November 16, 2011

ADDENDUM #1 to the University of Florida Invitation to Negotiate (ITN)12LD-111 “Shared Services Assessment Consulting” which was scheduled to open on November 17, 2011 at 3:00 PM at the University of Florida, Elmore Hall Conference Room, Radio Road, Gainesville, Florida.

The opening date has changed - ITN12LD-111-Shared Services Assessment Consulting will open December 8, 2011 at 3:00 PM/ET.

This addendum consists of:

- Questions asked at the Non-Mandatory Pre-Proposal meeting held October 31, 2011 at 3:30 PM in Elmore Hall at the University of Florida
- Questions presented in writing after the Non-mandatory pre-proposal and prior to the deadline of November 1, 2011 at 5:00 PM.
- **Modification to Tab 6**

  **Tab 6:** Describe the pricing model for providing the services. Provide more than one proposal for pricing; consider a fixed fee for each step in the process as well as hourly rates for project work. **Include pricing models for implementation costs.** Ensure pricing models include creating offerings, special financial considerations and flexibility of the vendor.

This addendum shall be considered part of the Contract Documents for the above mentioned ITN12LD-111 as though it had been issued at the same time and incorporated integrally therewith. Where provisions of the following supplementary data differ from those of the original document, this addendum shall govern and take precedence. All other terms, conditions, and regulations will apply.

Sincerely,

Lisa S. Deal, C.P.M
Director

Please acknowledge receipt of Addendum #1 by signing below, and returning this addendum with your proposal. Failure to include addendum with your proposal may result in rejection.

______________________________  ______________________________
Signature      Company Name

______________________________  ______________________________
Company Address      City/State/Zip

The Foundation for The Gator Nation
An Equal Opportunity Institution
Summary of Pre-Proposal Meeting held October 31, 2011 at 3:30 PM in Elmore Hall at the University of Florida

UF Staff present:
Matthew Fajack, Vice President and CFO
Michael McKee, Assistant Vice President, University Controller
Jodi Gentry, Director, HR, Organizational Development and Training
Fedro Zazueta, Director, Academic Technology
Lisa Deal, Purchasing Director
Gail Morris, Purchasing, Administrative Assistant

Lisa Deal welcomed those present in person and on the phone. UF representatives were introduced and vendors gave their name and company. Lisa then gave a brief overview of the ITN and reminded vendors questions are to be routed through Purchasing and that her contact information is provided in the ITN document. Vendors were asked to sign in on the attendance sheets or identify themselves on the phone. Vendors were reminded to submit the proposal prior to the opening date, currently November 17, 2011 at 3:00 PM. Proposals must arrive at Elmore Hall – the address shown in the solicitation.

Q. Will the questions asked today and those you receive by the end of the day tomorrow be included in the addendum?
A. Yes. All the questions asked will be included in the addendum. If we need additional time to obtain the answers to the questions then you will be notified when the addendum will be sent to you. The addendum will be posted to the Purchasing website, just as the ITN has been posted.

Q. What is the impetus behind the ITN?
A. To serve our clients better, to be more effective, efficient and to reduce costs.

Q. Was there a reason why there is a separation between the administrative business processes and the IT processes?
A. There are a lot of people out in the departments who do both functions, some IT functions, some business functions and it's hard to separate those fields. We are really trying not to put a box around the services to be considered and determine what services should go to shared service centers or what should stay with a department unit. IT has a clearer vision than the administrative business process because they not only have people but additionally have hardware consolidation.

Q. As a follow-up on that – the scope of services on page 5 for the administrative processes versus the scope of services on page 9 for the IT rationalization, are they similar in scope? What's the difference?
A. They are similar in scope. Both are asking to find the most efficient and effective way to execute the needed services, without putting the solution for either in a box. The solicitation contains the two areas (IT and other administrative business processes) because one company may be very good at the IT aspects another may be very good at the administrative processes or it may be one company that is good at all of them. We have difficulty separating them because we have people who may do IT helpdesk for 20% of their day and process vouchers for 40% of their day and so on.
In the Scope we address a diagnostics section, a process redesign section, a business case section (see page 5, section 1.1.1 through 1.1.3 of the ITN) and that applies to the IT arena as well. Even though the description of the administrative business process and IT areas are provided separately, the solution to approach the assessment shown in the ITN regarding diagnostics, process redesign etc. are the same for both areas.

