



Campus Management Corporation  
Technical Proposal Addendum #1A for  
Francis Marion University RFP #5400010443

## Table of Contents

Purpose of Addendum 1A.....	3
Clarifications and Revised Answers .....	4
Campus Management Corp. Financial Audits.....	10
SchoolDocs Project Team Résumés .....	11

## Purpose of Addendum 1A

Campus Management Corp. is providing Addendum 1A in response to the document issued by Francis Marion University called ***Matters for Discussion/Clarification: Concerns Regarding Proposal of Campus Management Corporation*** that was issued on March 14, 2016 regarding RFP #5400010443. This addendum contains content that is specific to the technical proposal for that RFP. As instructed by Francis Marion University, our revised answers are included in this addendum document. A complementary addendum, Addendum 1B, is also being provided to Francis Marion University. That complementary addendum contains items that are relevant specifically to the business proposal for RFP #5400010443.

Should the university require any additional information or clarification regarding our revised answers, we invite the Francis Marion University to contact us at its convenience. The contact for our proposal is Alex Serna. Mr. Serna can be reached by email at [aserna@campusmgmt.com](mailto:aserna@campusmgmt.com) and by phone at 954-815-9875.

***"We have identified the following deficiencies in your proposal that will result in rejection as non-responsive unless corrected. You may address these deficiencies by submitting revisions to any aspect of your proposal, but only to the extent such revisions are necessary to resolve the deficiency identified." – Francis Marion University, March 14, 2016***

---

## Clarifications and Revised Answers

1) In accordance with the Solicitation Section V. Qualifications – Qualifications – Required Information - Page thirty (30):

- Please list any failed projects or any clients within the last three (3) years that are no longer current clients. Provide a description of the system and modules that were in production, number of years in production and state the reason(s) why the project failed or why the client terminated the relationship.

**Original Answer:**

*Campus Management Corporation Technical Proposal – Page fifty-five (55), starting at paragraph five (5) Annotates: Please understand that contract cancellations consist of confidential information between Campus Management Corp. and our former clients. Due to those confidentiality agreements, we cannot publish the names and contact information of former clients without their prior approval. However, this information may be provided to Francis Marion University should the university be willing to complete a non-disclosure agreement (NDA) and should the associated parties agree to the disclosure.*

**Revised Answer:**

*Campus Management Corp. has not experienced any failed projects nor had any customer defections in the past (3) three years with public, not-for-profit higher education institutions using our Enterprise Resource Planning (ERP) System. Campus Management has experienced a small number of lost customers for other types of institutions (e.g. for-profit institutions) primarily due to institutional decisions to cease operations under unfavorable market conditions.*

- The Offeror shall also provide evidence of the Offeror's financial ability to carry out the project. All evidence under this requirement shall be in sufficient detail to allow an adequate evaluation by the state's RFP team. Offerors should provide corporate financial information i.e. Balance Sheet, Income Statement/Profit and Loss Statement including, but not limited to, audited company financial statements for most recent three (3) fiscal years. In addition, request a cover letter from the individual evaluating the financials to indicate if the financial data was audited, complied, or reviewed. Acceptable secondary forms of financial stability would include: Annual Reports, and/or any Dunn & Bradstreet Ratings, etc. However, audited financials are preferred.

**Original Answer:**

*Campus Management Corporation Technical Proposal – Page fifty-six (56) Annotates: As a private company, Campus Management Corp. does not publicly disclose financial details. However, we would be happy to provide, upon direct request, Francis Marion University with all information required for this particular RFP item. We respectfully invite the university to contact Campus Management Corp. for the required proofs of financial stability. Please understand that securing the required financial documentation may also require that Francis Marion University complete a non-disclosure agreement (NDA).*

**Revised Answer:**

*Campus Management Corp. is providing Francis Marion University with two audited financial reports that span the three past complete fiscal years. Those audited reports are included in this addendum's section called **Campus Management Corp. Financial Audits**. Note that we have marked both reports as being confidential.*

- Identify same information as stated above for key personnel of all proposed third (3<sup>rd</sup>) party business partners.

