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FLORIDA POLYTECHNIC UNIVERSITY

UNIVERSITY PROCUREMENT

LAKELAND, FL

RFP 24-053

COST MANAGEMENT DATA ANALYTICS CONSULTANT

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DATE: 02/14/2024

ADDENDUM NO: One (1)

PLEASE NOTE: Questions and Responses

1.Question
Are there specific analytical tools or software that the University prefers to be used or has already licensed for this project (e.g., Tableau, Power BI)?
Response
The University prefers Tableau as the reporting platform and business analytic.

2.Question
Are you aware of missing data or incomplete data? Please provide identification of data type (e.g., vendor contract terms).
Response
To the best of our ability, the University has used its Workday ERP to process its purchases. However, because of the initial implementation of the platform or needs to categorize and track has not been as robust as we would like it to be today. As a result, we believe we have complete data but we are not confident that portions of these data are correctly categorized or classified. As part of this work effort, we will be reviewing the selected partner's initial runs of data and working with them to clean up outliers or incomplete categorizations. Related, we do are conducting an internal review and audit of our contracts and agreements as a proactive step to be sure we have a clear understanding of those terms and that they are accurately reflected in our system.

3. Question
What format is the data currently collected and stored (e.g., .csv, .xlsx, .txt, .pdf)
Response
Data is stored in Workday and can be extracted into an excel file.

4. Question
Can you better explain the following: "Develop a plan of action for continuing efforts and implementing in university culture" and provide the number of participants?
Response
The University is interested in support in implementing the recommendations that come out of the initial work effort and then a contractual option for a mid-term relationship (two- to five-years, as a suggested horizon) with the selected partner to support the success of the implementation. At a minimum, the initial implementation, in partnership with Procurement, would require development of communications, processes, and procedures for the University as well as change management support for each of our five major divisions. So to, at a minimum, the post-implementation support requires monitoring of the implementation and quarterly reporting on the effectiveness of the implementation and the University's spending against the implemented plan.

5. Question
Can you better explain the following: "Negotiate with Suppliers on Florida Poly's behalf to achieve better pricing and higher quality goods and services," including expectations for running and attending vendor meetings? How long do you expect this portion to be ongoing (e.g., 1 year? 2 years?).
Response
The University is seeking a partner that has deep experience and demonstrated knowledge in the commodities and services that the University utilizes. As a condition of the award, the selected partner will leverage that knowledge and experience in assisting the University in negotiations with commodity and services vendors, in an effort to obtain better pricing after the initial implementation.

6. Question
How many people will be accessing this solution on a regular basis? Are there additional stakeholders beyond these users?
Response
The University's Procurement Department and the Chief Financial Officer will be the primary users of the full and final solution. As part of the solution, a dashboard is strongly recommended that would, at a minimum, include the top 10 spend categories along with number of vendors and spend in each category. This dashboard would be available to the President and their Vice Presidents.

7. Question
How does this project fit into the University's long-term strategic goals, particularly concerning technological advancements and digital transformation?
Response
The University hopes to move towards a more strategic, efficient, and effective operation. To do so, we need clean and transparent data that is easily accessible. Through this analysis and effort, we our goal is to show savings of a minimum of one million dollars in the first year and through informed negotiations, discipled monitoring, and active tracking, significantly more savings across a two- to five-year horizon.

8. Question
How much historical data (number of periods, level of data) do you want to include (e.g., 5 years)?
Response
2-5 years

9. Question
Could you provide more detailed examples or case studies of the types of cost management problems the University currently faces?
Response
As a result of the rapid growth of our new university, we have reason to believe that maverick spend is an issue. As we continue to grow and mature, our goal is to analyze spending and, weighed against potential internal factors, where possible direct it to the most cost effective supplier(s) and/or method such as what types of contracts are most beneficial to award, where can we cut spending, award multiple vendors for one good/service or establish exclusive contracts, etc.

10. Question
What systems are currently being used by the University that provide data points (e.g., ERP, invoicing systems, etc.)? Please provide the name of the system with what type of data it contains.
Response

Workday

11. Question
Will there be a designated liaison within the University's IT department who will assist with access to data?
Response
The Director of Procurement will be the primary point of contact for the University and will be responsible for coordination with the University's ITS Division. In that effort, ITS may provide a point of contact, but that will not be determined until after the kickoff of the project with the selected partner.

12. Question
What do you consider the biggest challenge to overcome for this project to be successful?
Response
As with any initiative that involves change, stakeholders buy-in is the single biggest challenge anticipated for this project. A clear and concise plan for communication, collaboration, and management of change is essential for the success of this work.

13. Question
Will you please share responses provided for other questions?
Response
All Q&A is included in this document.

14. Question
Is there an expectation for support for the solution beyond one year?
Response
If the solution is determined to be advantageous and cost effective to the University, yes.

15. Question
"Request for copies of Respondent's two most recent financial and annual Reports"
As a privately held company, operating a global franchise business model for over 30 years, the financial and annual reports are not public documents, nor routinely released.   As consideration of such, ERA would like to ask if an NDA could be executed prior to Feb 23, 2024. Alternatively, this can be delayed until after the submission date with Financials to follow. Of course, we are open to any other direction, if other means have been used in a case such as this to meet the requirements of the University under RFP in the past.   As note, I have provided an attachment here of our NDA solely for your convenience if desired.
Response
The University will accept a note from your bank indicating that your finances are in good standing.

