieve can arrange for imports. Two imports per year are part of the subscription agreement. Additional imports are available for a fee that covers all the necessary data handling, analysis, and communication required to complete the upload.

Sincerely,

Alanna Fenton-Esquinas
Director of Marketing
CollegeSource

1327 E. Kemper Rd, Suite 3000
Cincinnati, OH 45246
Phone: (513) 834-8780
Fax: (513) 834-8779
www.collegesource.com

Date	Invoice #
04/01/2020	Quote-28600

Bill To:

City Colleges of Chicago District
226 W. Jackson
Chicago, Illinois 60606
United States

Ship To:

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Please make checks payable to: CollegeSource, Inc. 1327 E. Kemper Rd, Suite 3000 Cincinnati, OH 45246 FEIN# 20-1009018	Customer ID	Contact Name	P.O. No	Terms
	0215361	Brittany Burton		Net 30

Qty	Item	Description	Rate	Start Date End Date	Amount
1	58000	Transferology Subscription	\$34,845.00	04/01/2020 - 03/31/2021	\$34,845.00
SUBTOTAL					\$34,845.00
SALES TAX					\$0.00
TOTAL					\$34,845.00
Payments/Credits					\$34,845.00
Balance Due					\$0.00

Cancellation Policy:

Cancel within first 30 days of subscription start date – No Payment Obligations.

Cancel within 31-60 days of subscription start date – 20% Payment Required.

Cancel within 61-90 days of subscription start date – 40% Payment Required.

Cancel within 91 -181 days of subscription start date – 60% Payment Required.

Cancel over 181 days of subscription start date –100% Payment Required.

For questions concerning this document please contact Andrea Wethington at
(513) 834-8776 or by email at andrea@collegesource.com

Thank you for your business!

1327 E. Kemper Rd, Suite 3000
Cincinnati, OH 45246
Phone: (513) 834-8780
Fax: (513) 834-8779
www.collegesource.com

Date	Invoice #
04/01/2021	Quote-00001

Bill To:

City Colleges of Chicago District
 226 W. Jackson
 Chicago, Illinois 60606
 United States

Ship To:

Please make checks payable to: CollegeSource, Inc. 1327 E. Kemper Rd, Suite 3000 Cincinnati, OH 45246 FEIN# 20-1009018	Customer ID	Contact Name	P.O. No	Terms
	0215361	Brittany Burton		Pro-rated

Qty	Item	Description	Rate	Start Date End Date	Amount
1	58000	Transferology Subscription	\$47,853.00	04/01/2021 - 07/31/2022	\$47,853.00
		16 month renewal to align with TES subscription 8/1/2022			
SUBTOTAL					\$47,853.00
SALES TAX					\$0.00
TOTAL					\$47,853.00
Payments/Credits					\$0.00
Balance Due					\$47,853.00

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