

**Office of the Vice President  
and Chief Financial Officer**

*Procurement Services*

<https://procurement.ufl.edu/>

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October 29, 2019

**ADDENDUM #1** to the University of Florida ITN20LD-122 Business Process/Continuous Improvement Consultant(s) previously scheduled to be opened on November 14, 2019 at 3pm at the University of Florida, Elmore Hall Conference Room, Radio Road, Gainesville, Florida.

This addendum shall be considered part of the Contract Documents for the above mentioned **ITN20LD-122** 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.

**This addendum consists of:**

- Revised Section 3.0, Schedule of Events;

**ITN Closing (Opening of Proposals) will now take place on 11/14/2019 at 2:30 PM**

- Answers to questions asked prior to the deadline of 5pm, 10/17/2019.

Sincerely,



Lisa Deal

Asst. Vice President & Chief Procurement Officer

**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

Responses to questions submitted for ITN20LD-122 Business Process/Continuous Improvement Consultant(s)

Q1. What is the timeline for this contract start date?

A1. Quarter 1, CY2020.

Q2. Can you please share the addendum for this proposal? When will the questions be available?

A2. As noted in the Schedule of Events in the solicitation document, answers will be posted on or before 10/31/19.

Q3. Why is there no pre-proposal conference? This would be beneficial to responders.

A3. In UF Procurement's previous experience, suppliers are not as forthcoming with questions during pre-proposal meetings, particularly during web-X/remote pre-proposal meetings. Procurement prefers not to require that suppliers travel to Gainesville to participate in a pre-proposal conference. Written questions are welcome. If a conversation is needed, feel free to contact UF Procurement.

Q4. What is the overall budget for this contract? What is your annual budget for this consultative effort?

A4. Currently no budget has been set for the contract or consulting effort.

Q5. How many hours do you anticipate will be needed for the facilitators once the training is completed? What is the timeframe that you need this to be available?

A5. After classroom training is complete and the facilitators are conducting process improvement sessions for the selected project, it is anticipated that a 2-hour bi-weekly meeting will be coordinated by the CI office. This meeting will provide time for the consultant to provide guidance on current projects. Additional phone calls/email correspondence from various trainees/facilitators should be minimal. It is anticipated that this level of guidance will continue for 6-12 months.

Q6. Is the Train-the-Facilitator timeframe of 20 day expectation for all the days to be onsite training days or is the total number of days proposed for executing the onsite training, coaching students and documenting the experience for the leadership? Can training be conducted onsite and coaching be held via virtual meetings as part of the 20 days?

A6. UF is open to the consultant proposing a timeframe and schedule/format that works with the curriculum proposed based on their experience. UF's original thought was 20 days face-to-face for training facilitators and coaching through early stages of projects. Additional help with projects and coaching could be facilitated by bi-monthly calls coordinated through the CI office. Other proposals will be considered.

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Q7. Is the Train-the-Trainer staff experience allowed to be scheduled adjacent to the Train-the-Facilitator experience to reduce travel cost?

A7. Yes.

Q8. CMA has an online platform for these programs. Will any of the program content be allowed to be online?

A8. UF prefers to have in-person hands-on training as the primary method of training for the facilitators.

Q9. How are you planning to handle absentees? While we do not encourage missed classes, we allow our candidates to make up the class missed by going online. Will this be allowed?

A9. How absences are handled depends on what portion of the training is missed. This can be discussed further with the awarded consultant/vendor.

Q10. Is it acceptable for the work on developing the "Introduction to Continuous Improvement" course as a customized resource for the University of Florida be conducted via virtual meetings?

A10. Yes, for development, however, UF would like the consultant to train the staff to conduct a successful training which will require mentoring/coaching those staff in-person and providing feedback after conducting sessions.

Q11. What is the intended outcome regarding belt level training for the train the trainer? Are you expecting certifications?

A11. No.

Q12. Are you intending to retain ownership of the content? If so, there is a licensing requirement associated with our curriculums?

A12. Yes, UF intends to retain ownership of the content. There is no licensing requirement. This training is for internal, administrative use.

Q13. Do you want the curriculum to be for Kaizens or traditional belt certification? This is not clear in the solicitation document. Does UF desire any belt (e.g., green or black belt) certification as part of the vision for continuous improvement certification?

A13. No belt certification is envisioned. UF is seeking custom content that is applicable to a higher education environment and the UF community. The certificate is for administrative use

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only within UF – see the ITN solicitation document Section 1.2, b for a link to a specific example of a UF/HR certificate programs.

Q14. The intended training for the masses is described more like Kaizen training to expose audiences internally to pertinent tools that can be used in solving workplace issues. Is that your intent?

