



ADDENDUM 1

IMPORTANT DOCUMENT – INVITATION TO NEGOTIATE ADDENDUM

ITN NUMBER: 1627 CCSA

OPENING DATE & TIME: JUNE 9, 2017 at 2:00pm

ITN TITLE: Consulting Services for the Florida Consortium of Metropolitan Research Universities

ADDENDUM NUMBER: 1

ADDENDUM DATE: 5/25/2017

THE PURPOSE OF THIS ADDENDUM IS TO:

- ANSWER QUESTIONS THAT WERE SUBMITTED BY PERSPECTIVE PROPOSERS
- PLEASE SUBMIT BASE CONTRACT PROPOSAL AND OPTIONAL CONTRACT PROPOSAL AS SEPARATE ATTACHMENTS IN YOUR SUBMISSION
- REVISION TO ITN, SECTION 3.2, LETTER D. OVERALL PRICING
 - 1. The proposal submitted in response to this ITN should enumerate a fixed fee for Phase I and Phase II.
 - 3. The proposal must list any other categories of ancillary expenses that may be billed.
- INFORMATION ADDED TO THE PROCUREMENT SERVICES WEBSTE:
 - Florida Consortium of Metropolitan Research Universities organizational chart
 - Florida Consortium of Metropolitan Research Universities 2016/2017 Annual Report
 - <https://procurement.ucf.edu/solicitations/>

PLEASE ACKNOWLEDGE RECEIPT OF THIS ADDENDUM AND RETURN IT, AND ALL OTHER REQUIREMENTS WITH YOUR PROPOSAL. FAILURE TO SIGN AND RETURN WITH YOUR PROPOSAL COULD RESULT IN REJECTION OF YOUR PROPOSAL.

PROPOSERS SIGNATURE

PRINT OR TYPE PROPOSER'S NAME

COMPANY NAME

EMAIL ADDRESS

QUESTIONS FOR ITN 1627CCSA

1. The ITN states, "A well-developed Strategic Planning process will bring to the table prominent educational, business, and philanthropic leaders who have a stake in its success." Could you give us some examples of who they might be?

ANSWER:

Examples of prominent leaders could include business leaders in each city of Miami, Tampa, and Orlando, leaders from Helios Education Foundation and the Kresge Foundation, Florida Board of Governors members, local K-12 and State College Leaders, and Board of Trustee leaders from each university Board of Trustees. These leaders will be appointed by the Florida Consortium President's Council in consultation with the appointed consultant.

2. The ITN states, "The strategy of our Strategic Planning process should be an internal facing..." Could you elaborate on that?

ANSWER:

Yes, the role of this Strategic Plan is to design and outline a framework for how the Florida Consortium office will work with and coordinate opportunities with member universities including a business model, a production framework, and internal operations guidelines. The internal facing goal will also be a structure for determining what projects will receive priority from the Florida Consortium.

3. In phase II, item #4, the ITN states, "Select and seat a Florida Consortium advisory group to be determined and recruited by the Strategic Plan task force." Could you describe the purpose and function of that group?

ANSWER:

This will be the official Board of Directors for the Florida Consortium and will provide guidance and strategic direction from an outward facing POV. This group will be made up of leaders representing Miami, Tampa, and Orlando and will not be employed by any of the three member universities. The BOD will then help set regional priorities including incorporating the four pillars (Predictive Analytics, Targeted Student Support, High Tech Pathways, and Career Readiness) into formal connections with area leadership.

4. What is the target start and end date of the project and is it tied to a specific milestone or meeting?

ANSWER:

The target start date is August 1 and the target end date is September 20, 2018 to align with the September Board of Governors meeting.

5. What is your perspective on considering an accelerated timeline?

ANSWER:

We would consider it provided all voices are heard and the plan meets our needs.

