



RFP #: RFP763-21-146498 JR
TITLE: Process Improvement

SUBMITTAL DUE DATE: December 23, 2020, 2:00 pm, local time
DATE: December 17, 2020

Addendum #1

Please note the following clarifications are hereby made to the aforementioned RFP.

Update/Change

Is there a preferred start date for the engagement? **We would want to start immediately after selecting a vendor.**

Must the engagement be completed by August 31, 2021? **Yes**

Must the vendor deliver training in person, or can the training be delivered virtually? **Our desire is for in person training, unless the pandemic makes that unsafe.**

In Section #1.1, the RFP states the proposal will be for UNTS, UNT, HSC, and UNTD. Just for clarification, it appears to be a broad request and that is our approach. Should I ignore the objectives of HSC in section 1.2 or consider those objectives to apply to the entire request?

This RFP is just for the HSC campus, however the RFP is written for all campuses in case any other campus is looking for similar services they can use the awarded vendor of this RFP

What is the planned or estimated number of people to be developed for the Lean Team? 2. At which UNT locations are the Lean Team members located? **We are thinking +/- 10 individuals. We would seek input on this from our chosen Vendor.**

Are the proposed Lean Team members already assigned a project or project area for an improvement project? If so, what are those proposed projects or project areas? **We have not chosen the Lean Team and not chosen specific projects yet. We have reached out across campus to obtain a list of desired processes that colleagues desire to be worked on. The idea would be for the Vendor to help us whittle this resulting list down to the projects that will be completed in FY '21, and which will be used during the training of the Lean Team.**

Will leadership or executives be championing the various projects or otherwise participating in the Lean Team? **It is not anticipated that they will be participating in the Lean Team. The overall effort (process improvement) is on the HSC strategic roadmap, and therefore is a high-priority item with implicit championing from the entire Cabinet. It will be reported on up to the Cabinet throughout the year. We are purposefully desiring that there is not a strong "top-down" push on the projects, but that there is a "bottoms-up" focus. Another way of saying this is that we want the ideas to come from the people who actually work in the affected areas, so that they are fully invested.**

Regarding RFP 5.2 (3), please describe the "defined number of initial process improvements ("Initial Lean Projects") and whether or not these are defined by UNT or to be identified by the vendor. **We have reached out across campus to obtain a list of desired processes that colleagues desire to be worked on. The idea would be for the Vendor to help us whittle this resulting list down to the projects that will be completed in FY '21, and which will be used during the training of the Lean Team.**

Does the client have a vision on how large the vendor's team (how many personnel) will be that provides the requested services in the RFP? **No. We will leave that to the Vendor. Our focus is more on the outcome than on how many people it takes to get there.**

Will, the vendor be involved in the selection process of the volunteers for the initial "Lean Team"? **We have reached out to the Cabinet to solicit recommendations for team members to be included. These proposed individuals will not be notified until we have a Vendor selected. We anticipate we will have more proposed individuals than the desire number of volunteers, and therefore will be open to the Vendor having input into the composition of the Lean Team. It is not a requirement that the Vendor help choose the Lean Team.**

Is there a methodology of project management (PMP, Agile, Lean, ect) that the client currently performs in its organization, prefers, or hopes to institute? If so, please advise. **We will seek input and advice from the Vendor on this. Generally, we are looking to have a methodology that is able to be learned by team members without having to get fully certified in any specific methodology, and which can be ultimately taught by the initial "Lean Team" to others on the campus in order to have it replicated across campus. The Lean methodology has been the methodology that we have gravitated towards in our discussions thus far.**

Has the client identified any barriers organizationally or operationally that will prohibit the desired state? **No.**

Assuming the client has migrated toward remote working due to COVID: How has it affected output? **We have experienced the typical challenges that one might expect with the disruption around remote working. We feel that we have adapted remarkably well and kept up our standards of output.**

Does the client have a concept or expectation on how much of this scope will have to be conducted remotely due to COVID? **We do not. We will need to be flexible depending upon the environment. However, if a proposed Vendor feels that they would not be able to accomplish the requirements of this RFP if remote work is required due to the pandemic, we ask that the Vendor specifies this in the response.**

Can a TX HUB certified vendor propose as a Prime vendor, and participate as a Sub-consultant on another proposal? **Yes**

Will the University grant an extension to the proposal due date? **There will not be an extension of the proposal due date, responses are due 12/23/2020 at 2:00pm local time**

Is UNTS open to firms with different areas of expertise and industries proposing together to offer a solution that provides a diverse team and fresh perspective? **The RFP states our preference for the Vendor to have experience within the Higher Education arena, but does not require it.**

What is the desired start date of the project and the end date to have work completed? **Start date immediately after Vendor selection. End date of 8/31/2021**

Has UNTS worked with a consultant to conduct process improvement initiatives in the past two years, and if so, what was the nature of these projects? **No.**

Does UNTS seek to have the consultant perform work: **Our preference would be primarily on-site for face-to-face interaction with the potential for periodic updates being virtual if necessary. However, given the pandemic, we understand that virtual interaction might be required based on the then prevailing conditions.**

- a. On-site?
- b. Virtually?
- c. Combination on on-site and virtual?