A14. Yes.

Q15. For the coaching phases, how many hours do you anticipate?

A15. UF anticipates 2-4 hours of coaching for the Assistant Director. This does not include the bi-weekly calls with the cohort of facilitators who are going through the program.

Q16. Do you currently have a culture of Lean process and performance improvement? If not, why?

A16. No. This is a new concept to UF and we are looking to integrate the tools and methodologies at this time. There may be pockets of knowledge within various departments or units, but there is not a campus-wide standard or common language at this time.

Q17. Are you looking to train internally, if so, that would require you to purchase a license to use which provides permissions to use our content outside our CMA facilitation?

A17. Yes, UF is looking to train internally. Any license purchase should be detailed in tab 7 of the response document.

Q18. Is there an incumbent or a current contractor that you have been working with and has provided similar Lean services to you? If so, who is it and will they be allowed to bid on this work effort?

A18. Drew Locher, of Change Management Associates (CMA) and Transforming Solutions Inc. (TSI) provided consultative services to UF during the 2018/19 calendar year. Yes, both CMA and TSI may respond to this solicitation.

Q19. Will preference be given to previous lean six sigma vendors at UF?

A19. No. Please see evaluation criteria.

Q20. What software tools do you currently possess and/or use to address Lean / Business Process / Continuous Improvement project efforts? And to track Lean project implementation and/or the cumulative gains from the improvement projects?

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A20. Currently there is no continuous improvement-specific software used by the CI office or facilitators. The CI cohort uses standard software available on campus. Examples include: Excel, Word, PPT, Visio

Q21. Paragraph 1.2 Lot 2 mentions “development of class content for a specific course.” Please provide more details, to wit:

a. What specific course are you planning?

A21a. UF is open to supplier suggestions for courses which may be useful for a general audience. Suggested topics may be specific business process improvement or management methodologies such as: six sigma/DMAIC, agile, design thinking and others.

b. Who is the target audience for this course?

A21b. Target audience is the administrative professional interested in advancing their career by taking on impactful projects on campus.

c. Is this a credit course towards a degree?

A21c. The credit would be towards a certificate granted to the employee by UF’s HR department, not degree credit. See the ITN solicitation document Section 1.2, b for reference to other UF/HR certificate programs

d. Is this a course for internal use only?

A21d. Yes

e. What is your expectation for those who have been through this course?

A21e. The expectation is that the individuals will become a valuable resource to their department and UF, and will continue to engage on future projects.

Q22. Who will be participating in the BP/CI events: faculty, administration, others?

A22. All levels and positions within the organization will be welcome and encouraged to participate in events.

Q23. Please identify the three value stream mapping and four rapid improvement events that are mentioned in paragraph 1.1 and discuss the results of these events.

A23. Value Stream Mapping events: auxiliary billing, hiring foreign nationals, processing emergency payroll checks.

Kaizen events: Expanding UF Alert, FMLA process, Fund 143, Direct deposit of emergency payroll checks.

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For more information on the projects to-date, please see <https://cfo.ufl.edu/news/ufs-collaboration-for-continuous-improvement-cci-transforming-the-way-we-work-together/>

Q24. Is there already an established backlog of continuous improvement (CI) projects related to Lot 2? If yes, is UF willing to share the areas/themes of these changes?

A24. There is not an established backlog of projects at this time.

Q25. What are your plans going forward for the Office of Continuous Improvement, specifically objectives, goals, staffing, events?

A25. The office of CI Mission will mature over time. Currently, the overall goal is to serve as a resource to campus to assist with improving business processes in order to be better stewards of our resources. The goal will be to engage in enterprise-wide improvement efforts in the future.

Q26. What training has management gone through to prepare them in their role of establishing a continuous improvement culture? If none, what is your plan for management training and involvement?

A26. UF Management is very diverse. Some portions of UF's leadership team have been exposed to various trainings over time. However, at the current time, the UF Cabinet has not received explicit training to their role in fostering a CI culture. This initiative is sponsored by four Vice President's at UF and they are interested in fostering a CI culture.

Q27. Do you currently have a Lean coordinator in the Office of Continuous Improvement who is responsible for prioritizing, organizing and tracking improvement activities?

A27. Yes. The office is staffed by 1 FTE (Assistant Director for Continuous Improvement).

Q28. Are there already some Lean trained facilitators and/or practitioners on staff at the University? If so, please explain their role as it relates to this procurement and subsequent consulting efforts.

A28. Yes. There are 6 trained facilitators that we hope to continue to have engaged in the ongoing efforts to strengthen our CI proficiencies. That same group of individuals are serving as the selection committee for this specific ITN.

Q29. Should the 2-3 case studies be related to any specific functional or topical area? If so, what?

