

COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-2050-2024

This contract entered into this 17th day of July 2023 by American Association of State College and Universities hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Polytechnic Institute and State University called "Virginia Tech."

WITNESSETH that the Contractor and Virginia Tech, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:


SCOPE OF CONTRACT: The Contractor shall provide Organizational Consulting Services to Virginia Tech as set forth in the Contract Documents.

PERIOD OF CONTRACT: From January 1, 2024 through December 31, 2025 with options for three (3) two (2) year renewals.

COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid by Virginia Tech in accordance with the Contract Documents.

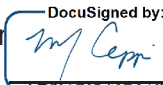
CONTRACT DOCUMENTS: The Contract Documents shall consist of this signed contract, Request for Proposal (RFP) number 5671412306 dated March 16, 2023, together with Addendum Number 1 To RFP dated March 30, 2023, Addendum Number 2 To RFP dated April 14, 2023, the proposal submitted by the Contractor dated April 24, 2023 and the negotiation summary, all of which Contract Documents are incorporated herein.

ELECTRONIC TRANSACTIONS: If this paragraph is initialed by both parties, to the fullest extent permitted by Code of Virginia, Title 59.1, Chapter 42.1, the parties do hereby expressly authorize and consent to the use of electronic signatures as an additional method of signing and/or initialing this contract and agree electronic signatures (for example, the delivery of a PDF copy of the signature of either party via facsimile or electronic mail or signing electronically by utilizing an electronic signature service) are the same as manual executed handwritten signatures for the purposes of validity, enforceability and

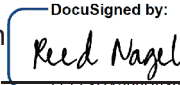
^{DS}


(Initials)

In WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

DocuSigned by:
Contr By: 

(Signature)
Matthew ceppi Executive Director

DocuSigned by:
Virgin By: 

(Signature)
Reed Nagel

Name and Title

Assistant Director of Procurement



Request for Proposal 5671412306

For

Organizational Consulting Services

March 16, 2023

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

RFP # 5671412306, Organizational Consulting Services

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until April 20, 2023 at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Angela Caldwell, Phone: (540) 231-1269 e-mail: acaldwell@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by 2:00PM on March 31, 2023. Inquiries must be submitted to the procurement officer identified in this solicitation.

PROPOSAL SUBMISSION:

Proposals may NOT be hand delivered to the Procurement Office.

Virginia Tech has partnered with Bonfire Interactive to create a new procurement portal that will allow you to access business opportunities and submit bids and proposals to Virginia Tech digitally.

Proposals must be submitted electronically at:

<https://procurement-vt.bonfirehub.com/>.

Vendors are requested to visit the new Procurement Portal then follow the link to the Bonfire vendor registration page to register your company. Registration is easy and free. If you have any challenges with the registration process, please contact Bonfire Interactive Support at support@gobonfire.com.

It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions. Log into your Bonfire Vendor account in order to access the opportunity and begin preparing your submission. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

For a quick tutorial on how to upload a submittal, visit: https://support.gobonfire.com/hc/en-us/articles/360011034814-Creating-and-Uploading-a-Submission-for-Vendors-?_qa=2.42375717.1472165071.1588110542-997330893.1585332052

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 1000MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE: _____ Date: _____

06/27/2022

[INCLUDE THIS PAGE]

I. PURPOSE:

This Request for Proposal (RFP) seeks to solicit proposals to establish a contract through competitive negotiations for Consulting Services with a specialty for Organizational Structure in Higher Education, by Virginia Polytechnic Institute and State University (Virginia Tech), an agency of the Commonwealth of Virginia.

Transformational change and organizational and operational excellence are paramount to the university's long-term success. As the university continues to move the Beyond Boundaries foundation from visioning into planning and implementation, and refreshes the strategic plan over the next year, the need for experienced firm(s) to provide a broad range of strategic consulting services remains. Through a past organizational consulting services opportunity, the university contracted with firms with a variety of expertise that enabled the university to progress strategic interests and investments.

Firms do not need to possess experience in all categories to respond but should provide an overview of capabilities in the response.

Specific project requirements will be provided by the requesting department at the time services are needed. Requests will vary based on specific department needs.

II. SMALL, WOMAN-OWNED AND MINORITY (SWAM) BUSINESS PARTICIPATION:

The mission of the Virginia Tech supplier opportunity program is to foster inclusion in the university supply chain and accelerate economic growth in our local communities through the engagement and empowerment of high quality and cost competitive small, minority-owned, women-owned, and local suppliers. Virginia Tech encourages prime suppliers, contractors, and service providers to facilitate the participation of small businesses, and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other inclusive and innovative relationships.

For more information, please visit: <https://www.sbsd.virginia.gov/>

III. CONTRACT PERIOD:

The term of this contract is for two years, or as negotiated. There will be an option for three (3) two-year renewals, or as negotiated.

IV. EVA BUSINESS-TO-GOVERNMENT ELECTRONIC PROCUREMENT SYSTEM:

The eVA Internet electronic procurement solution streamlines and automates government purchasing activities within the Commonwealth of Virginia. Virginia Tech, and other state agencies and institutions, have been directed by the Governor to maximize the use of this system in the procurement of goods and services. *We are, therefore, requesting that your firm register as a vendor within the eVA system.*

There are transaction fees involved with the use of eVA. These fees must be considered in the provision of quotes, bids and price proposals offered to Virginia Tech. Failure to register within the eVA system may result in the quote, bid or proposal from your firm being rejected and the award made to another vendor who is registered in the eVA system.

Registration in the eVA system is accomplished on-line. Your firm must provide the necessary information. Please visit the eVA website portal at <http://www.eva.virginia.gov/pages/eva-registration-buyer-vendor.htm> and **register both with eVA and Ariba**. *This process needs to be completed before Virginia Tech can issue your firm a Purchase Order or contract.* If your firm

conducts business from multiple geographic locations, please register these locations in your initial registration.

For registration and technical assistance, reference the eVA website at: <https://eva.virginia.gov/>, or call 866-289-7367 or 804-371-2525.

V. CONTRACT PARTICIPATION:



It is the intent of this solicitation and resulting contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or Virginia Tech's affiliated corporations and/or partnerships may access any resulting contract if authorized by the contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor, the resultant contract may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. The Contractor shall notify Virginia Tech in writing of any such entities accessing the contract, if requested. No modification of this contract or execution of a separate contract is required to participate. The Contractor will provide semi-annual usage reports for all entities accessing the Contract, as requested. Participating entities shall place their own orders directly with the Contractor and shall fully and independently administer their use of the contract to include contractual disputes, invoicing and payments without direct administration from Virginia Tech. Virginia Tech shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that Virginia Tech is not responsible for the acts or omissions of any entity, and will not be considered in default of the contract no matter the circumstances.

Use of this contract does not preclude any participating entity from using other contracts or competitive processes as the need may be.

VI. STATEMENT OF NEEDS/SCOPE OF WORK:

- A. To support the transformation and organizational change initiatives, the university seeks experienced firm(s) to provide a broad range of strategic consulting services. These services include, but are not limited to, organizational design and culture, business process evaluation and design (including but not limited to human resources, financial affairs, administrative operations, and academic enterprise management), change management, business analytics, process improvement, project development and management, strategic advisory services, and executive coaching.
- B. Strategic consulting service projects may be short or long term in nature, to be determined by the scope of work and project owner.
- C. It is desirable, but not required, that the strategic consulting service vendor(s) have experience in higher education and/or the public sector.

- D. Any services under the resulting contract shall be documented in a Statement of Work established between the Requestor and the Vendor when services are required.
- E. The awarded firm(s) may be required to attend meetings on campus or in other Virginia Tech locations throughout the Commonwealth of Virginia.
- F. If travel is required by the awarded firm(s), any requests for reimbursement shall be at the established GSA Travel rates for the appropriate location.