Q. There was a statement that said Shands, IFAS and the hospitals and clinics were out of scope for the IT rationalization. Does that also hold true for the business process side?
A. Shands and IFAS county extension offices are out of the scope for this solicitation. Because IFAS extension offices are Federal, State and local government and Shands clinics are typically located off campus, they are low on the priority list. They may be considered later but it’s not practical at this time.

Note that the IFAS research and education centers are included in the IT section. (See next question for site locations)

Q. Do any of the IFAS offices exist on campus?
A. There are 13 IFAS research and education centers throughout the state - the furthest south is Homestead and furthest north is Quincy. The locations are located on the IFAS website and there is a map which provides their location. See this site: http://solutionsforyourlife.ifas.ufl.edu/map/index.html#rec_rds

Q. Are you anticipating a full shared services model with a call center and if yes, do you anticipate one call center or do you expect to have 3 (three) call centers, one for HR, one for Business Processes and one for IT?
A. We are trying not to limit the possibilities. We expect the vendor will provide direction in that regard.

Q. Where is the information on the business processes? Is it all over or is there a central location?
A. It is all in Gainesville

Q. Can we have access to the processes, the current documentation?
A. Yes, we will provide whatever documentation we have on the business processes. The MyUFL Toolkits are instruction guides used by end-users/department staff to create transactions. Web simulations, instruction guides are available from this website: http://www.hr.ufl.edu/training/myufl/toolkits/default.asp

Also see Attachment A for documented HR business processes which show specific transaction flow for campus/end-user, computer system and core/support offices. Similar business process maps are not available for financial transactions.

Q. To what extent have you documented the current business processes?
A. We aren’t sure how well documented processes are and they may not be followed by all departments but UF staff can explain current business process during the project.

Q. Is every department doing it differently? Every department would have their own process?
A. In general yes, each department may have their own process. There is an end result that will create a voucher or an HR document for the central office to process but how each unit gets the transaction there varies.
Q. At the highest level do you have a definition for each one of the processes at the beginning and end of the process? How it is today for example how do you define the payroll process or any of the processes? What is the starting process?
   A. See above for reference to current documentation in the MyUFL Toolkits and Attachment A for HR business processes. Beyond that, to the extent available, additional information can be provided by UF staff during the project.

Q. Would you be interested in redesign?
   A. Yes, redesign is included as a deliverable in the solicitation document.

Q. Is there an existing HR enterprise system that could present a problem for integration?
   A. We use PeopleSoft for financials, HR and student financial services.

Q. Do you have a timeline in mind?
   A. Yes, there is an 8 month timeline in the solicitation document. Once we have a negotiated contract then we expect the project assessment scope to be completed in 8 months.

Q. Do you have a time when you think this process will be awarded and completed?
   A. Yes, in the solicitation document we would like to have an award by January and then have the project completed by next August.

Q. How did you arrive at an 8 month determination for the completion of the project?
   A. In our research other universities have completed the process in 8 months or less.

Q. Do you have language considerations for the process, perhaps Spanish or Creole any other language capabilities?
   A. No, our business processes are in English.

Q. Within the scope of services, how many third party providers are there today? Any?
   A. No.

Q. Are there any IT 3rd party providers?
   A. Yes, we use 3rd party IT services particularly for academic related things such as “Turn-it-in”, “Linda.com”, a variety of services of that type.

Q. The initiative that is being undertaken, would there be any 3rd party contracts that would be affected?
   A. There are no third party contracts that would be barriers to this project.

Q. Who's the audience for the business case?
   A. The audience would be the committee members, the president, the provost and depending on the recommendation, campus.

Q. Is the project team itself dedicated to the project? Has it been determined who or how many will be dedicated to this project?
   A. This is a joint project between UF and the consultant. All the colleges will be participating if the assessment can show savings. The GBAS (Gator Business Administrator Services) staff will support the consultants’ efforts as well as a considerable amount of time from
both the CFO and the University Controller. This project is their number one project for the next two years. We expect to provide support beyond this level, but we are uncertain of the support necessary. During the negotiation phase the university and the consultant will discuss the cost and quality trade-offs of providing larger number of UF employees to support the project.

Q. How many FTE related to the project?
This is a joint project between UF and the consultant. We understand that in order to execute the assessment you will at a minimum need introduction to the campus. There will be IT staff and GBAS staff that will assist with the campus introductions. We expect to provide support beyond this level, but we are uncertain of the support necessary. During the negotiation phase the university and the consultant will discuss the cost and quality trade-offs of providing larger number of UF employees to support the project.