A29. It is the vendors choice what case studies it would like to highlight to showcase their qualifications.

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Q30. In Section 4.1.1, Tab 7 a reference is made to Section 2.9.8 as a resource to present the pricing structure. I have not been able to locate 2.9.8 in the document. Can you clarify where this information is located and provide the preferred format for the pricing structure?

A30. Please use the description provided in the Tab 7 reference as how to provide pricing. "Pricing should include hourly rates by position title and an estimate of total hours needed for both a and b and Lot 1. If the hourly rate does not include travel, include a flat rate per project for travel costs, or note that the consultant is prepared to travel in accordance with Florida Statute 112.061 and be reimbursed at cost (with no markup)."

Q31. Are travel cost to be presented broken-out per visit or may they be presented as an annual cost for the contract?

A31. Please see Section 4.1.1, Tab 7 Pricing should include hourly rates by position title and an estimate of total hours needed for both a and b and Lot 1. If the hourly rate does not include travel, include a flat rate per project for travel costs, or note that the consultant is prepared to travel in accordance with Florida Statute 112.061 and be reimbursed at cost (with no markup).

Q32. Will members of the UF CI team be assigned to work with/learn from the Consultants in Lot 2?

A32. Yes.

Q33. CI started as a Lean Initiative at UF, is the University open to other Process Management techniques/methodologies?

A33. Yes. However, UF would like to move towards establishing a common and standard "UF model" that utilizes many tools, perhaps Lean, Six Sigma, Design thinking and/or others, but the terminology is approachable and useable across campus. We do not want one unit doing Lean, one unit doing SixSigma and another doing Agile. We want a common methodology with adaptations as necessary.

Q34. Does the University have a limit on how many firms it will award a contract to for Lot 2 services? If yes, what is the University's cap in terms of the number of firms?

A34. There is no cap on the number of firms that will be awarded.

Q35. When the University has a project need under Lot 2, will it contact all of the Lot 2 firms on this contract and provide them with an opportunity to submit a proposal? If no, what selection process will the University use when project needs arise?

A35. When opportunities arise, UF will contact all awarded consultants with expertise relevant to the specific projects, if that includes all consultants, then all awarded consultants will be contacted.

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Q36. We have reviewed the terms and conditions in the ITN and would like to propose two modifications; however, we are unsure if bidders are allowed to submit exceptions to the terms and conditions. Section 6.0 of the ITN (Agreement Terms and Conditions) states "The following are the Terms and Conditions that will become part of any Agreement consummated between the University and the Successful Vendor and are not subject to negotiation or alteration by the Successful Vendor." However, in Section 4.1.1 of the ITN (Response Format), Tab 8 instructs bidders to "Make specific requests for modification to any terms and conditions. For requested modifications, provide requested language." Will the University clarify if the terms and conditions included under Section 6.0 of the ITN are in fact non-negotiable? Are bidders prohibited from taking exceptions to the terms and conditions in Section 6.0?

A36. The terms and conditions are negotiable. See Section 4.1.1, Tab 8 – provide specific language regarding requested modifications to the terms and conditions.

Q37. Regarding Section 6.8 of the ITN, Sub-section B: Is this applicable to this ITN? Since this is a convenience contract and services will be requested as needed (we are bidding on Lot 2), we don't know if we can expect to receive \$10,000 during the first 12 months of the agreement. Please clarify if a certificate of non-segregated facilities needs to be completed and submitted with our proposal. If yes, can the University provide the certificate or direct us to where we can find it online? We do not see it included in the ITN.

A37. The Certificate can be addressed after award.

Q38. Should the 8 additional copies be hard paper copies or PC compatible media? Are we required to submit an original hard copy, 8 copies of printed hard copies, an original flash drive, and 8 copies of the flash drive? The document was unclear on whether 8 copies of both versions are required. Can the University please confirm that they would like one original and 8 hard copies individually bound, and one original electronic copy?

A38. 1 electronic copy  
1 original hard copy (including original signatures)  
8 additional hard copies

Q39. Section 4.1.2 says one original copy should be PC compatible media, but 4.1.1 asks for a manual signature on the original copy. Will an electronic signature/scanned signature suffice?

A39. A scanned signature is acceptable on the electronic copy.

Q40. Can the University please confirm that the electronic copy of the proposal can be submitted in .pdf format?

A40. A pdf electronic version is acceptable.



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Q41. Section 4.1.4, Marking of Envelopes. Please confirm that the opening date and time used in the outer carton should be 11/14/2019 at 3:00pm?

A41. The outside of the envelope should reflect the newly revised opening date and time as well as the ITN number, 11/14/19, 2:30pm.