VII. PROPOSAL PREPARATION AND SUBMISSION:

A. Specific Requirements

Proposals should be as thorough and detailed as possible so that Virginia Tech may properly evaluate your capabilities to provide the required goods or services. Offerors are required to submit the following information/items as a complete proposal:

1. Vendor Profile Information

Vendor must provide the legal business name, legal status (e.g., corporation, sole proprietor, etc.) and the year the entity was organized to do business as the entity now substantially exists, the home office address, and telephone and fax numbers, web site URL (if any), and organizational chart, including the names and titles of Vendor's principal officers.

2. Vendor Organizational Capabilities

Vendor must provide a brief description of its entity (including business locations, size, areas of specialization and expertise, client base and any other pertinent information that would aid an evaluator in formulating a determination about the stability and strength of the entity), including the Vendor organization's experience and history with consulting related to development of the requirements within this proposal request. Vendor must provide curriculum vitae, resume or capabilities statement for all personnel that may be assigned to the university; this should include relevant experience and certifications.

3. Vendor Account Manager

Vendor shall appoint an Account Manager who will provide oversight of Vendor contract activities. Vendor's Account Manager will be the principal point of contact concerning Vendor's performance under this Contract. Vendor shall notify the Contract Administrator, in writing, when there is a new Vendor Account Manager assigned to this Contract. Vendors must state whether or not Subcontractors are being used and list them if so. Virginia Tech reserves the right to reject any and all Subcontractors that Vendor proposes. Any Subcontractors engaged after award of the Contract must be pre-approved in writing by Virginia Tech.

4. Client References

Vendors shall provide as references the names, addresses, telephone numbers, email addresses, and contact person for at least (3) representative customers, preferably within higher education. References must be for projects that are of a similar size and scope of the project anticipated in this RFP. References must not be from a person, company, or organization with any special interest, financial or otherwise, in the Vendor.

5. Cost Proposal

Vendor will submit cost proposal that outlines job titles and corresponding rates. Provide an overview of the methodology of providing consulting services and identify all costs

associated, broken down by activity, with providing services.

6. Demonstrate capacity and readiness to perform service and deliverables as described.
7. Participation of Small, Women-owned and Minority-owned Business (SWaM) Business:
If your business cannot be classified as SWaM, describe your plan for utilizing SWaM subcontractors if awarded a contract. Describe your ability to provide reporting on SWaM subcontracting spend when requested. If your firm or any business that you plan to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award. If your firm is currently certified, you agree to maintain your certification for the life of the contract. For assistance with SWaM certification, visit the SBSB website at <http://www.sbsd.virginia.gov/>
8. The return of the General Information Form and addenda, if any, signed and filled out as required.

B. General Requirements

1. RFP Response: In order to be considered for selection, Offerors shall submit a complete response to this RFP to include;

- i. **One (1) electronic document** in WORD format or searchable PDF of the entire proposal as one document, INCLUDING ALL ATTACHMENTS must be uploaded through the Bonfire online submission portal. Refer to page 2 for instructions.

Any proprietary information should be clearly marked in accordance with 2.d. below.

- ii. Should the proposal contain **proprietary information**, provide **one (1) redacted electronic copy** of the proposal and attachments **with proprietary portions removed or blacked out**. This redacted copy should follow the same upload procedures as described on Page 1 of this RFP. This redacted copy should be clearly marked "*Redacted Copy*" within the name of the document. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable. Virginia Tech shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

No other distribution of the proposals shall be made by the Offeror.

2. Proposal Preparation:

- a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in Virginia Tech requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by Virginia Tech at its discretion. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

- b. Proposals should be prepared simply and economically providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.
 - c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and subletter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
 - d. Ownership of all data, material and documentation originated and prepared for Virginia Tech pursuant to the RFP shall belong exclusively to Virginia Tech and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act. However, to prevent disclosure the Offeror must invoke the protections of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other materials is submitted. The written request must specifically identify the data or other materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and may result in rejection of the proposal.
3. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to Virginia Tech. This will provide an opportunity for the Offeror to clarify or elaborate on the proposal but will in no way change the original proposal. Virginia Tech will schedule the time and location of these presentations. Oral presentations are an option of Virginia Tech and may not be conducted. Therefore, proposals should be complete.

VIII. SELECTION CRITERIA AND AWARD:

A. Selection Criteria

Proposals will be evaluated by Virginia Tech using the following:

| <u>Criteria</u> | <u>Maximum Point Value</u> |
|-----------------------------------------------------------------------------------|----------------------------|
| 1. Quality of products/services offered and suitability for the intended purposes | 25 |
| 2. Qualifications and experiences of Offeror in providing the goods/services | 30 |

| | |
|---------------------------------------------------------------------|----|
| 3. Specific plans or methodology to be used to provide the Services | 10 |
| 4. Cost (or Price) | 25 |
| 5. Participation of Small, Women-Owned and Minority (SWAM) Business | 10 |

Total 100

B. Award

Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposal, including price, if so stated in the Request for Proposal. Negotiations shall then be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, Virginia Tech shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Virginia Tech may cancel this Request for Proposal or reject proposals at any time prior to an award. Should Virginia Tech determine in writing and in its sole discretion that only one offeror has made the best proposal, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of this solicitation and the Contractor's proposal as negotiated.

Virginia Tech reserves the right to award multiple contracts as a result of this solicitation.

IX. INVOICES:

Invoices for goods or services provided under any contract resulting from this solicitation shall be submitted by email to vtinvoices@vt.edu or by mail to:

Virginia Polytechnic Institute and State University (Virginia Tech)
 Accounts Payable
 North End Center, Suite 3300
 300 Turner Street NW
 Blacksburg, Virginia 24061

X. METHOD OF PAYMENT:

Virginia Tech will authorize payment to the contractor as negotiated in any resulting contract from the aforementioned Request for Proposal.

Payment can be expedited through the use of the Wells One AP Control Payment System. Virginia Tech strongly encourages participation in this program. For more information on this program please refer to Virginia Tech's Procurement website: <http://www.procurement.vt.edu/vendor/wellsone.html> or contact the procurement officer identified in the RFP.

XI. ADDENDUM:

Any **ADDENDUM** issued for this solicitation may be accessed at <http://www.apps.vpfin.vt.edu/html.docs/bids.php>. Since a paper copy of the addendum will not be mailed to you, we encourage you to check the web site regularly.

XII. COMMUNICATIONS:

Communications regarding this solicitation shall be formal from the date of issue, until either a Contractor has been selected or the Procurement Department rejects all proposals. Formal communications will be directed to the procurement officer listed on this solicitation. Informal communications, including but not limited to request for information, comments or speculations regarding this solicitation to any University employee other than a Procurement Department representative may result in the offending Offeror's proposal being rejected.

XIII. CONTROLLING VERSION OF SOLICITATION:

The posted version of the solicitation and any addenda issued by Virginia Tech Procurement Services is the mandatory controlling version of the document. Any modification of/or additions to the solicitation by the Offeror shall not modify the official version of the solicitation issued by Virginia Tech Procurement Services. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, Virginia Tech reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.

XIV. TERMS AND CONDITIONS:

This solicitation and any resulting contract/purchase order shall be governed by the attached terms and conditions, see Attachment A.

XV. CONTRACT ADMINISTRATION:

- A. Pascha Gerni, Managing Director, Business and Administration, Office of the President, at Virginia Tech or their designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance.
- B. The Contract Administrator, or their designee, shall determine the amount, quantity, acceptability, fitness of all aspects of the services and shall decide all other questions in connection with the services. The Contract Administrator, or their designee, shall not have authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Virginia Tech Procurement Department through a written amendment to the contract.