6. Can you please provide additional detail on the \$2.711m in grants referenced in the proposal?
ANSWER:

Grant 1 – Helmsley Charitable Trust - Funding to develop implementation plans for improving instruction, transfer pathways and workforce alignment that will lead to increased persistence and success for STEM students at three large metropolitan universities in Florida. – Completed 2016

Grant 2 – Helmsley Charitable Trust - A grant from The Leona M. and Harry B. Helmsley Charitable Trust to support the Florida Metropolitan STEM Continuum: From College to Career program. The Florida Consortium will implement Network Improvement Communities (NICs), an action-oriented, collective impact approach to support students from college through careers.

Throughout the next 18 months, faculty from FIU, UCF, USF, educators from regional community colleges, and business leaders will work together to minimize barriers to persisting in Science, Technology, Engineering, and Mathematics (STEM) fields of study. Together, they will work to align expectations and support students in the transitions from community college or four-year institutions and on to higher wage careers in the Sunshine State. Through analysis of labor market trends, in coordination with review of college course offerings and career certifications, NICs will work to improve career pathways for STEM students in Florida.

Grant 3 and 4 – Planning grants from the Helios Education Foundation and the Kresge Foundation.

7. Does the project have a specific budget?
ANSWER:

Yes, there is a direct budget for the project that is committed to the project.

8. Can you describe more about the number and type of stakeholders you imagine being involved and from which groups?
ANSWER:

We think that there will be 18 direct stakeholders as part of the working group formed to address the project directly but the number of other stakeholders can run in the dozens over the span of three cities. These stakeholders will be educational leaders from k-12, two year, and higher education, philanthropic community, business leaders, university leadership, and policy leaders from Miami, Orlando, and Tampa.

9. Do you anticipate the optional phase being stakeholder intensive or largely independent analysis?
ANSWER:

The optional phase will be a largely independent research project.

10. Can you clarify the tasks specifically for Phase I, Phase II, and the Optional Contract?

ANSWER:

During Phase I, the firm will meet with Florida Consortium officials and stakeholders and then guide the Consortium through a process that will result with an agreed upon, actionable plan of strategic planning activities and projected timelines, as well as a plan for communicating with project stakeholders and bringing them together for focused work.

Phase II will consist of specific project tasks that have been identified as a result of the activities conducted in Phase I.

- 1. Develop an operational framework from which priorities for research and data sharing can be established.**
- 2. Utilize our collective knowledge of networks to produce a theoretical framework for the Florida Consortium.**
- 3. Outline a communications and workflow plan to ensure efficiency and manages the variations of three different university policies and procedures.**
- 4. Select and seat a Florida Consortium advisory group to be determined and recruited by the Strategic Plan task force.**
- 5. Procedural flow charts designed to better understand the complexity of our three organizations and to guide Florida Consortium staff on how to conduct business across university systems.**
- 6. Coordinate a resources development strategy aimed at ensuring prioritized projects have the institutional support necessary for completion. This strategy should include engagement with grant makers, university resources, and personnel time on task.**
- 7. A business plan for continued university and external funding which outlines at least 10 years of stable support from our partner universities and a strategy for targeting external grant makers and legislative funding.**
- 8. The curation of a set of Florida Consortium expectations and deliverables. What will the Florida Consortium be expected to produce for both internal and external consumption over the next 3-5 years?**

Optional – A formalized research report on the history and formation of student success programs including expectations, outcomes, and future considerations for each of the three member universities.

11. Is this contract a lump sum or unit price contract?

ANSWER:

Both (strategic planning and optional research) are lump sum.

12. Have you had any strategic plans created previously for the consortium? If so, who were the incumbents or vendors?

ANSWER:

No, this is our first formal strategic plan.

13. Can we bid on Phase I and not Phase II?

ANSWER:

No, this is a full, turn-key bid.

14. Can you provide an existing organizational chart for the consortium, and staffing plans for all three members?

ANSWER:

Posted on the Procurement Services website. <https://procurement.ucf.edu/solicitations/>

15. Will a project manager from each university be assigned? (3 member team)

ANSWER:

Yes, we are in the process of naming those participants now.