Q. Is there a dedicated Project Manager to oversee the project?
A. No. In the solicitation document we are looking for someone to project manage the assessment portion.

Q. Are there going to be some dedicated FTE's to this, dedicated staff?
A. There will be 2 or 3 people from the Controller’s office (Mike McKee’s) – from GBAS who will assist with the project. These are people who have worked in departments and they are there to help the departments. The staff will not be available full time; time will need to be requested in advance. They will function as a resource to explain business process and to serve as a liaison between the consultant and the department(s). We expect to provide support beyond this level, but we are uncertain of the support necessary. During the negotiation phase the university and the consultant will discuss the cost and quality trade-offs of providing larger number of UF employees to support the project.

Q. What about the project manager from the university side? Would they be a dedicated project manager?
A. In the ITN document itself we outline the role of the project manager. We are looking for someone to oversee the assessment process. No matter how many vendors we contract with we are not going to manage the assessment. There is a project management component of the award.

Q. Are all 16 colleges on board with this assessment project?
A. Yes, with varying degrees. The deans are all facing budget cuts and they are on board, if it saves them money and shared service can do the service just as well. The President indicated in a speech this spring that this would be one of the ways we will save money. The Provost is very much behind it. That is not to say we are going to do this. If the study doesn’t show that we can save significant money and provide as good if not better services to the colleges and other units. Then we won’t go forward.

Q. How has this been communicated to campus?
A. The President has indicated in his speeches in a general way to the Board of Trustees, to the Faculty Senate, and to the colleges and deans that shared service centers are a consideration with the budget cuts, and could be a cost reduction solution for campus. Matt Fajack has addressed it with the Deans on more than one occasion. Mike McKee, the University Controller has presented this idea to the business offices at college and unit level. There have been conversations about shared services but you will find some have “never” heard of the idea.

Q. Have there been any recent IT assessments done?
A. Yes, a couple of years ago UF completed an Information Technology action plan which was essentially a strategic plan with short term goals, that included hiring a Chief Information Officer (CIO) to put a face on the structure and reorganize into 6 IT units. There are units that are decentralized. The reports are available on the IT website, www.it.ufl.edu which provides a strategic and action plan outlines that very clearly provide the direction IT is moving towards.

Q. In the scope on pages 7 through 9 of the ITN, it refers to an IT rationalization. Does that build upon that strategic plan? Are you looking at everything or just the decentralized units?
   A. The strategic plan refers to everything. As Matt Fajack stated, UF is trying to improve the quality of our service and reduce costs. Again, the strategic and action plans will outline the IT direction.

Q. Regarding the PMO, have you given much thought to what the project governance is going to be on the UF side or are you expecting the vendor to propose what the appropriate governance structure should be? For example, who will be the steering committee members and who will the vendor work with or is that part of the proposal?
   A. Please recommend in your proposal response the structure beyond the currently established Executive Committee for this solicitation, made up of UF’s CFO, CIO, VP of HR and the Provost.

Q. Are there any particular areas that are pain points or areas of priority that you can talk about?
   A. Research administration, in particular the Pre and Post Award are critical, that’s an area we haven’t put a lot of thought into how we might build something like that, so that might be pretty straightforward.

Q. Do you have an estimate of your customer base? Numbers for areas for example, HR, how many employees?
   A. No, for most of our business processes across campus we don’t know how many FTEs are doing each specific task.

Q. Not how many are doing the task, how many are customers.
   A. A range between 22,000 – 26,000 people get UF paychecks every pay period. Of those approximately 25% are faculty, 40% are staff and 35% are students. A pain point for this project is that our classification system is an unreliable way to determine our customers. If you are looking for a job title that somehow is an indicator we can give you a range of titles but within a college or department, depending on financial needs. There isn’t consistency across titles and units with position responsibilities, things have evolved organically. In some cases there will be someone in a professional level role fulfilling these functions in a smaller college you may have an hourly employee with a broader range.

Q. How many key stakeholders will we need to talk to, 10, 500 or 2500?
   A. We expect the consultants to spend time in the departments determining who’s doing what and current state. We’d like the consultants to provide a methodology for knowing which, and how many units to interview. UF consists of 16 colleges, 600+ departments, 13 research centers and we have 8 to 20 administrative offices, depending on how you categorize them.