XVI. ATTACHMENTS:

Attachment A - Terms and Conditions

ATTACHMENT A
TERMS AND CONDITIONS

RFP GENERAL TERMS AND CONDITIONS

See:

https://www.procurement.vt.edu/content/dam/procurement_vt_edu/docs/terms/GTC_RFP_02182022.pdf

ADDITIONAL TERMS AND CONDITIONS

1. **ADDITIONAL GOODS AND SERVICES:** The University may acquire other goods or services that the supplier provides other than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services newly introduced during the term of the Agreement.
2. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. Virginia Tech, its authorized agents, and/or the State auditors shall have full access and the right to examine any of said materials during said period.
3. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that Virginia Tech shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
4. **CANCELLATION OF CONTRACT:** Virginia Tech reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
5. **CONTRACT DOCUMENTS:** The contract entered into by the parties shall consist of the Request for Proposal including all modifications thereof, the proposal submitted by the Contractor, the written results of negotiations, the Commonwealth Standard Contract Form, all of which shall be referred to collectively as the Contract Documents.
6. **IDENTIFICATION OF PROPOSAL EMAIL:** Virginia Tech will only be accepting electronic submission of proposals. All submissions must be submitted to <https://procurement-vt.bonfirehub.com/>. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time. **Attachments must be smaller than 1000MB in order to be received by the University.** Proposals may **NOT** be hand delivered to the Procurement Office.
7. **NOTICES:** Any notices to be given by either party to the other pursuant to any contract resulting from this solicitation shall be in writing via email.
8. **SEVERAL LIABILITY:** Virginia Tech will be severally liable to the extent of its purchases made against any contract resulting from this solicitation. Applicable entities described herein will be severally liable to the extent of their purchases made against any contract resulting from this solicitation.

- 9. CLOUD OR WEB HOSTED SOFTWARE SOLUTIONS:** For agreements involving Cloud-based Web-hosted software/applications refer to link for additional terms and conditions: http://www.ita.vt.edu/purchasing/VT_Cloud_Data_Protection_Addendum_final03102017.pdf
- 10. ADVERTISING:** In the event a contract is awarded for supplies, equipment, or services resulting from this solicitation, no indication of such sales or services to Virginia Tech will be used in product literature or advertising. The contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
- 11. CRIMINAL CONVICTION CHECKS:** All criminal conviction checks must be concluded prior to the Contractor's employees gaining access to the Virginia Tech Campus. Employees who have separated employment from Contractor shall undergo another background check prior to re-gaining access to the Virginia Tech campus. Contractor shall ensure subcontractors conduct similar background checks. Virginia Tech reserves the right to audit a contractor's background check process at any time. All employees have a duty to self-disclose any criminal conviction(s) occurring while assigned to the Virginia Tech campus. Such disclosure shall be made to Contractor, which in turn shall notify the designated Virginia Tech contract administrator within 5 days. If at any time during the term of the contract Virginia Tech discovers an employee has a conviction which raises concerns about university buildings, property, systems, or security, the contractor shall remove that employee's access to the Virginia Tech campus, unless Virginia Tech consents to such access in writing. Failure to comply with the terms of this provision may result in the termination of the contract.
- 12. INSURANCE:** By signing and submitting a Proposal/Bid under this solicitation, the offeror/bidder certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.
During the period of the contract, Virginia Tech reserves the right to require the contractor to furnish certificates of insurance for the coverage required.
- INSURANCE COVERAGES AND LIMITS REQUIRED:**
- A. Worker's Compensation - Statutory requirements and benefits.
 - B. Employers Liability - \$100,000.00
 - C. General Liability - \$2,000,000.00 combined single limit. Virginia Tech and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
 - D. Automobile Liability - \$500,000.00
 - E. Builders Risk – For all renovation and new construction projects under \$100,000 Virginia Tech will provide All Risk – Builders Risk Insurance. For all renovation contracts, and new construction from \$100,000 up to \$500,000 the contractor will be required to provide All Risk – Builders Risk Insurance in the amount of the contract and name Virginia Tech as additional insured. All insurance verifications of insurance will be through a valid insurance certificate.
 - F. The contractor agrees to be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

- 13. PRICE ESCALATION/DEESCALATION:** Price adjustments for changes in the contractor's price of materials, labor and transportation may be permitted. Request for price adjustments for any other reasons will not be granted. No price increases will be authorized for 365 calendar days after the effective date of the contract. Contractor shall give not less than 30 days advance notice prior to the annual renewal of the contract of any desired price increase.

The Contractor shall document the amount and proposed effective date of any general change in the price of materials, labor and transportation. Documentation shall be supplied with the contractor's request for increase which will (1) verify that the requested price increase is general in scope and not applicable just to Virginia Tech, and (2) verify the amount or percentage of increase which is being passed on to the contractor by the contractor's suppliers. Failure by the contractor to supply the aforementioned verification with the request for price increase will result in a delay of the effective date of such increase. The Virginia Tech Procurement Department may verify such change in price independently. The Virginia Tech Procurement Department may make such verification as it deems adequate. However, any increase which the Virginia Tech Procurement Department determines is excessive, regardless of any documentation supplied by the contractor, may be cause for cancellation of the contract by the Virginia Tech Procurement Department. The Virginia Tech Procurement Department will notify the contractor in writing of the effective date of any increase which is approved. However, the contractor shall fill all purchase orders received prior to the effective date of the price adjustments of the old contract prices.

"Across the Board" price decreases are subject to implementation at any time and shall be immediately conveyed to Virginia Tech. The contractor is further advised that price decreases which affect the price of materials, labor, and transportation are required to be passed on to Virginia Tech immediately. Failure to do so will result in action to recoup such amounts.

- 14. RENEWAL OF CONTRACT:** This contract may be renewed by Virginia Tech upon written agreement of both parties for (two years) / (with options for three (3) two-year renewals), under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration.
- 15. SIDEWALK POLICY:** Driving on sidewalks is allowed when there is no other way to get a needed vehicle to a designated place or building on campus. The vehicle operator shall be made aware that extreme caution shall be used to operate the vehicle in a way that will not be a hazard or hindrance to pedestrians using the walk. The contractor shall be responsible for any damage to turf and anything that is located adjacent to the walk. Parking an unattended vehicle on a sidewalk is strictly prohibited by State Law. The contractor is allowed to park a vehicle on a sidewalk if there is no other way to perform necessary work. The procedure to obtain a permit to operate a vehicle on sidewalks is the same as for the turf as outlined in Turf Policy. Any vehicle parked illegally on sidewalks shall be subject to ticketing, fines and towing if necessary.
- 16. TURF POLICY:** Parking or driving on campus turf or sidewalk is strictly prohibited, except as specifically directed or otherwise allowed by the Physical Plant Grounds Department. In this case, a turf permit must be obtained from Virginia Tech Parking Services and displayed by the vehicle. Turf parking is not allowed under the canopy of any tree on campus. Any vehicle parked illegally on turf or sidewalks shall be subject to ticketing and fines.

ADDENDUM # 1 TO RFP # 5671412306

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
300 Turner Street NW
Blacksburg, Virginia 24061

| DATE | DUE DATE AND HOUR |
|----------------|--------------------------|
| March 30, 2023 | April 20, 2023 at 3:00PM |

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Angela Caldwell
E-MAIL ADDRESS: acaldwell@vt.edu TELEPHONE NUMBER (540) 231-1269
FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Organizational Consulting Services

1. The following Scope of Work is being incorporated on behalf of the Diversity, Equity, Inclusion and Belonging Department.

Purpose:

Virginia Tech is seeking proposals for an experienced DEIB consultant with strong organizational development, strategic plan development, and capacity building experience to provide the University with diversity, equity, inclusion and belonging services.

All proposers must be able to provide services that encompass strong organizational development and strategic plan development.

Scope of Work:

- A. Awarded firm(s) may be asked to assess the state of diversity, equity, inclusion, and accessibility at the University. This will include a comprehensive assessment of the University's strengths, weaknesses, opportunities, and threats with respect to DEIB.
 - B. Collaborate with the requesting department to articulate a clear set of DEIB goals and draft an action plan with specific activities.
 - C. The Consultant will lay a foundation for a coordinated and comprehensive program to advance diversity, equity, inclusion and belonging (DEIB) in all departments of the University, with a focus on improving workforce diversity, creating a culture of inclusion and belonging.
 - D. The firm(s) may provide insight and knowledge on DEIB best practices with focus on higher education.
 - E. The awarded firm(s) may be asked to develop a shared language and framework including a public statement of principle regarding DEIB, that enhances the organization's ability to execute its mission, operations and strategic direction.
 - F. Develop a training strategy to increase faculty/staff DEIB competencies, skills and capacity.
 - G. Provide additional advice and support if needed. Virginia Tech may recognize that even with the DEIB plan in place there may be additional needs for the DEIB support.
2. The inquiry period is extended to **April 7, 2023 by 2:00PM.**

3. All other terms, conditions and descriptions remain the same.

4. The due date and hour remains April 20, 2023 at 3:00pm.

I acknowledge that I have read and understand this addendum in its entirety.