**Original Answer:**

*Campus Management Corporation Technical Proposal – Page fifty-nine (59) Annotates: Campus Management Corp. respectfully requests that the university contact or third-party partner, SchoolDocs, directly for the personnel that they may schedule for this project. The contract information for SchoolDocs is located in the **Subcontractor-Identification (Feb 2015)** section of this proposal document.*

**Revised Answer:**

*Francis Marion University, SchoolDocs has provided us with the résumés for the SchoolDocs project team. We are including those résumés in the **SchoolDocs Project Team Résumés** section of this addendum.*

**Note: Disclosure of information - In accordance with the Solicitation Section II. Instructions to Offerors – A. General Instructions - Submitting Confidential Information - page fourteen (14):**

**SUBMITTING CONFIDENTIAL INFORMATION (FEB 2015)**

(An overview is available at [www.procurement.sc.gov](http://www.procurement.sc.gov)) For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the word "CONFIDENTIAL" every page, or portion thereof, that Offeror contends contains information that is exempt from public disclosure because it is either (a) a trade secret as defined in Section 30-4-40(a)(1), or (b) privileged and confidential, as that phrase is used in Section 11-35-410. For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the words "TRADE SECRET" every page, or portion thereof, that Offeror contends contains a trade secret as that term is defined by Section 39-8-20 of the Trade Secrets Act. For every document Offeror submits in response to or with regard to this solicitation or request, Offeror must separately mark with the word "PROTECTED" every page, or portion thereof, that Offeror contends is protected by Section 11-35-1810. All markings must be conspicuous; use color, bold, underlining, or some other method in order to conspicuously distinguish the mark from the other text. Do not mark your entire response (bid, proposal, quote, etc.) as confidential, trade secret, or protected. If your response, or any part thereof, is improperly marked as confidential or trade secret or protected, the State may, in its sole discretion, determine it nonresponsive. If only portions of a page are subject to some protection, do not mark the entire page. By submitting a response to this solicitation or request, Offeror (1) agrees to the public disclosure of every page of every document regarding this solicitation or request that was submitted at any time prior to entering into a contract (including, but not limited to, documents contained in a response, documents submitted to clarify a response, and documents submitted during negotiations), unless the page is conspicuously marked "TRADE SECRET" or "CONFIDENTIAL" or "PROTECTED", (2) agrees that any information not marked, as required by these bidding instructions, as a "Trade Secret" is not a trade secret as defined by the Trade Secrets Act, and (3) agrees that, notwithstanding any claims or markings otherwise, any prices, commissions, discounts, or other financial figures used to determine the award, as well as the final contract amount, are subject to public disclosure. In determining whether to release documents, the State will detrimentally rely on Offeror's marking of documents, as required by these bidding instructions, as being either "Confidential" or "Trade Secret" or "PROTECTED". By submitting a response, Offeror agrees to defend, indemnify and hold harmless the State of South Carolina, its agencies, officers and employees, from every claim, demand, loss, expense, cost, damage or injury, including attorney's fees, arising out of or resulting from withholding information by the State of South Carolina or any of its agencies, that Offeror marked as "confidential" or "trade secret" or "PROTECTED". (All references to S.C. Code of Laws.) [02-2A125-2]

**Additionally all source selection team members prior to being provided any offeror’s documentation are required to sign; A Non-Disclosure Agreement; A Procurement Integrity Representations and Restrictions agreement and must abide by the Freedom of Information Act and State of South Carolina Ethics Laws.**

*Campus Management Corp. response: Campus Management understands agrees to the provisions regarding the submitting of confidential information.*

*Additionally, Campus Management understands the requirement regarding the source selection team members be required – prior to being provided any offeror's documentation – to sign a*

*non-disclosure agreement; a procurement integrity representations and restrictions agreement, and that said team members must abide by the Freedom of Information Act and State of South Carolina ethics laws.*

2) In accordance with the Solicitation Section V. Qualifications – Qualifications – Subcontractor – Identification - Page thirty-one (31):

**SUBCONTRACTOR -- IDENTIFICATION (FEB 2015)**

If you intend to subcontract, at any tier level, with another business for any portion of the work and that portion either (1) exceeds 10% of your cost, (2) involves access to any "government information," as defined in the clause entitled "Information Security - Definitions," if included, or (3) otherwise involves services critical to your performance of the work (err on the side of inclusion), your offer must identify that business and the work which they are to perform. Identify potential subcontractors by providing the business name, address, phone, taxpayer identification number, **and point of contact**. In determining your responsibility, the state may contact and evaluate your proposed subcontractors. [05-5030-2]

**Subcontractor's References**

The subcontractor’s references should include, but not limited to, three (3) references of comparable size and complexity. The references should include:

- Client name
- Client address
- Contact name
- Telephone number
- Email address
- Description of the working and contractual relationship with the primary Offeror.
- Brief summary of the project including the date of installation

Offerors should provide subcontractor’s references and financials if any subcontractor will contribute more than 10% of the performance requirements of the contract. In additional, The State may or may not elect to contact the reference provided.