Q. Regarding HR outside of PeopleSoft do you use Peoplefirst, or any of the DMS applications?
A. Other than as individual employees accessing their benefits through Peoplefirst, it primarily accessed only by HR/core office.

Q. Are administrative units and departments all over this campus?
   A. Yes.

Q. The assessment results, will there be a necessary for a minimum number of stakeholders to “buy-in” for the project to go forward? If the answer is yes, who are the key stakeholders?
   A. The buy-in required for a shared services implementation requires a broader acceptance than just the UF executive committee shown above. The assessment report will come to the executive committee and if they believe the financial benefits and the efficiencies and better service are going to make a difference to campus then we will go forward to make that buy-in happen. In addition to the executive committee, the Deans and a major number of chairs would need to be on board.

   Once the consultant has completed the assessment and have interviewed campus, the consultant’s assessment will need to show it is credible and has integrity. UF will handle the campus communication, consultants are being asked to identify if there is a business case. Consultants may help present the report to key leaders on campus once the executive committee has seen the report and the business case/strategy is clear.

Q. If UF would require some assistance to implement these recommendations are there any restrictions going to be placed on the firm that made the recommendations to respond to a potential RFP to help implement.
   A. We will negotiate implementation fees as part of this award.

Q. What level of process redesign are you asking for in this assessment? Are you looking for what areas need redesign and not the actual redesign at this time?
   A. Process redesign needs to be performed to the level necessary to support the business case to support cost savings and service levels.

Q. Does UF currently have an IT helpdesk and who does it serve? Does it serve staff and students?
   A. Yes, there is a UF Helpdesk that addresses any IT related issues. Some units have their own helpdesk for specific types of applications for example, IFAS might have helpdesk support that is be related to something in the research stations throughout the state. There are 29 other units all the units are tied together, we all use the same reporting system, we all talk to each other, and we all help each other. Not all 29 report to the CIO, only the UF HelpDesk the other help desks report to their deans.

Q. Are they all integrated with the workflow Remedy?
   A. Yes, all use Remedy

Q. Do they support students as well?
   A. The Helpdesk supports anyone who is a member of the University of Florida community, distance education students, resident students, faculty, etc.

Q. Regarding employee services is there much distinction in the services provided to faculty and those provided to staff?
A. There are some differences. We have a service called learning support services that is particularly dedicated to faculty, very rapid response, a very specialized group that handles course management issues, etc. This is atypical, for the most part the helpdesk functions as the first tier and then when an issue isn’t resolved at that level it might be sent to the appropriate person to resolve the problem.

Some Core office functions in HR are faculty-specific and are not handled by departments.

Q. Does UF use myflorida marketplace?
UF does not use MyFlorida marketplace. UF has an electronic requisitioning system (SciQuest, branded myUF Market). In the future the Controller’s Office and Disbursements will be working on automating the invoice payment process.

Q. Does UF participate in the EduCause survey?
Yes

Q. Are you open to co-located staff in a virtual shared service center or outsourced solutions?
Yes, we’re open to all alternatives. However, we do live in a community and we are very cognizant of our town and gown relationship so there are areas (like our custodial staff) that we will not outsource.

Q. Is everyone on PeopleSoft or do you have some departments that are running their own?
A. All units must use PeopleSoft as it is the system of record for UF financials and HR. That being said, some units run shadow systems. There are some IT discrepancies because, for example, the Veterinary College has needs that the language arts department does not. There are some specific systems that won’t be found except in the college that needs it. Problems develop when those systems start to run into the enterprise system and that’s where we develop IT inefficiencies. This is a large campus with varied needs and we need to meet those needs.