Signature

Date

Revised 10/19/21

ADDENDUM # 2 TO RFP # 5671412306

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
300 Turner Street NW
Blacksburg, Virginia 24061

| DATE | DUE DATE AND HOUR |
|----------------|---------------------------|
| April 14, 2023 | April 26, 2023 at 3:00 pm |

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Angela Caldwell, Buyer
E-MAIL ADDRESS: acaldwell@vt.edu TELEPHONE NUMBER (540) 231-1269
FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Organizational Consulting Services

The following questions have arisen as a result of this solicitation. Please see answers below in red:

1. Is there a page limit required for the proposal submission?

Virginia Tech answer – There is no page limit; however, proposal should be constructed in a clear and concise manner.

2. Does market research fall within the scope of strategic consulting?

Virginia Tech answer – The services sought under this contract are varying in nature and could include any number of scopes of work.

4. Can you specify the nature of the consulting services requested?

Virginia Tech answer – See response to question 2.

5. What are you trying to accomplish?

Virginia Tech answer - The objective of this solicitation is to establish a stable of contractors to provide Virginia Tech with a wide array of consulting services. The scope of works will be defined by individual users on campus.

6. What is the challenge you are looking to solve or need assistance with?

Virginia Tech answer – See response to question 5.

7. What are your expected outcomes/deliverables?

Virginia Tech answer – See response to question 5.

8. Who would be included in the executive coaching?

Virginia Tech answer - See response to question 2.

9. What is the nature of the change management you want to look at specifically? For example, changes due to expanding or contracting enrollments and at what levels (undergrad, grad), centralizing office or changing the nature of the work (from individualized to shared services)?

Virginia Tech answer - The organizational consulting services needs will vary across the enterprise, and the examples in your question are reasonable potential engagements. Additionally, services that aid in the efficiency of operations, improved use of technology, and continuous improvement are likely to be beneficial.

10. What offices do you foresee process improvements impacting (do you have a general sense)?

Virginia Tech answer - Process improvements are continuous at Virginia Tech and part of our change management mindset. Offices and units across Virginia Tech, both academic and administrative, expect to be impacted by process improvements.

11. Section 'PURPOSE' on page 3 of the RFP states the below. Can you please provide additional information on the past organizational consulting services? What services were provided, what projects were completed, and what were the results/outcomes of these projects?

- "Through a past organizational consulting services opportunity, the university contracted with firms with a variety of expertise that enabled the university to progress strategic interests and investments."

Virginia Tech answer - Organizational consulting is most recently visible in Virginia Tech's enterprise scale engagements. Please see review this [link](#) for more details.

12. For the 'SMALL, WOMAN-OWNED AND MINORITY (SWAM) BUSINESS PARTICIPATION' section on page 3 of the RFP, is there a utilization goal percentage or other goals/objectives that are required or recommended be met by the proposing vendor?

Virginia Tech answer – Virginia Tech does not have a stated goal but we encourage majority firms to utilize SWaM to the greatest extent possible.

13. For section 'CONTRACT PARTICIPATION' on page 4 of the RFP, is this section provided for informational purposes or is there information that proposing vendors have to provide in their proposals to address this section?

Virginia Tech answer – Informational purposes.

14. For section 'STATEMENT OF NEEDS/SCOPE OF WORK' on page 4 of the RFP, are there any additional strategic consulting services that Virginia Tech anticipates will be needed beyond what is listed under item A.

Virginia Tech answer – Not at this time, however the needs of the University are ever changing and the awarded contractors may be required to do additional work.

15. For section 'PROPOSAL PREPARATION AND SUBMISSION' under item Client References on page 5 of the RFP, the below language is included. Can you please clarify what the anticipated size and scope of the project(s) will be for this opportunity? This does not appear to be specified in the RFP beyond a general range of strategic consulting services requested.

- "References must be for projects that are of a similar size and scope of the project anticipated in this RFP."

Virginia Tech answer – Please include references from similar size intuitions if possible.

16. For section 'PROPOSAL PREPARATION AND SUBMISSION' under item Cost Proposal on page 5 of the RFP, is Virginia Tech just looking for hourly rates by staffing level? This section mentions request for "all costs...broken down by activity..." but anticipated projects are not specified in the RFP.

Virginia Tech answer – Please provide hourly rates.

17. For section 'PROPOSAL PREPARATION AND SUBMISSION' on page 6 of the RFP, please clarify what is meant by the below passage.

- "Demonstrate capacity and readiness to perform service and deliverables as described."

Virginia Tech answer – Explain your firms ability to meet the criteria in the statement of needs. Specifically, describe your firms ability to take on projects and estimated response time.

18. For section 'PROPOSAL PREPARATION AND SUBMISSION' on page 6 of the RFP, it mentions "the return of the General Information Form and addenda, if any, signed and filled out as required." Are the General Information Form and addenda required for the proposal? We do not see where this documentation/information is included in the RFP.

Virginia Tech answer – The General Information Form is on page 2 of the RFP. This is required to be included with your proposal signed.

19. For Attachment A Terms and Conditions on page 10 of the RFP, are vendors permitted to note proposed exceptions and/or changes to the terms and conditions in their proposal? Would doing so disqualify the vendor from the opportunity?

Virginia Tech answer – You may submit changes to the terms and conditions; however, it will be a consideration of award.

20. As projects can range in scope and duration--is the pricing schedule allowed to have wide ranges? Or are is the University expecting static pricing on each type of service?

Virginia Tech answer – You may have multiple labor categories, but we expect one rate per category.

21. While travel costs are reimbursed at federally approved levels--time spent traveling is a factor in pricing; should that be reflected in pricing schedule by providing pricing with or without travel?

Virginia Tech answer – Time spent traveling should not be included in the pricing.

22. Perhaps a bigger picture question is, whether the pricing is expected to be static once proposal is accepted?

Virginia Tech answer – Pricing should be static throughout the life of a proposed scope of work.

23. RFP says “Vendor must provide curriculum vitae, resume or capabilities statement for all personnel that may be assigned to the university; this should include relevant experience and certifications.” Does that mean vendor cannot hire or assign new personnel over the course of the contract?

Virginia Tech answer – If there is a change in personnel that provides services to Virginia Tech the contractor would be required to inform the contract administrator.

24. RFP says “Vendor will submit cost proposal that outlines job titles and corresponding rates.” But vendor may assign staff and price services based on a team structure. Is that permissible?

Virginia Tech answer – This can be discussed during negotiations.

25. The RFP says “The awarded firm(s) may be required to attend meetings on campus or in other Virginia Tech locations throughout the Commonwealth of Virginia” -- will travel requirements be set as part of the scope of work for individual projects?

Virginia Tech answer – Travel will be reimbursed by the GSA Per Diem rates.

26. Are there prioritized work streams in the areas of work noted in the RFP (e.g., organization design, business process evaluation / redesign, executive coaching) to support Beyond Boundaries initiatives and if so, what is the approximate scale and desired outcomes of these work streams?

Virginia Tech answer – There are no prioritized work streams.

27. In lieu of specific work streams with determined scale (e.g., size of function) and outcomes, should vendors prepare a “small”, “mid-sized”, and “large-scale” pricing for our methodology with associated assumptions for the cost proposal?

Virginia Tech answer – Pricing should be provided in the form of hourly rates.

28. Will task orders be issued as fixed price or other pricing structure?

Virginia Tech answer – Fixed price based on hourly rates.

29. Does Virginia Tech have an in-house organizational change management capability?

Virginia Tech answer - Yes, this is the Office of Transformation and Change.

30. As much of the analysis appears to have been done pre-COVID, is there a need to undertake updated research and/or to revalidate the future visioning done to date?