16. Have key stakeholders been made aware they will take part in this strategic planning effort?

ANSWER:

Not all of them. Part of our work is to identify and make suggestions of who will be a part of this process to the President's Council.

17. Have sponsors /champions been identified at each university to help guide this process?

ANSWER:

Yes, the Operation Leads (Organizational Chart) are the champions. This chart is posted on the Procurement Services website. <https://procurement.ucf.edu/solicitations/>

18. Will each university assign staff to assist with the project?

ANSWER:

Not directly, most of this work will be trained on Florida Consortium staff.

19. In Section One, there was mention of skepticism. Can you provide concrete examples of this skepticism toward strategic planning? What is it specifically?

ANSWER:

There is a bit of skepticism if universities which are designed to compete naturally are able to collaborate in a meaningful way. For example, how do we balance the needs of the university with that of the Consortium?

20. How will UCF support the firm if met with obstacles?

ANSWER:

We will work with our Operational Leads and the President's Council to ensure a smooth process.

21. How would the Consortium view several small companies merging to submit a proposal?

ANSWER:

We would find that acceptable.

22. How will this plan support your parallel efforts with FCAN?

ANSWER:

I don't think it really does. FCAN and the Florida Consortium are friendly neighbors, not really hardwire connected.

23. If existing barriers delay the timelines for deliverables what shall happen?

ANSWER:

We will apply for a 'no cost extension' from our funder and approval from the President's Council.

24. Can pre-bid attendees receive a copy of the sign in sheet, and all attendees on the phone?

ANSWER: Procurement services will answer this question.

25. What is the not to exceed budget for the entire strategic planning process? What about the for the optional data analytics work?

ANSWER:

This project is fully funded. Each supplier are encouraged to submit a proposal with their best pricing.

26. We noticed the contracting and procurement process is being conducted through the University Central Florida. Is the Consortium an independent legal entity? Can you please explain its relationship to the University?

ANSWER:

The University of Central Florida is the administrative host of the Florida Consortium. We are not a stand-alone organization. However, all three member universities (UCF, USF, and FIU) have equal share in the Florida Consortium.

27. Are there any significant dates (Consortium meetings, for instance) or deadlines that need to be included in a project timeline?

ANSWER:

Just the end date of September, 2018. Beyond that the Florida Consortium staff wants to work with the Consultant to set the timeline.

28. Is the Consortium open to a process that would take less than the proposed eighteen month timeline?

ANSWER:

Yes.

29. 1. In section 1.1, paragraph 7, item 4 states that the advisory group will be “determined and recruited by the Strategic Plan task force.”

- a. Please (i) clarify the roles, responsibilities, authority, and accountabilities of the task group; (ii) whether it will be seated before the consultation; (iii) whether the consultants will have a role in recommending composition and responsibilities.

ANSWER:

We hope that the consultants will have a role in recommending composition and responsibilities. That group has not been set.

30. 2. In section 1.1, paragraphs 4, 6, and 8, the ITN references “stakeholders.” During the pre-proposal meeting Dr. Preston referenced “internal” and “external” stakeholders, defining the latter as prominent educational, business, and philanthropic leaders (such as those referenced in section 1.1, paragraph 5).

- a. Please clarify whether the stakeholders referenced in paragraphs 4, 6, and 8 are internal, external, or both internal and external:
 - i. Paragraph 4, “...allow for stakeholders to respond and give concrete feedback at our 2018 Student Success Summit.”
 - ii. Paragraph 6, (first usage) “meet with Florida Consortium officials and stakeholders and then guide the Consortium...”
 - iii. Paragraph 6, (second usage) “a plan for communicating with project stakeholders and bringing them together for focused work.”
 - iv. Paragraph 8, “engage stakeholders to provide guidance and a plan of operations...”