Q. Is there a list of all the major enterprise systems that you use in various areas?
A. Yes. We use the full suite of PeopleSoft. Including the following:

Financials (FI) and HR
- FI - PeopleSoft, 9.1
- HR – PeopleSoft upgrading from 8.8 to 9.1
- SA – PeopleSoft Campus Solutions 9.0
- PA – PeopleSoft Enterprise Portal 9.0

Bolt-on’s to PeopleSoft:
- HR – Gator Jobs: PeopleAdmin
- HR – ePaf
- HR – eVerify
- HR (some FI) – Cedar Crestone – Effort Reporting
- FI – SciQuest – requisitions/shopping
- FI – Budget Prep – homegrown
- PA – Access Request System – homegrown security roles requested/granted
- PA – GLAM (Gatorlink Account Management) – homegrown
- FI – Hyperion - currently Core Office only but could roll out campus-wide
Student Records and Admissions Systems are all Homegrown Legacy applications running on the mainframe

Q. Does UF use a separate system for time and attendance?
   A. No. Some units may use other systems but all time gets into is entered into PeopleSoft

Q. If a bidder wants to negotiate any of the standard terms and conditions in the proposal how would that be accomplished?
   A. Normally specific terms and conditions aren’t negotiated until the negotiation stage. If your company has strong reservations/concerns, note it in the response. As a State of Florida public agency, UF cannot indemnify vendors.

Q. Beyond cost reduction and efficiency goals are there customer service or employee service issues?
   A. Yes, there is an expectation to improve the customer service to our employees. Many departments have created shadow systems trying to duplicate the information they received before the PeopleSoft system. There are some department that still are not happy with the type of reports than can access from the system.

Q. Can you explain how a multiple award will work?
   A. Yes, the current structure in the ITN shows three opportunities for award: IT, other business processes and project management. One firm might get all three; there could be three awards each to a different vendor. Until the responses are read and evaluated based on the evaluation criteria we won’t know how many awards there will be.

Q. Are you looking at consolidating all 29 units of IT or are they already centralized and standardized from a processing perspective?
   A. We are interested in consolidating where we can. We have more than one network and there are many areas we provide support to including, teaching and learning, research, administration, security, and web based services, those are general areas within IT that reach across the university. In some cases we are providing highly centralized services.

Q. Regarding the process in Florida – how will the ITN flow from the beginning to end of the process?
   A. The beginning of the process is the issue of the solicitation by this session of Pre-proposal questions and answers. Any other questions that arise to be submitted in writing by email or faxed to Lisa Deal by close of business on Tuesday, November 1st. We will generate an addendum based on this meeting and any follow-up questions that will be emailed and posted on the Purchasing website.

The proposal MUST be at Elmore Hall on November 17th before 3:00 PM – or whatever the opening date/time is. Opening proposals is a public event. The content of the proposals does not become public until after the award. Once opened the proposals are read by the committee. The committee meets to decide which companies they wish to begin negotiations with. Those meetings are recorded and that information does not become public until after the award is made. The committee may decide to begin negotiations with all who submitted a proposal or they may reduce that number based on the initial submission. We would then invite vendors to negotiate. Vendors not invited in will be notified that the committee has begun negotiations with other vendors and if terms cannot be met then the committee may revisit their proposal and invite them to negotiate later.
Negotiations don’t need to take place in person; they can take place over the phone. In your solicitation document you are required to provide the names of the authorized negotiators for your company. We have had situations in the past when we’ve negotiated and then a CFO of a company will not agree to the terms negotiated. Normally UF negotiates until we reach contract. Then the intended award is posted. The public posting process takes 72 hours and if there are no protests during that time the solicitation is awarded and closed. ITN’s are relatively unique to Florida although the process is similar to RFP’s in other states.

**Q. When is your expected award date?**
A. The current time line is a potential award in December or January. It may be sooner.

**Q. Regarding Enterprise Systems, is there a website where I can look up the all the major systems on campus?**
A. See the previous question regarding major enterprise systems.

**Q. Can you provide Org charts for those units we will need to talk with?**
A. Yes, but not all Org charts are current / accurate. See: [http://www.ir.ufl.edu/orgchart.htm](http://www.ir.ufl.edu/orgchart.htm) and [http://fa.ufl.edu/uco/orgchart.asp](http://fa.ufl.edu/uco/orgchart.asp) and [http://www.it.ufl.edu/ciooffice/](http://www.it.ufl.edu/ciooffice/)
Questions submitted after the pre-proposal meeting and prior to 11/1 5PM deadline

Similar questions have been grouped together under headings

In some instances questions have been grouped and one answer provided for those questions.

University Staffing/Resources

Q. Does the University envision that the Project Management Office ("PMO") for the Assessment Phase will be staffed with University employees or staffed solely with the consulting firm’s employees? Also, what resources and roles have been identified from the University to serve on this project?