Virginia Tech answer – Virginia Tech is committed to continuous improvements and revalidating is part of that. For example, Virginia Tech is in the process of a strategic plan refresh.

32. Are there incumbent vendors? If yes, who are they and what projects have they completed?

Virginia Tech answer – Incumbent vendors: AASCU Penson, Accenture, Attain, B.Well, Deloitte, Empowering Leaders, Ernst Young, Gallup, Grant Thornton, Hawkeye, Huron, Kennedy and Company and KPMG. We do not have a list of all the projects that have been completed by these vendors due to the varying nature of these projects.

33. May we bring in our SWAM subcontractors at the time a specific SOW is issued, or are we required to name specific SWAM partners at the time of this submission?

Virginia Tech answer – If your firm would like credit for SWaM subcontracting you are required to provide the names at the time of submission.

34. Does Virginia Tech have any expectation as to when it will select the successful firm(s) for this RFP?

Virginia Tech answer – Virginia Tech hopes to have awards by January 1, 2024.

35. Does Virginia Tech have specific initiatives stemming from Beyond Boundaries and/or the strategic plan that we should be considering?

Virginia Tech answer – Student Access and Affordability and accelerating extramural research to become a Top 100 Global Research University are two specific and current initiatives shaping the Beyond Boundaries refresh. Additionally, continued growth in our health sciences initiatives and the Innovation Campus represent significant strategic opportunities.

36. Does Virginia Tech have an order of expected projects? If so, what are the subject areas and expected start date(s) for each?

Virginia Tech answer – Virginia Tech doesn't have any expected projects at this time.

37. Does Virginia Tech expect to have a primary project sponsor or steering committee to which the successful firm(s) will report? If so, who does VT expect to act in this capacity?

Virginia Tech answer – The primary project sponsor or steering committee will vary depending upon the particular engagement.

39. Are there any areas that Virginia Tech would consider out of scope for this RFP?

Virginia Tech answer – No, please provide a total capability statement with your submission.

41. If there is an incumbent, can Virginia Tech please clarify if the workforce will remain the same for the follow-on contract?

Virginia Tech answer – The incumbent vendors is listed on question 32 on this addendum. Each department that is requesting service will have a different need.

42. Is telework authorized?

Virginia Tech answer – Telework is authorized; however, the requesting department may require the awarded firm to come on campus.

43. If questions are due on 3/31, will Virginia Tech consider an extension based on Q&A response time?

Virginia Tech answer – At this time Virginia Tech will not be extending.

44. Are resumes needed for non-key personnel or part-time personnel?

Virginia Tech answer – Virginia Tech requires the resumes of any individual that will be working on this account.

45. Are letters of commitment needed for non-key personnel or part-time personnel?

Virginia Tech answer – No.

46. Are the points for the SWaM criteria all or nothing? Is there potential for partial points based on the subcontracting form?

Virginia Tech answer – Yes, depending on the amount of subcontracting.

47. Is an appendix allowed in addition to the core document for supplemental information?

Virginia Tech answer – Virginia Tech cannot tell you how to structure your proposal.

50. In reference to Addendum #1, is the intention for us to respond to DEI as an additional service, or provide a specific/executable Scope of Work for a DEI project?

Virginia Tech answer – DEIB scope of work is an additional service. The firm is not required to have DEIB certification to submit a proposal.

54. For the cost proposal outlined in Section VII. Proposal Preparation and Submission, it asks that "Vendor will submit cost proposal that outlines job titles and corresponding rates. Provide an overview of the methodology of providing consulting services and identify all costs associated, broken down by activity, with providing services." 1) Are you asking for a rate card by title that corresponds to each service requested? 2) What do you mean by costs associated by activity i.e. what constitutes an "activity"? 3) Can you provide an example of what you are expecting to see regarding cost breakdown?

Virginia Tech answer – Virginia Tech expects to see an hourly rate broken out into labor categories.

55. What needs and areas of opportunity does Virginia Tech feel are most critical, based on previous organizational consulting services provided to the university? What takeaways or lessons learned from the previous consulting partnership are top-of-mind for Virginia Tech as you seek your next partner?

Virginia Tech answer – Virginia Tech is unable to answer this question.

56. Given planned refreshes to the strategic plan over the next year:
a. Does Virginia Tech need an assessment of organizational capabilities, culture, leadership, etc. as an input to the strategic plan?

Virginia Tech answer – Virginia Tech may need assessments in these areas, but there is no current expectation for those services. This need may be identified by particular senior management areas in support of their strategic initiatives.

- b. Does Virginia Tech seek to make organizational changes prior to developing the new plan – or does the university seek to defer significant changes in structure, roles, and responsibilities until after the completion of the strategic plan?

Virginia Tech answer – Virginia Tech engages in change management and ongoing continuous improvements. The strategic plan is an active existing plan. There are no known organizational changes as part of the refresh.

- c. To what extent will the selected Organizational Consulting vendor be engaged in the development of the strategic plan, outside of these areas?

Virginia Tech answer – Virginia Tech does not have an expectation of a vendor being involved in strategic plan development at the university level. However, needs may be identified by senior leaders or mid-level managers for strategic planning support for their respective areas of the organization.

57. Is Virginia Tech open to employee listening (e.g., surveys, interviews, focus groups) as part of an engagement, or is the expectation that interactions will be the executive level only?

Virginia Tech answer – There is currently no define scope of work. Interactions could be at all levels of the University depending on the needs of each department.

58. Virginia Tech mentioned change management as one of the focus areas in the RFP. Is the university also looking for a vendor to assess and provide services around communications?

Virginia Tech answer – The objective of this solicitation is to establish a stable of contractors to provide Virginia Tech with a wide array of consulting services.

59. Does Virginia Tech anticipate the need for leadership assessment and coaching as part of the university's forthcoming work? If so, for how many executives?

Virginia Tech answer – There is no define scope of work at this time.

60. Would Virginia Tech be able to provide any guidance regarding the scope of any recent third-party support or internal initiatives that directly or indirectly relate to the statement of needs provided in the solicitation?

Virginia Tech answer – Virginia Tech cannot provide this information at this time.

61. Would the rates and terms of the contracting vehicle, if awarded, be narrowly applied to support and activities outlined in the statement of needs, or might the contracting vehicle be applied to other related work at Virginia Tech, such as technology implementations?

Virginia Tech answer – See terms and condition number one, additional goods and service clause.

62. It is our understanding that the current RFP (RFP Number 5671412306), is a rebid of an earlier contract from 2018 (RFP Number 0058065). We have several questions about the previous contract based on RFP Number 0058065:

a. How many projects were conducted through the contract associated with RFP Number 0058065?

Virginia Tech answer – This information would take weeks to obtain holding up the process of this RFP.

b. What is the total dollar value of the projects conducted through the contract associated with RFP Number 0058065?

Virginia Tech answer – \$3,908,607.71

c. Please provide a list of the types of projects (i.e., the nature of the work) conducted through the contract associated with RFP Number 0058065?

Virginia Tech answer – The scope of works varies greatly from department to department.

63. How many respondents will be selected through this RFP?

Virginia Tech answer – Virginia Tech will award as many contracts as necessary to fulfill our organizational consulting needs.

64. Is there a minimum points threshold that vendors must meet to be selected?

Virginia Tech answer – No.

67. Addendum #1 includes a Scope of Work that is being incorporated on behalf of the Diversity, Equity, Inclusion and Belonging (DEIB) Department. Are items A-G in Addendum #1 replacing items A-F in Section VI. STATEMENT OF NEEDS/SCOPE OF WORK in the RFP? Or is the Scope of Work in Addendum #1 intended to be in addition to Section VI items A-F in the RFP?

Virginia Tech answer – DEIB is not replacing the SOW A-F it is in addition too.

68. If Addendum #1 is in addition to the scope outlined in the RFP, can vendors who do not provide DEIB consulting services bid on the services outlined in items A-F of Section VI. STATEMENT OF NEEDS/SCOPE OF WORK in the RFP document?

Virginia Tech answer – Yes, vendors that do not provide DEIB services can submit a proposal.

