FLORIDA POLYTECHNIC UNIVERSITY
UNIVERSITY PROCUREMENT
LAKELAND, FL

ITN 23-054
STUDENT INFORMATION SYSTEM (SIS) PROJECT

DATE: 02/22/2023

ADDENDUM NO: Two (2)

SUBJECT: Questions and Responses

DUE DATE/TIME: March 6, 2023; 4:00 PM (ET)

PLEASE NOTE:
The following item(s) are issued to revise/ modify/ add information in the ITN and all associated documents. These item(s) shall have full force and effect as the ITN and all associated documents. Responses to be submitted on the specified response due date shall conform to the additions and revisions listed.

Q.1:   How many clock hour programs do you currently support?
Response: Florida Poly operates on a credit hour system. We do not currently have any clock hour programs. However, we may in the future add clock hour programs, so we are interested in a solution that offers support for these programs.

Q.2:   Can your extensibility requirements be met with configuration?
Response: It is impossible to answer such a general question without a more specific reference to particular requirements. The University's objective is to have a solution that can adapt to new and changing business needs, process requirements, and reporting requirements. The exact mechanism used to accomplish that flexibility is open for consideration. If respondent's proposed solution cannot natively meet the University's requirements, the University desires to understand what respondent-provided or third-party-provided tool or solution could assist with meeting the need.

Q.3:   Is it possible to submit the response entirely electronically, and if so how?
Response: As stated in Section 2.7 of the ITN, Respondent must submit the following:
a. One (1) printed hard copy original of the Proposal clearly marked as the original and containing an authorized representative's signature, title, and date of signature.
b. Three (3) electronic copies of the Response, preferably on a USB storage device. Do not provide the Response via email.

Q.4:   Would Florida Poly consider extending the proposal due date by two weeks?
Response: Based on the University's current timeline, it is not feasible to extend the proposal due date. The University appreciates respondents' efforts to provide a comprehensive response to the ITN within the identified timeframe.

Q.5:   Would Florida Poly accept ITN responses via email, rather than hard copy?
Response: See response to #3.

Q.6:   If Florida Poly will not accept email submissions of ITN responses, is a scan of the ink signatures as well as a scan of notary acceptable, rather than original ink signatures?
Response: Yes, please include the scanned documents in the appropriate tab of your proposal.

Q.7:   Considering that these items can be covered by Florida Poly's CRM (Salesforce):
      a.   What is the intent of Recruiting and Admissions section (section 12) on the Functional Requirements tab (tab D) in Appendix 1? Is Florida Poly expanding the project objective to look at other CRM solutions, such as a higher education enterprise CRM that enhances Recruiting & Admissions efforts?
Response: The University is focused on evaluating, selecting, and implementing a student system that delivers a broad range of capabilities for student information management. Florida Poly is thus interested in understanding how your student system meets each requirement as stated in the ITN

Q.8:   Considering that Florida Poly is utilizing Salesforce and implementing Stellic:
      a.   Regarding the Advising and Student Success section (section 1) on the Functional Requirements tab (tab D) in Appendix 1, is it the intent of Florida Poly to replace or augment these current systems with functionality provided from a higher education, enterprise wide cloud based CRM?
Response: See response to question #7 regarding Salesforce.

      i.   Please clarify the requirements for the Advising and Student Success section as necessary.
Response: For Advising and Student Success, although the University is implementing Stellic, our technology strategy is to favor consolidating as many functions as possible into common core system solutions and eliminate resource-intensive (in terms of support) integrations whenever possible. We are therefore interested in the Advising and Student Success functions supported by the SIS solution.

Q.9:   Considering that these features are embedded in our modern cloud SIS and Florida Poly is currently implementing the Stellic system as an advising and student success platform, which has features such as Advising, Degree audit, & Degree Pathways:
      a. Regarding the Degree Planning and Audit section (section 4) on the Functional Requirements tab (tab D) in Appendix 1, is Florida Poly's intent to replace or augment functionality in the Stellic system? If so, which would be the system of record for degree audit and degree pathways?
      ii.   Please clarify the requirements for the Degree Planning and Audit section as necessary.
Response: See response to question #8.

Q.10:   Regarding item 3.2 on tab F in appendix 1 ("Ability to provide an integrated single-vendor finance, HCM, and student system"), since the ITN is only for a modern cloud SIS, please clarify the use of "single-vendor" in the phrase.
Response: The University's choice of a student information system (SIS) platform is an immediate selection that must take place in the context of a long-term technology strategy that has an integrated cost-effective single-vendor ERP system as its ultimate preferred goal. Therefore, the University is interested in respondents' capabilities to enable seamless user experience, security management, and data integration across major processing modules such as student, finance, human resources, planning, and advising via a single-provider solution.