The vendor will staff the PMO. UF staff from Gator Business Administrator Services (GBAS), a unit in the Controller’s Office and IT will be available to assist the assessment team. We expect to provide support beyond this level, but we are uncertain of the support necessary. During the negotiation phase the university and the consultant will discuss the cost and quality trade-offs of providing larger number of UF employees to support the project.

Q. The ITN (Page 5) states that the “Office of Information Technology will assist with the IT Assessment”. What role does the University see the Office of Information Technology playing and what level of resources (# and time) will be dedicated to the effort?

At a minimum UF staff will assist with the assessment by providing an outline of current UF business practice and introductions to department/units but will not be dedicated full time to the project. We expect to provide support beyond this level, but we are uncertain of the support necessary. During the negotiation phase the university and the consultant will discuss the cost and quality trade-offs of providing larger number of UF employees to support the project.

Q. Will the university assign a university resource as a single point of contact and project manager for this effort to coordinate availability, meetings, deliverable reviews, etc., with university stakeholders?

Q. What UF staff will be dedicated to establishing the rapport with the campus, making introductions happen, and helping the consultants through roadblocks in the process? Will the UF team be assigned full time?

Q. In addition to the functional liaisons, will UF provide a 100% dedicated administrative person to help with the university administrative matters (meetings, room scheduling, needs, etc.)?

An awarded vendor will serve in the PMO role coordinating UF staff availability to respond to consultant questions regarding business process, introductions to campus units and ensuring that the project meets required timelines. No UF staff are assigned full time to this project. The consultant will have support from the Controllers Office, IT and the CFO. The PMO role will report to the CFO. The CFO will be available at all times as the single point of contact for contact and coordination.

Shared Services Project Governance Structure
Q. Please confirm the project organization from University of Florida, including project steering committee, project sponsor, as well as the project resources by function?

UF has currently established an executive committee for this project. The committee consists of UF’s CFO, CIO, VP of HR and the Provost. Please recommend in your proposal response the structure beyond the currently established Executive Committee.

Business Process

Q. The ITN (Page 5) identifies the 7 technology and administrative functions to be evaluated. Is there a listing of sub-processes that need to be addressed or should we identify the sub-areas that we would include?

Vendors should identify the sub-areas to be included.

Q. There is reference to an initial business case. Can UF send us a copy of the business case?

The business case referred to is IT-specific and is available from this website:
www.it.ufl.edu
http://www.it.ufl.edu/ciooffice/strategicplans.html

Sourcing

Q. For the IT Assessment, the University mentions sourcing. How is the University defining sourcing related to IT?

Q. Please clarify that it is the sourcing process, but not the category analysis / sourcing strategy that is in scope for the non-IT scope.

Q. Procurement is mentioned as one of the functions in scope. Is this intended to cover the potential efficiency gains only in procurement organization or will procurement spend be part of the scope as well?

The sourcing process for the IT and administrative processes section means how the product needed for the unit at a specific point in time is sourced/selected. The process to place an order but not the process or strategy of how central purchasing procures the item(s). The scope of this project does not include creating a sourcing analyses/strategy for all UF purchases whether administrative or IT related. Strategic sourcing decisions will be retained in UF’s central purchasing unit – done in conjunction with key stakeholders.

Assessment results

Q. How much emphasis does the University want on benchmarking administrative functions (e.g. metrics, processes) as a part of the assessment?

The assessment results must be credible. The university expects that benchmarks will be a key component of the business case for or against a shared service recommendation. The vendor should recommend how much data is required to develop a comprehensive assessment. UF will strive to provide needed data to assist.
Q. The University seeks a cost-benefit analysis and business case for the shared services model. Will the University be providing the selected vendor with the baseline data or will the collection of such information be the responsibility of the vendor. If the latter, how readily available is such information and, if not, does the University intend to help the vendor in collecting it?

There is no baseline data. The vendor will need to identify the methodology for calculating costs and UF will provide whatever data are available.

Q. UF mentioned cost, technology and process current state assessment. Do you expect the consultant to capture current 'service levels' while we are interviewing the stakeholders and staff?

Yes

Q. Is UF open to a shared service environment that supports and encourages user "self-service" where possible?

UF is open to all suggestions that improve service, efficiency and reduce cost. Efficiency needs to take into account appropriate use of time for administrative tasks based on pay level and best use of resources when proposing a model for shared services.

Software

Q. Can UF send the IT inventory of sources (software products, etc.)? In other words, the main systems and sub-systems on campus.