69. What is the nature of work that falls into "strategic advisory services" noted section VI, paragraph A of the RFP document?

Virginia Tech answer – The needs of the University is to have a stable of contractors to provide Virginia Tech with a wide array of consulting services.

71. If a vendor does not submit a response to a particular category of work listed in the RFP, does that preclude that vendor from bidding on future task orders / projects in that category of work?

Virginia Tech answer – No.

72. Should the Addendum #1 for DEIB be incorporated as part of the consolidated response to the RFP vs an addendum or separate submission?

Virginia Tech answer – Please incorporate the DEIB scope of work into your submission.

73. Which are the requesting departments who would need to articulate their DEIB goals? Can we get a list or an understanding of the number and size of these departments, for pricing.

Virginia Tech answer – The goal is to provide this service to the campus as a whole.

74. What would be the nature of additional advise and support needed, once DEIB plans are in place?

Virginia Tech answer – The goal is to be able to call upon a stable of firms as needed for a variety of services.

75. Please expand on what is implied by 'Capacity Building Experience' of the consultant. Is there an expectation for the consulting firm to provide DE&I training as a service?

Virginia Tech answer – Selected contractors may be required to perform DEIB training as requested by departments.

76. Please describe the scope and work to date regarding DEIB at Virginia Tech beyond what it publicly available on your Inclusion & Diversity and Inclusive Virginia Tech website? Sub questions include:

- a. Is Virginia Tech looking at DEIB across its entire ecosystem – faculty, staff, students, external partners, and vendors?

Virginia Tech answer – The scope of engagements will vary enterprise wide as within each department, and potentially include all of the above.

- b. Global focus (given Beyond Boundaries vision) or North America?

Virginia Tech answer – The focus could be global or unit specific work.

- c. What work has Virginia Tech already done regarding DEIB – for example, recent current state assessment or refreshed strategy?

Virginia Tech answer – Please see these links for [DEIB efforts](#).

77. Section I of the RFP, "Purpose," on page 3, references Virginia Tech's plan to refresh its strategic plan over the next year. Does Virginia Tech anticipate engaging a consulting firm by means of this RFP to directly support and facilitate the University's strategic planning process over the next year?

Virginia Tech answer – Virginia Tech does not have an expectation of a firm being involved in strategic plan development at the university level.

80. Section VII.A.7 on page 6 of the RFP indicates that if a business the vendor plans "to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award."

- Does "the time of the award" refer to the awarding of a contract for a future specific project from a requesting department at Virginia Tech, does it refer to the selection of vendors in response to this blanket RFP?

Virginia Tech answer – The Contractor shall be SWaM certified when contractor is selected to be awarded a contract, not a future specific project.

82. With regard to Addendum One:

- a. Does this scope of work pertain to all staff, faculty and students?

Virginia Tech answer- The Scope of work can be varying by each department.

b. How does VA Tech define “DEIB”?

Virginia Tech answer - Diversity: The visible and invisible characteristics and experiences that make people different. Everyone is diverse. Equity: Identifying and addressing imbalances and barriers that inhibit group and individual full engagement and success. Inclusion: The act of ensuring all groups and individuals have equitable access to resources and opportunities. Developing an understanding of unique needs and challenges are critical. Belonging: The nexus of diversity, equity and inclusion where all groups and individuals feel welcomed, valued, and are empowered to be active members in the community.

d. Does VA Tech have a current DEIB strategy in place, and has the university done any surveys or fact-finding on DEIB previously?

Virginia Tech answer – Virginia Tech has a strategy in place; however, Virginia Tech is always looking to approve our DEIB commitment. This is why we are looking for a stable of contractors that provide these services.

e. What, existing DEIB data does the University hold? E.g., is there an existing HR census with demographic data.

Virginia Tech answer – Procurement does not have access to this information and releasing it would require the University legal involvement.

83. If there are any parts of this RFP that a vendor cannot support, can the vendor still respond to the proposal?

Virginia Tech answer – Yes.

84. The guidelines state “identify all costs associated, broken down by activity, with providing services.” To what level of detail should these activities and costs be broken down in the proposal?

Virginia Tech answer - Virginia Tech encourages proposers to be as detailed as possible by the types of services your organization provides. For example, if you have consulting labor costs by hour and title/role we would anticipate seeing this detail.

85. Should this addendum be interpreted as an extension of the RFP scope or a task order?

Virginia Tech answer – Addendum number one was included to be an addition to the scope of work in the original RFP.

88. RFP section VII.A.2 requests that “vendor must provide curriculum vitae, resume or capabilities statement for all personnel that may be assigned to the university; this should include relevant experience and certifications”. Can Virginia Tech confirm that is it acceptable for vendors to provide curriculum vitae, resume or capabilities statement for all personnel within an appendix section?

Virginia Tech answer – Virginia Tech cannot tell you how to structure your proposal.

89. Can Virginia Tech make the following revisions in quotations to Section 12 (Default) in the RFP Terms and Conditions? “In case of failure to deliver goods or services in accordance with the contract terms and conditions, Virginia Tech, after due oral or written notice and offering the Contractor a minimum of seven (7) business days to cure such failure, may procure them from other sources and hold the Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which Virginia Tech may have.”

The Contractor feels it fair and reasonable to establish a defined minimum cure period to correct any failures in the unlikely event of contract default. In doing so, cure periods have historically promoted economic efficiency by leveraging the resources already mobilized on the engagement that possess the historical knowledge and understanding to cure any deficiencies more quickly and efficiently.

Virginia Tech answer – Any revisions to Virginia Tech’s terms and conditions will result in a legal review.

90. Can Virginia Tech make the following revisions in quotations to Section 19 (Indemnification) in the RFP Terms and Conditions? “Contractor agrees to indemnify, defend and hold harmless Virginia Tech and the Commonwealth of

Virginia and their officers, agents, and employees (the "Indemnitees") from any third-party claims, damages and actions of any kind or nature whether at law or in equity, arising from or caused by the ~~use of any materials, goods, or equipment of any kind or nature, furnished by the contractor's negligent performance of this contract/any services of any kind or nature furnished by the contractor,~~ provided that such liability is not attributable to the sole negligence of Virginia Tech ~~or failure of Virginia Tech to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.~~ Except for the Contractor's gross negligence or willful misconduct, the Contractor's liability to the Indemnitees related to this contract is limited to no more than the total amount of fees paid to the contractor by Virginia Tech under this contract. Neither party will be liable for any lost profits or other indirect, consequential, incidental, punitive or special damages."

Virginia Tech answer – Any revisions to Virginia Tech's terms and conditions will result in a legal review.

- 91. All other terms, conditions and descriptions remain the same.
- 92. The due date and hour is changed from April 20, 2023 at 3 pm TO **April 26, 2023 at 3 pm.**

I acknowledge that I have read and understand this addendum in its entirety.

Signature

Date



Virginia Tech
Organizational Consulting Services

RFP: 5671412306

April 24, 2023

We consult and advise university leaders to help their institutions *thrive*.

AASCU CONSULTING
1717 Rhode Island Avenue NW, Suite 700
Washington D.C. 20036
aascu.consulting@aascu.org



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1. Vendor Profile Information

AASCU Consulting was established in 2014 by the American Association of State Colleges and Universities (AASCU) to support institutional leaders in managing the broad range of strategic and organizational challenges and promises of American higher education. AASCU Consulting builds on the tradition of Penson Associates Inc., founded more than 40 years ago.

AASCU Consulting is led by Dr. Matt Ceppi, Executive Director. AASCU is led by Dr. Mildred García, President. AASCU Chief Financial Officer is Ms. Jean Cibuzar. Chair of the Board is Dr. Heidi Anderson.

Legal Status

AASCU Consulting is part of the American Association for State Colleges and Universities, a 501(c)(3) corporation, headquartered at 1717 Rhode Island Avenue NW, Suite 700, Washington D.C. 20036. (202) 478-4663. Fax (202) 296-5819. www.aascuconsulting.org

2. Vendor Organizational Capabilities

One of higher education's most credible research and consultation firms, AASCU Consulting is known and admired for the experience and competence of its consultants, the quality of its services to its many clients and the integrity of its work. Through decades of experience, AASCU Consulting has developed consistently proven methodologies for strategy and transformation, organizational redesign, change leadership, and leadership assessment, coaching and development.