Does the proposer need to provide hourly rates for team members? **Please include all fees/charges, discounts and services that might apply to the scope of service in your bid response.**

Is there an incumbent who is performing this work now, or has in the past? If yes, who? **There is not currently an incumbent who is performing this work now, and there has not been during the past two years.**

Is there a budget for this project that can be shared? If so, please provide details. **The budget cannot be shared.**

The proposer's quality of references from similar projects, completed from comparable institutions." Given the short turnaround time for the proposal submission it is unlikely that proposer's references will be able to complete and return past performance information in time for inclusion into the proposal. Would it be acceptable to submit past performance information from similar projects that include that include Point of Contact information instead? **UNTS is not requiring**

the Proposer to provide past performance information for references. Ultimately, when UNTS contacts references, we will want to know what the performance outcomes were. If that performance information is provided in the Proposer's response, it would be beneficial...but not required.

Will the vendor be involved in the selection process of the volunteers for the initial "Lean Team"? We have reached out to the Cabinet to solicit recommendations for team members to be included. These proposed individuals will not be notified until we have a Vendor selected. We anticipate we will have more proposed individuals than the desire number of volunteers, and therefore will be open to the Vendor having input into the composition of the Lean Team. It is not a requirement that the Vendor help choose the Lean Team.

How many HSC employees does UNTS anticipate being engaged in the Initial Lean Team? We are thinking +/- 10 individuals. We would seek input on this from our chosen Vendor.

Regarding Section 5.1 (Vendor Minimum Requirements/Qualifications), the RFP states "Proposer should be able to provide examples of case-studies of work...". Content in case studies varies widely. Please advise on the content UNTS desires in a case study? The purpose of the case studies is to allow the Proposer to show UNTS how they have executed on similar engagements in the past...and for UNTS to see examples of the scope, process, and results of prior work.

In the scope of services (section 5.1), How would you like us to present the examples of case studies? Written format. The purpose of the case studies is to allow the Proposer to show UNTS how they have executed on similar engagements in the past...and for UNTS to see examples of the scope, process, and results of prior work. Whatever format the Presenter feels best to share this information is welcomed by UNTS.

How do you anticipate the training to be delivered? Our desire is for in person training, unless the pandemic makes that unsafe. We estimate the number of participants at +/- 10, but will also seek guidance from the Vendor around the size of the initial Lean Team.

- a. Will some of the training be virtual?
- b. Is Fort Worth the only location where training classes will be delivered? Yes.
- c. Given the pandemic and the space requirements for each class, what will be the typical class size for the onsite training?
 - i. This may impact how we do group exercises.

Is the initial lean team members going to be a combination of students and staff members? No. Staff members only.

What criteria has been established to nominate or designate the "initial lean team" – Are these valued team members based on interest or skill level or most knowledgeable SMEs with the current processes. We have reached out to the Cabinet to solicit recommendations for team members to be included. These proposed individuals will not be notified until we have a Vendor selected. We anticipate we will have more proposed individuals than the desire number of volunteers, and therefore will be open to the Vendor having input into the composition of the Lean Team. We have not required that the individuals be the most knowledgeable SME's with the current processes, since it is currently unknown which processes will be addressed in FY 2021. The idea is for the initial Lean Team to be cross-functional and not necessarily tied to the specific area in which the improvements would be addressed in FY 2021.

What HSC functions/departments are within scope (Provost, Finance & Ops, Research, Govt. Affairs, Compliance & Integrity, Administrative) to identify savings opportunities? All departments are currently in scope...however selecting the processes to be addressed in FY 2021 will necessarily result in only a few departments being addressed. The processes have not yet been selected/identified for improvement. We have reached out across campus to obtain a list of desired processes that colleagues desire to be worked on. The idea would be for the Vendor to help us whittle this resulting list down to the projects that will be completed in FY '21, and which will be used during the training of the Lean Team.

Are there any areas for savings opportunities "untouchable" or out of scope (for example: HSC SG&A, or other UNT campuses)? We are limiting the FY 2021 savings opportunities to those identified on the HSC campus (i.e. not other UNT campuses).

What % of time will be dedicated to this initiative from the Initial Lean Team? **We will solicit input from the chosen Vendor on this. However, initial estimates are < 20%.**

Is there any existing process documentation available for assessing maturity? **None that is available.**

Do you expect the HSC lean team to achieve their green belt Six Sigma certification through the training? **This is not a requirement. We will solicit input from the chosen Vendor on this, but we are not looking at a metric that includes a number of HSC lean team achieving their green belt Six Sigma certification. We are much more interested in ensuring that this team is adequately trained to be able to replicate the process with others on campus.**

Does UNTS already have a survey platform license agreement in place (Qualtrics, Survey Monkey)? **We do use Qualtrics.**

How big is the organization? **Estimated enrollment-2,300. Estimated faculty/staff headcount-1,330**

-End of Addendum-

Jill Roys

Issued by

December 16, 2020

ACKNOWLEDGEMENT: Please acknowledge receipt of this addendum by initialing the appropriate line on the Addenda Checklist, Section 4 of the RFP.