Q. What are the core software applications currently deployed at the University?

Financials (FI) and HR
   FI - PeopleSoft, 9.1
   HR – PeopleSoft upgrading from 8.8 to 9.1
SA – PeopleSoft Campus Solutions 9.0
PA – PeopleSoft Enterprise Portal 9.0

Bolt-on’s to PeopleSoft:
   HR – Gator Jobs: PeopleAdmin
   HR – ePaf
   HR – eVerify
   HR (some FI) – Cedar Crestone – Effort Reporting
   FI – SciQuest – requisitions/shopping
   FI – Budget Prep – homegrown
   PA – Access Request System – homegrown security roles requested/granted
   PA – GLAM (Gatorlink Account Management) – homegrown
   FI – Hyperion - currently Core Office only but could roll out campus-wide

Student Records and Admissions Systems are all Homegrown Legacy applications running on the mainframe

Q. Do any of the individual colleges have home-grown or ancillary systems or processes at the college, departmental or business office level that are utilized to create input files to main
University systems? If so, would the University be in a position to identify them and how well they are documented (e.g. flow charts, etc.)?

Yes, some units do use other systems to create input files into PeopleSoft. Some processes are identified in flow charts, as seen in Attachment A, Time and Labor, others will have to be identified through discussions with departments and core/support office units.

Financials

Q. Is the University able to take advantage of prompt payment terms (e.g., 2% 10 net 30)?

Yes

Q. What is the budget model used at UF (e.g. RCM)? How are revenues and costs allocated between the center and the various colleges and operating units?

UF uses an RCM budget model. Additional information regarding RCM is available from the CFO’s website where presentations on RCM are available: http://cfo.ufl.edu/present.asp

Pricing Proposal

Q. Please clarify what is meant by “consider a fixed fee for each step of the process”.

Consider providing a fixed fee structure where costs include travel and are a fixed amount for each step of the diagnostic, design and/or project management pieces of the solicitation.

Q. Tab 6 asks us to describe the pricing model for providing the services and then provide more than one proposal for pricing. Will you consider pricing models apart from a fixed fee for each step in the process and/or hourly rates for project work? Also, what criteria will you be using to evaluate the pricing proposals, particularly since you’ll be seeing multiple options from each firm?

UF will consider any and all pricing models. Once proposals have been read and negotiations commence, negotiations will determine which pricing model is best suited for UF for this project.

Proposal Response

Q. We understand from section 4.1.1 that the original response must contain the original manual signature of the authorized person signing the proposal. For the signatures of the other person(s) authorized to negotiate section 7.1, may these signatures be included as printed e-signatures (i.e. not in hand-written ink)?

Yes.

Q. May we add additional Persons authorized to negotiate in section 7.1 by adding additional lines to the certification form?

Yes

Q. Please clarify if we may authorize additional people for negotiation after 11/17/11 but before negotiations commence?
Yes.

Q. Considering the large scope of this effort, would the University consider extending the proposal submission deadline – currently November 17, 2011?

   Yes, see the addendum or the new opening date and time.  
   Website http://www.purchasing.ufl.edu/vendors/schedule.asp

Evaluation Criteria

Q. In the bidders’ conference, the University identifies some core competencies (e.g., change management) it expects the winning bidder to bring to the engagement. Does the University anticipate leveraging those competencies during the conduct of the assessment or for a subsequent implementation phase of work? What additional competencies does the University seek in its selected vendor?

   UF will manage the change management process should the assessment provide a strong business case for improved efficiency, service and cost reduction. The assessing consultant may assist presenting the data to key stakeholders on campus but the change management process will be led by UF should implementation occur.

   UF is looking for vendors who best illustrate the ability to meet the needs of the assessment based on the Evaluation Criteria identified on page 9 of the ITN document.

Award

Q. Due to the possibility of multiple awards and in light of the breadth of services and functions to be assessed, do vendors have the option of bidding on only a portion of the functional scope of the NTI, i.e., on specific functional areas such as the IT shared services area or other specific business areas like Research Administration or Human Resources? Or will vendors only be considered if they bid on the entire scope of the solicitation?

   Vendors are not required to propose for the entire scope of the solicitation.

Pre-Proposal Conference

Q. Can University of Florida share the audio of the in person bidders meeting held on October 31, 2011?

   Questions and responses from the pre-proposal meeting are available as part of Addendum 1.