The primary purpose of the firm is to work with colleges and universities – boards, presidents, provosts, and academic and administrative leadership, faculty, and others – on strategy, organizational transformation, leadership effectiveness, and building institutional capacity. We accomplish this through:

- Organizational Assessment & Redesign including at the institutional level, academic organization, human resources, institutional advancement, student services (e.g. advising), and student affairs.
- Executive Coaching and 360 Assessment
- Onboarding New Leaders
- Leadership Team Development
- Change Leadership
- Strategic Planning & Execution
- Financial & Operational Effectiveness
- Business Process Redesign

AASCU Consulting includes 19 senior consultants, 9 consultants, and 1 executive director - all successful administrators and former presidents – whose wide range of experience collectively touches on all aspects of academia and the higher education enterprise. Consultants routinely draw upon one another's expertise to serve the needs of our clients.

What makes us different

Some additional distinctive qualifications AASCU Consulting brings to your engagement include:

Experience. AASCU Consulting's team members are effective, experienced former presidents, chancellors, and other senior executives of colleges and universities. We have diverse backgrounds in higher education and professional services, giving us the ability to develop creative, individualized solutions for your institution.



Excellence. We've dedicated our careers to making colleges and universities better and want to help others do the same. We have proven track records of success in our own careers and are actively engaged in the advancement of higher education.

Integrity. AASCU's member colleges, universities, and systems share a learning- and teaching-centered culture, a historic commitment to underserved student populations, and a dedication to research and creativity. We share that commitment to advancing economic progress and cultural development in local communities.

STATEMENT OF NEEDS / SCOPE OF WORK

A. In specific response to the "Statement of Needs", AASCU Consulting would tailor our services to meet Virginia Tech's unique needs and priorities designed to transform the university achieving greater institutional excellence. Our practices and services can meet Virginia Tech's needs in these areas identified in the RFP:

- Organizational Design and Culture
- Business Process Evaluation and Design
- Change Management
- Strategic Advisory Services
- Executive Coaching

With the guidance of AASCU Consulting, our executive Cabinet has increasingly experienced positive results and grown closer as a team... I know I have personally benefitted from the insight and constructive direction that a skilled, outside observer can offer; and I strongly believe my executive cabinet has benefitted from the expertise and professional acumen and assessment AASCU Consulting has shared with us each year.

Jeffrey D. Armstrong

President, California Polytechnic State University San Luis Obispo

Specifically, our services include:

Organizational Assessment & Transformation, including at the institutional level, academic organization, human resources, institutional advancement, and student affairs.

College and university leaders seek to assess their institutional structure to create an organization that is better aligned to achieve its strategic priorities and more agile to respond to the changing higher education landscape, opportunities to educate new learner demographics, partner with industry and community, or provide inclusive and equitable experiences, to name a few. AASCU Consulting also can review the structures, resources, processes, and practices in human resources, student services, or advancement to assess structure, practices, and processes to evaluate how they are working to meet the needs.

AASCU Consulting can assess:

- Role and portfolio clarity in the organization and strategic alignment on the priorities and aspirations of the institution.
- Alignment with core mission and agility to respond to the changing and future dynamics of the institution's region, student demographics, industry, and the higher education landscape.
- Reflection of best industry practices for a modern institution of higher education.



- We use this assessment to identify opportunities for improvement, compare against comparable institutions, aspirational institutions, and best industry practices, recommend potential options, and create a roadmap to solutions.

Executive Coaching and 360 Assessment.

We believe even the most experienced leaders can benefit from professional development and coaching to enhance communication skills, improve performance, and boost confidence. AASCU Consulting has developed a consistently proven methodology and proprietary tools for meaningful and practical leadership assessment and development.

Our professional development work has common elements to the work of a particular position (e.g., academic dean) but is also tailored to the level of experience of the individual, as well as their likely next professional career interests.

Our coaching engagements begin with an assessment of the individual's leadership and management strengths and weaknesses and to understand the scope of responsibilities and success metrics for the position.

Leadership Competencies

AASCU Consulting has a library of self-assessments, leadership competency models and skill clusters appropriate to the position, which can be tailored to align with the leadership expectations or established competency models at Virginia Tech (e.g. VT Leading at Every Level Model); or we can use our library and expertise to help Virginia Tech create a leadership competency model that reflects a modern R1 institution. That competency model can then be used to onboard new leaders, assess leadership skills, and identify areas for development.

Coaching

We conduct periodic 1:1 sessions focused on the nature of the role of the individual (e.g. deanship), shaping the leadership team and organization, setting a clear set of strategic and operational priorities, as well as a focus on the rhetorical tools and necessities of leadership. Consultants can then conduct formal ongoing sessions with the individual to continue the work on the areas of leadership detailed in the professional development plan.

Thought Partnership

AASCU Consulting provides a seasoned individual from outside the institution with whom the executive can have timely, useful, and confidential conversations.

Assessment

AASCU Consulting uses a variety of assessments appropriate to the role and engagement. Our assessments include:

- **Mini360.** AASCU Consulting conducts a "light 360 review" towards the conclusion of a coaching engagement, which will involve the individual asking up to 9 colleagues and their supervisor to answer questions regarding how they perceive the individual's leadership. The comments will be confidentially sent to the coach who will organize and analyze the comments into a summary report. The report will assist in guiding the last sessions.
- **Comprehensive Assessment (Presidents, Provosts, Vice Presidents, Deans).** The AASCU Consulting model for presidential and executive evaluation has been used for over forty years. It has proven invaluable to presidents, boards, and other senior executives interested in improving leadership and institutional performance. The model consists of three main components. First, information gathering from a wide



variety of sources and stakeholders. Second, in-depth interviews with key individuals and focus groups with key stakeholders selected at random where possible. Finally, a detailed written report with findings and recommendations. It can also include a survey that is based on established competencies and principles of Virginia Tech or the AASCU Consulting leadership skill clusters. We tailor the process to align with the institution's policy or any established procedures for executive review.

- Individual 360 – these are for the sole purpose of professional development and growth and use industry best practice 360 instruments that can be aligned with leadership competencies of the institution. Results are only shared with the coach and individual.

Onboarding New Leaders.

AASCU Consulting has helped onboard hundreds of new presidents, provosts, vice presidents, deans, and other campus leaders to accelerate their transition and success. The first few months of a leadership transition are critical. The investment in the transition and onboarding for new leaders, a fraction of the costs of search fees and salary, has consistently demonstrated its value. The average amount of time to reach full potential can be reduced by as much as a third with effective integration and support of new leaders. AASCU Consulting has a reputation for its strong success rate for accelerating new leaders, reducing the time to have a full impact in a new role, and long-term retention or promotion.

"This was my first experience with AASCU Consulting. The consultant's knowledge and background provided confidence and credibility that made a unique difference with our faculty and staff community given the scope of the work. I recommend new presidents and chancellors leverage the assets and expertise of AASCU Consulting. The level of experience and relatedness can help tremendously as they launch their leadership role."

Bennie Harris

Chancellor, University of South Carolina Upstate

Our onboarding (or re-onboarding) services include the *Dean Accelerator*, *President Accelerator*, and *New Leader Accelerator*. These offerings are an intentional, structured, and individualized approach to develop skills and capacities for effectiveness in the role and can include:

- Orientation to the work of a dean, for instance, and the larger context of university administrative functions and responsibilities
- Navigating internal networks and organizational and team dynamics
- Shaping the leadership team and organization
- Setting clear strategic and operational priorities
- Rhetorical tools and necessities of leadership
- Facilitated retreat with the leadership team
- Ongoing thought partnership and support through the first six to twelve months



Team Development.

Workshop

AASCU Consulting can conduct a team assessment and plan and deliver a team development workshop. The workshop examines team dynamics and culture and provides tangible tools to be used for effective leadership and operations including principles to embrace, team commitments, empowering agility and decision making, and team communication.