ANSWER:

- 1. Paragraph 4 – Internal and External**
- 2. Paragraph 6 – Internal**
- 3. Paragraph 6 – Internal and external**
- 4. Paragraph 8 – Mainly Internal with some external**

31. Is it possible to get a pdf or other downloadable version of the Consortium’s 2015-16 Annual Report?

ANSWER:

Posted on the Procurement Services website. <https://procurement.ucf.edu/solicitations/>

32. 1. Section 1.1 — Statement of Objective. The document indicates that “Phase II will consist of specific project tasks (outlined below) that have been identified as a result of activities conducted in Phase I.” Is the list that follows (#1-8) the “specific project tasks” to be done in Phase II, or is that list part of what is expected in Phase I? The sentence that precedes the list suggests that #1-8 may be expected in Phase I. Can you please clarify?

ANSWER:

Yes, the list (1-8) are Phase II activities and Phase one work is to lead up to and plan the development of those deliverables.

33. 2. Section 1.1 - Statement of Objective, Activity 2, states that the External Strategic Planner will “utilize our [Florida Consortium’s] collective knowledge of networks to produce a theoretical framework for the Florida Consortium.” Generally, what does the Florida Consortium mean by the term theoretical framework? What outcome(s) will be supported by producing the theoretical framework?

ANSWER:

The term Theoretical Framework is to develop a scaffolding of opportunities, supported by data and research, of best and most promising collaborative opportunities and a structure for the Florida Consortium to conduct business in this collaborative environment.

The outcomes (to be updated) we are charged with supporting with all of our work are:

- **Increase the six-year graduation from 54% in 2012-2013 (2007 cohort) to an average of 71% in 2020 and 76% among all three universities by 2025.**
 - **Increase the number of baccalaureate degrees awarded from 27,658 in 2012-13 to 33,300 in 2020 and 35,400 in 2025.**
 - **Increase the number of degrees awarded to under-represented minorities to 14,450 in 2020 and 16,300 degrees in 2025.**
 - **Increase the number of degrees awarded to limited income students (Pell Grant recipients) to 17,900 degrees by 2020 and 19,200 degrees by 2025.**
- Increase the student participation rate in internships from 19,000 in 2012-13 to 24,000 by 2020 and 29,000 by 2025.**

34. Section 1.1 — Statement of Objective, Activity 4, refers to a “Strategic Plan Task Force.” What is the expected composition and role of that Task Force, and how would it work with the consultants?

ANSWER:

We will work with the Consultants to identify and seat that task force. We want the consultant’s guidance on this decision.

35. The ITN notes that UCF will not reimburse for travel expenses, but also notes that 112.061, Florida Statutes, govern UCF travel guidelines. According to 112.061(6)-(7), Florida Statutes, allowable travel and per diem expenses are identified. We request clarification for how travel and per diem expenses should be addressed in the proposal, particularly as it relates to the development of a fixed rate for Phase I and billing rates in Phase II.

ANSWER:

Please refer to the cover page of this addendum.

36. Is the Consortium looking to have specific research and data sharing vehicles/platforms identified within the proposal for the operational framework or should the process for establishing the research and data sharing be created?

ANSWER:

That process and framework is to be created. This currently does not exist.

37. Is there any information available on how UCF is currently using large data to understand the needs of students?

ANSWER:

Here are a few links to give some clarity:

http://provost.ucf.edu/provost_update/provosts-update-harnessing-big-data-for-student-success/

<http://provost.ucf.edu/files/Goals-EAB-SSC.pdf>

<https://today.ucf.edu/ucf-101-new-programs-and-big-data-primed-to-improve-student-success/>

38. What sort of predictive platforms have been tried by the university?

ANSWER:

Civitas and EAB are currently being utilized.

39. Has the university made an investment into AI technologies that perform analysis?

ANSWER:

At this time, AI Technologies is not a current supplier for the University of Central Florida.

40. Where can I find information on the philosophy to data science within UCF?

ANSWER:

<http://www.sdes.ucf.edu/eab>

<https://ikm.ucf.edu/facts-and-reports/common-data-set-cds/>