**Original Answer:**

*Campus Management Corporation Technical Proposal – Page fifty-nine (59) Annotates: Campus Management Corp. respectfully requests that the university contact or third-party partner, SchoolDocs, directly for the personnel that they may schedule for this project. The contract information for SchoolDocs is located in the **Subcontractor-Identification (Feb 2015)** section of this proposal document.*

**Revised Answer:**

*Our subcontractor, SchoolDocs, will not be contributing more than 10% to the performance requirements of the contract nor will SchoolDocs perform work that exceeds 10% of the project cost. Further, we do not expect SchoolDocs to have access to any government information.*

Information requested for SchoolDocs is provided below:

**SchoolDocs, LLC**

Andrew R. Hatfield  
Vice President of Sales and Marketing  
Office: (866) 311-2293 x 708  
Email: [ahatfield@schooldocsllc.com](mailto:ahatfield@schooldocsllc.com)  
Tax ID: 20-3233766

SchoolDocs will be integrating its SchoolDocs add-on software with our ERP solution for Francis Marion University.

As mentioned, SchoolDocs will not be performing more than 10% of the performance requirements nor will SchoolDocs involvement in this project exceed 10% of the project's cost. However, for your convenience, we are providing basic reference information from SchoolDocs for Francis Marion University:

**College America, Independence University**

Craig Sanders  
Director of Information Technology  
Work: (801) 281-7620 x1100  
Direct: (801) 284-8378  
[craig.sanders@collegeamerica.edu](mailto:craig.sanders@collegeamerica.edu)  
4021 South 700 East Suite 400  
Salt Lake City, UT 84107

**Colorado State University (Global)**

Mike Prudhomme  
Director of Technology  
Colorado State Global  
(970) 484-8769  
Ft. Collins, CO 80523 USA

**Kaplan University**

Mark E. Mullison  
Executive Vice President and Chief Information Officer  
Education Corporation of America  
Work: 205-329-7942  
[mark.mullison@ecacolleges.com](mailto:mark.mullison@ecacolleges.com)  
3660 Grandview Parkway, Suite 300  
Birmingham, AL 35243

**You must agree to remove the language located in your Company’s response which conflicts and/or takes exception to the RFP’s terms and conditions. You must acknowledge your understanding that all changes will be done in accordance with the terms and conditions as outlined in the solicitation.**

*Campus Management Corp. response: Campus Management Corp. agrees to remove language located in our company's response that conflict with or takes exception to the RFP's terms and conditions. We also acknowledge our understanding that all changes will be performed in accordance with the terms and conditions as outlined in the solicitation. We defer to Francis Marion University for guidance and discussion regarding language that the university believes may conflict with and/or takes exception to the RFP's terms and conditions.*

**NOTE:**

3) In accordance with the Solicitation Section VI. Award Criteria – Discussions and Negotiations - Required - Page thirty-one (31):

**DISCUSSIONS AND NEGOTIATIONS – REQUIRED (FEB 2015)**

No award will be made to an offeror until after negotiations have been conducted with that offeror. As provided in Section 11-35-1530, negotiations must begin with the highest ranking offeror; accordingly, submit your best terms from both a price and a technical standpoint. In addition, make sure your offer is responsive; the State will not evaluate or negotiate with a non-responsive offeror, and ordinarily, nonresponsive proposals will be rejected outright without prior notice. The State may elect to conduct discussions, including the possibility of limited proposal revisions, but only for those proposals reasonably susceptible of being selected for award. [11-35-1530(6); R.19-445.2095(l)] If improper revisions are submitted during discussions, the State may elect to consider only your unrevised initial offer, but only if your initial offer is responsive. If a satisfactory contract cannot be negotiated with the highest ranking offeror, the State may elect to conduct negotiations with other offerors. As provided in Section 11-35-1530(8) the State also may elect to make changes within the general scope of the request for proposals and provide all responsive offerors an opportunity to submit their best and final offers. Negotiations may involve both price and matters affecting the scope of the contract, so long as the changes are within the general scope of the request for proposals. [06-6059-1]

*Campus Management Corp. response: Campus Management Corp. has read and understands the stipulations in the above **Discussions and Negotiations – Required (Feb 2015)** section.*

# Campus Management Corp. Financial Audits

**Important:**

Francis Marion University, due to the university's mail server file size limitations, the two financial audit documents for this section are being provided to the university as separate standalone documents.