16. Question
a. Could you please clarify if the " % Contract Administration Fee" is to be charged on the use of this contract for services provided to Fl Polytechnic University, or for all other entities use aside from FL Polytechnic University, or both?
Further as clarification, is there a published, expected, or customary fee % under similar such contracts?
And/or could any data be provided to better understand the costs the University incurs for Contract Administration of a contract like this?
Response
An administrative fee may be charged on all agreements resulting from Florida Poly and Successful Respondent's finalized agreement but will be part of the Committee's evaluation for the selection of the best partner.

As part of a response to this RFP, interested respondents should indicate the percentage rebate being offered to the university as the result of any awarded contract. Respondents will be expected to propose a contract administration fee as well as indicate if they are willing to extend the contract to other Universities and entities.

b. Section 4.5 was referenced but only 4.4 was represented in the RFP. page 13.
Response
% of contract that successful Offeror and University agree on will be paid to the University by Successful Offeror.
2.2.4 Tab D: Financial Proposal section 4. is being revised to state:
4. Include any percent (%) contract administration fee successful Respondent will pay Florida Polytechnic University for goods/services provided and invoiced during the quarter as described in Section 4.4.

17. Question
In terms of " The following constitute the contract", and in accordance with a,b, and c of this section, is the University also expecting and willing to sign the successful respondents Client Engagement Agreement? Further, would it be within response specifications to include that agreement within a Tab or as an attachment or Addendum to the response?
Response
Please include any and all terms and conditions and/or documents that you are requesting the University to agree to and/or sign.

18. Question
What is the current/expected volume of data ?
Response
Response
The university would like the data over the past 2-5 years analyzed.

19. Question
Where and how current data is stored?
Response
In the University's ERP system – Workday.

20. Question
Type of data to be analysed (e.g: Structured, unstructured, streaming)
Response
Structured.

21. Question
Mode of availability of the data? (Online : e.g. Web accessible/Offline: in some storage drive etc)
Response
Data will be provided in an excel spreadsheet delivered via email or secured cloud storage medium. Additional access may be granted to successful Respondent.

22. Question
Any data retention policy ? e.g: minimum 15 years data needs be available at all the times
Response
Data retention policy varies based on the funds being used. The normal data is expected to be retained for 3 -

23. Question

Any data secuirity measures and adherence to privacy regulations (e.g GDPR, HIPPA) in handling sensitive or confidential data?

Response

PII Data security measures must be followed. If there are other security measures, the University will notify the Successful Respondent during or prior to contract negotiations.

24. Question

Any policies and procedures for data governance, access controls, and data protection that needs to be adhered?

Response

Data requests will be managed by the project's point of contact, the Director of Procurement. Specifics on this can be discussed through her with the selected partner during contract negotiations.

25. Question

Any technical constraints such as compatibility with existing systems, data security protocols, compliance standards?

Response

None that we are aware of at this time.

26. Question

Currently any dashbord or reporting in place that needs to be replicated?

Response

None at this time.

27. Question

Details of existing infrastructure set up, if any?

Response

N/A

28. Question

Any preferred or ongoing engagement with cloud Service provider e.g. AWS, GCP, Azure?

Response

None at this time.

29. Question

New infra structure cost to be included in the proposal, if needed? Or University will provide it as per their preference?

Response

The University prefers to leverage and use its existing systems and infrastructure. Depending on what platform this analysis, output, and reporting may use, we would like to first leverage our systems – however, we are open to new systems and have a structure in place to review and approve these should one be needed.

30. Question

Current Hardware and Software being used? Any recommendation or prefernce of reporting tools and technolgies being used , Tableau, PowerBI etc?

31. Question
Any specific quality assurance processes to ensure data accuracy and reliability?

32. Question
Any specific project timeline and milestones, seeking alignment with University's deadlines and priorities?

33. Question
Any preference on team structure/composition? Onshore (US)/Offshore (India)/Nearshore (Canada, Mexico etc)

34. Question
Any specific softwares licenses that needs to be used? Cost to be included in the proposal?

35. Question
What is the overall budget /budget range of the project ?

36. Question
Under which Department or Organizational Unit this initiative would report to? It falls under the purview of CTO/CDO/CIO etc?

37. Question
Who will be the end users of this report?

38. Question
Is procurement centralized across the University or do various departments/offices maintain rsponsibility under general University policies and oversight?

All procurement flows through the Procurement Office. However, the University utilizes a credit card program that allows cardholders to shop within the set guidelines of the University.

39. Question
What system(s) are being used to track the procurement process from quotation to contract, contract to services/goods rendered, and ultimately payment processing.
Response
Workday

40. Question
What is the availability of detailed expense reporting in the system(s)? What are the data fields currently available in the system(s) through reports or data extraction (i.e., expense categories, contract type, amount, date, approvals, etc.)?
Response
The University currently has access to provide reports on spend categories, invoices, purchase orders, contract type, amount, suppliers, date etc.

41. Question
Are any of the expenses related to areas with additional compliance requirements, such as, Sponsored Research, earmarked funds, etc.?
Response
Yes, Foundation spend is of interest, but our focus is University funds.

42. Question
Does the University have any analytics platforms currently in use that could be leveraged for this project?
Response
The University uses Workday as the ERP system of record. The data needed is housed on this platform.

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.

Due Date/Time: February 29, 2024, 2:00 PM (ET)

Receipt Acknowledged:

Vendor name: _____

Address: _____

Email: _____

Phone: _____

Authorized Representative: _____

Authorized Representative Signature: _____