Q.11:   If it is the Intent of Florida Polytechnic University to examine an enterprise wide CRM, its functionality and capabilities for Recruiting, Admissions, Student Success, and Advising, please answer the questions below to allow for appropriate SaaS cost for the CRM.
Response: See response to questions #7 and #8 regarding CRM intent.

      a.   CRM Full User Licenses - For users that work in recruiting, admissions, and student success, how many users will need to perform any task within the system, including configuration, creation of reports, workflows, templates, rules, chat access to participate in Live

conversations with prospects, applicants, and students, etc.? Plus includes all the Light License functionality.

b. CRM Light User Licenses - For users that work in recruiting, admissions, and student success, how many users will be consuming data, reports, completing light tasks like updating contacts, activities, notes, cases trips, reviewing applications, adding success plans & To Dos, appointments, sending emails, SMS, etc.? *NOTE – Staff & faculty are able to submit an Anonymous Alert Form with NO license required.

c. How many users will interact with prospects, applicants, students, and others directly via live chat functionality? These users must also be in the CRM Full User License count.

d. How many non-live chatbot licenses are needed to interact with prospects, applicants, students, and other users? This chatbot performs multiple tasks, saving staff time and going well beyond simple questions and answers. This assistant answers questions and can route the conversation to a live person if needed and create follow-up help tickets.

e. How many SMS long codes are needed that can be assigned to specific users, departments or remain generic for texting constituents?

f. How many long code SMS inbound and outbound text Messaging in the USA is needed per month?

g. How many applications are received in a year?

Response: Regarding specific license and volume counts, respondents should outline the specific costs for each of the license types and cost elements that comprise total CRM licensing, including any tier-based pricing.

Q.12:   Our team would like to request an extension of the deadline to respond to 3/15/2023. Will Florida Poly be able to allow this extension?
Response: See response to #4.

Q.13:   5.8 - Optional Interviews:
Based on necessary product qualification, we request a series of interviews, ideally concurrent with announcement of the shortlist in March, for the following:
     1 hour: Registrar and student records
     30 min: Admissions and recruiting
     1 hour: Finance/student finance
Response: If determined to be in the best interest of the University, the University will request interviews after the ITN proposals have been opened.

Q.14: Ability to designate a student's residency status for tuition purposes, to include special categories as provisioned by state statute or other fee waiver processes. Please provide detail about the special categories and what data elements are used for these categories.
Response: Please refer to 1009.21(10) Florida Statute (https://flsenate.gov/Laws/Statutes/2021/1009.21) for listing of special categories. In addition to indicating a student as in-state or out-of-state, we would like a related field for sub-categories to indicate students who meet one of the special exceptions noted in the statute. Billing should be able to interpret these selections to assess appropriate fees.

Q.15:   Ability to calculate, award, and disburse aid for clock hour programs, including tracking attendance against thresholds to trigger disbursements.
How many clock hour programs are being supported?
Response: See response to #1

Q.16:   16.4 Ability to manage fees for exchange students with no institutional enrollment records

Are these students admitted and seeking a degree at the institution? If not, please provide additional information about these type of students.

Response: This requirement pertains primarily to exchange students.

We have exchange students from other countries who visit our campus for one or more semesters to take coursework unique to our institution as a non-degree student; they then can apply these credits towards their degree at their home institution. While the students are enrolled in Florida Poly coursework, their tuition and fees are paid to their home institution. We also have Florida Poly students who do the inverse. They enroll in coursework at foreign institutions that they transfer back to their Florida Poly degree. The tuition in this use case is paid to Florida Poly.

Q.17:   16.7 Ability to capture and assess all student meal plan fees and changes properly in student financials. Are students making their meal plan selections in StarRez or another 3rd party application? If not, how is this completed by the student and where is the decision entered to calculate the fees?

Response: Students currently make their meal plan selection via a custom process embedded in our current SIS, CAMS. Depending on the plan, they can choose to charge it to their student account or pay for it at time of purchase. If the former, CAMS simply adds the charge to the account. If the latter, they are redirected to make a payment using Transact Pay, a third-party system. Upon completion of a successful payment, both the charge and payment are integrated back to the student account in CAMS. The fee amount is determined by both a reference table in CAMS and by the item code setup in Transact Pay.

There is a separate integration from CAMS, based on the meal plan transactions on the student account, that is sent to Atrium, our 3rd party system for managing ID cards and meal plans. Atrium then keeps track of the meal plan and declining balance funds. That data is not passed back to the SIS or the finance system.

Q.18:   4.7 Ability to provide a report that includes external coursework and corresponding course information (if applicable). Is this question referencing transfer courses and the FL Poly course it satisfies?

Response: Yes, for state reporting purposes we need to indicate how we utilize articulated transfer credit and how it is applied or not applied towards the student's degree program requirements.

All respondents must acknowledge receipt of this addendum by signing below and submitting this executed document with your response. Failure to execute and return this addendum form may disqualify your firm's response.

This addendum shall become part of your firm's response and the subsequent documents if applicable.

Receipt Acknowledged:

Due Date/Time: March 6, 2023; 4:00 PM (ET)

Vendor name: _____

Address: _____

Phone number: _____Email: _____

Signature: _____