## SchoolDocs Project Team Résumés

# Jeromy Gensch

12331 N Gessner Houston, TX 77064  
(303) 520-8966 [jgensch@schoolDocsllc.com](mailto:jgensch@schoolDocsllc.com)

---

*Project Manager, Software Implementation Specialist, Database Engineer, Product Trainer*

---

## PROFESSIONAL EXPERIENCE

### SchoolDocs, LLC

Houston, TX

Software Implementation – Coordinator and Project Manager

2010 – Present

Technology Design – Product Coordinator

2007 - 2010

Customer Service- Specialist

2005

- Managed and coordinated large-scale software implementation projects for a wide range of Higher Education Institutes and departments
- Coordinated design teams and product engineering for software development in multiple platforms and databases
- Managed customer accounts and quality control services for Higher Education Institutes with focus in career colleges and vocational environments

### Context Software, Inc.

Seattle, WA

Project Manager

2003 -2005

- Managed electronic record keeping projects for various software systems and databases
- Managed customer service accounts for document management focused on Energy-based clients

### PC Nations, LLC

Denver, CO

Software designer

1999 - 2003

- Coordinated software design and database overview schema
  - Wrote business plans for developing new vertical markets
- 

## EDUCATION

Wichita State University

Wichita, KS

Masters in Business Administration

1999 Graduate

B.A. in International Business Management

1998 Graduate

---

## SKILLS

- Familiar with all types of Computer Software, with an emphasis on Document Management, Records Management, Accounting, HR
- Disciplined, organized and goal oriented
- Exceptional communication skills, self-confident and motivated
- Have the ability to work independently and self-motivated and collaborate well with group activities

# Tess DeGraffenreid

366 FM 1488 The Woodlands, TX 77384  
(206) 850-2880 [tessdeg@schooldocsllc.com](mailto:tessdeg@schooldocsllc.com)

---

*Product Trainer, Database Specialist, Customer Service Coordinator, Implementation Manager*

---

## PROFESSIONAL EXPERIENCE

### SchoolDocs, LLC

Houston, TX

Customer Service – Enterprise Level large School Coordinator

2012 – Present

Software Implementation – Product Implementation Specialist

2008 - 2012

Customer Service- Small School Coordinator

2006 - 2008

- Managed customer accounts at Enterprise Level large school environments (Higher Education)
- Managed and coordinated software installation projects
- Worked with teams focused on document management software and support services

### Acct1st Technology Group, LLC

Dallas, TX

Project Manager

2003 -2006

- Managed electronic record keeping projects for various software systems and databases
- Managed customer service accounts for document management focused on the Accounting and CPA Profession

### Net Impact Software, Inc.

Wichita, KS

Project Manager

1998 – 2003

- Managed digital well log database implementation for Kansas Geological Library project
- Specialized in Document Imaging and Library Science for Kansas Geological Library project

---

## EDUCATION

Wichita State University

Wichita, KS

B.A. in Business Marketing

1998 Graduate

---

## SKILLS

- Experience administrating software applications in the area of document imaging, records management, and databases
- Organized, focused, disciplined
- Exceptional ability in the area of management and customer service

# Brad Dierking

(858) 336-3329 [bdierking@schooldocsllc.com](mailto:bdierking@schooldocsllc.com)

---

*Product Trainer, Database Architect, Software Programmer, Customer Service Specialist*

---

## PROFESSIONAL EXPERIENCE

### SchoolDocs, LLC

Houston, TX

Software Integration Development- Chief Integrations Developer

2015 – Present

Software Implementation – Product Design Specialist

2013 - 2015

- Managed enterprise level software integration and coding projects
- Coordinated product design and implementation deployment

### Digital Functionalism, Inc.

San Diego, CA

Project Manager

2009 -2013

- Specialized in Web development and software product design
- Managed coding projects for integrated platforms and various database systems

### Castle Advertising

San Diego, CA

Technical Manager

2005 – 2009

- Managed digital Ad campaigns for web presence, Online training, and optimization
- Specialized in web-based technology platforms and coding and various different languages

---

## EDUCATION

San Diego State University

San Diego, CA

B.S. Computer Science

2005 Graduate

---

## SKILLS

- Exceptional ability in project coordination and communication skills
- Expert in Database design and web-based integration service architecture
- Organized and highly motivated