Retreat Facilitation

AASCU Consulting frequently facilitates 1 - 1.5 days of leadership and team development retreats with the leadership teams at the cabinet, division or college levels. The agenda and topics for the retreat will be based on the interviews of the leadership team and conversations with the senior leader on the issues and challenges facing the university, division or college.

Team Assessment

The AASCU Consulting Leadership Team Assessment provides an understanding and analysis of the portfolios, competencies, and effectiveness of individuals on the team through a structured process. For example, a senior leadership team assessment is outlined below:

- Review of portfolios and organizations.
- Exercise to understand the vice president's perspective of "what is on their plate", where they generally spend their time, what their priorities are, how they align with the institutional and president's priorities, and their progress toward them or what has hindered progress.
- The vice president and the consultant will together engage in an assessment of their leadership skills and behaviors using a microframework for leadership self-assessment.
- Optional: AASCU Consulting can conduct a 360 assessment of the vice presidents, which asks others to answer questions on how they perceive the respective vice president's leadership.

Change Leadership.

Virginia Tech is looking ahead to the future from a position of strength in the higher education landscape, but it recognizes the opportunities and need for agility and continued innovation to remain competitive, sustain its success, and fulfill its historic mission. AASCU Consulting can engage leadership teams to position the team and the University to leverage the opportunities before it, to be agile in adapting to the changing environment for higher education and how we work, and advance execution on its bold, transformational strategic plan. We engage in thoughtful conversations and group exercises to answer important questions for facilitating change. A few examples include:

- What is the change vision? Where should sense of urgency be placed in the strategic plan, in the next fiscal year, in the leadership team's decision making?
- What does the leader need from their leadership team to foster change and make strategic decisions? What does the team need from them?
- What is the university locus of decision making? Does it facilitate or inhibit change? Does it empower the people who are best positioned to drive change? Do they have the right information to make decisions? What do they need from their respective leader to make strategic decisions?



- What behaviors, habits and/or practices do we need to stop, start, or accelerate to foster agility and turn strategy into results?

Strategic Planning & Execution.

With the University's bold vision underway, AASCU Consulting can help turn strategy into results by:

- Executing on your plan, fostering real-time strategic decision making, and implement a process that consistently assesses new initiatives, risks, and alternatives against the institution's priorities.
 - Identify milestones, targets and metrics to assess progress, regularly calibrate the strategic plan, and focus the university community on closing specific gaps in the strategic areas.
 - Develop or refine strategic plans that communicate a compelling vision and provide strategic guiderails to focus the institution, division, college, or unit actions and reach full potential.
- B. AASCU Consulting's approach to providing premier consulting services is to commit to the university for the long term while customizing specific efforts as requested by the university. Each request for consultation will initiate a discussion between AASCU Consulting and VT to determine the nature of the work, the deliverables, and the estimated time of engagement. Once agreement is reached, the engagement will be memorialized in a Letter of Agreement.
- C. AASCU Consulting has served over **475 institutions of higher education**, including state universities and colleges, private non-profit colleges and universities, systems of higher education, and international partners. Almost all its work is with public institutions, including many polytechnic universities and institutions with high research activity.
- D. AASCU Consulting is particularly suited to create a customized Statement of Work that thoughtfully meets VT's needs and interests. All services are defined in detail through a consultation process with the client and documented in a Statement of Work included in a Letter of Agreement. We tailor our services and solutions to the unique needs, culture, and challenges identified. We listen closely to your issues and concerns, then deliver a documented Statement of Work outlining our approaches, agreed upon deliverables, and timeline.
- E. AASCU Consulting acknowledges that consultants may be required to attend meetings on campus or in other Virginia Tech locations throughout the Commonwealth of Virginia. AASCU Consulting consultants frequently travel to client locations throughout the country and adhere to all policies for vendors and visitors to campus.
- F. AASCU Consulting acknowledges that any travel reimbursement will be at the established GSA Travel rate, which is in line with its own travel policy.



3. Vendor Account Manager

Matt Ceppi, Executive Director, will be the principal point of contact concerning AASCU Consulting's performance under this contract.

Contact Info: Matt Ceppi
Executive Director, AASCU Consulting
ceppim@aascu.org
O. (202) 478-4663
M. [REDACTED]

Notification of any change to Vendor Account Manager will be made to the Contract Administrator in writing. AASCU Consulting does not use sub-contractors.



4. Client References

California Polytechnic State University

| | |
|---------------|------------|
| Contact Name: | [REDACTED] |
| Phone Number: | [REDACTED] |
| Email: | [REDACTED] |

Sam Houston State University

| | |
|---------------|------------|
| Contact Name: | [REDACTED] |
| Phone Number: | [REDACTED] |
| Email: | [REDACTED] |

Weber State University

| | |
|---------------|------------|
| Contact Name: | [REDACTED] |
| Phone Number: | [REDACTED] |
| Email: | [REDACTED] |

"I strongly believe that the institutional momentum gained during the first year of my presidency was due in no small part to the onboarding services provided by AASCU Consulting.

AASCU Consulting's work helped accelerate my knowledge of the college's senior leadership team and its culture, its organizational structures, the complex ecosystem in which it operates, the most immediate challenges, and promising opportunities it faced. The knowledge gained informed my allocation of time and energy during the first three months of my tenure and sharpened my focus on the important areas that needed attention."

José Luis Cruz Rivera
President, Northern Arizona University



5. Cost Proposal

Recognizing the benefits of an established contract, AASCU Consulting is offering discounted rates to Virginia Tech University, which represent a significant discount on our standard rate and a discount on our member rate. We also recognize and appreciate Virginia Tech's leadership in this area and that, through VASCUPP, Virginia Tech is facilitating access to quality advisory services for other public higher education institutions.

| Phase | Hourly Rate |
|-------------------|-------------|
| Senior Consultant | \$375 |
| Consultant | \$300 |
| Specialist | \$200 |
| Total | |

We will be available for routine questions and brief consultations at no additional charge, a welcome investment in your success.

Fees do not include travel and direct expenses. AASCU Consulting acknowledges that any travel reimbursement will be at the established GSA Travel rate.



6. Capacity and Readiness

Our consultants draw from their diverse experiences to serve and strengthen higher education. All Senior Consultants are former Chancellors or Presidents, and some have served as public university system heads. Most have served as chief academic officers, chief financial officers, academic deans, department heads, and student affairs officers or advancement officers. In addition to our senior consultants, AASCU Consulting includes several consultants and specialists who are former provosts, vice presidents of finance or student affairs, chief development officers, vice chancellors of human resources, and academic deans who have extensive experience in specific areas of higher education. Team profiles are included in the appendices.

7. SWAM Business Participation

AASCU Consulting is a division of The American Association of State Colleges and Universities (AASCU), a non-profit 501c3 corporation.



8. General Information Form

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until April 20, 2023 at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Angela Caldwell, Phone: (540) 231-1269 e-mail: acaldwell@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by 2:00PM on March 31, 2023. Inquiries must be submitted to the procurement officer identified in this solicitation.

PROPOSAL SUBMISSION:

Proposals may NOT be hand delivered to the Procurement Office.

Virginia Tech has partnered with Bonfire Interactive to create a new procurement portal that will allow you to access business opportunities and submit bids and proposals to Virginia Tech digitally.

Proposals must be submitted electronically at:

<https://procurement-vt.bonfirehub.com/>.

Vendors are requested to visit the new Procurement Portal then follow the link to the Bonfire vendor registration page to register your company. Registration is easy and free. If you have any challenges with the registration process, please contact Bonfire Interactive Support at support@gobonfire.com.


It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions. Log into your Bonfire Vendor account in order to access the opportunity and begin preparing your submission. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

For a quick tutorial on how to upload a submittal, visit: https://support.gobonfire.com/hc/en-us/articles/360011034814-Creating-and-Uploading-a-Submission-for-Vendors-?_ga=2.42375717.1472165071.1588110542-997330893.1585332052

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 1000MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE:  Date: 04/18/2023

[INCLUDE THIS PAGE]

06/27/2022



Profiles

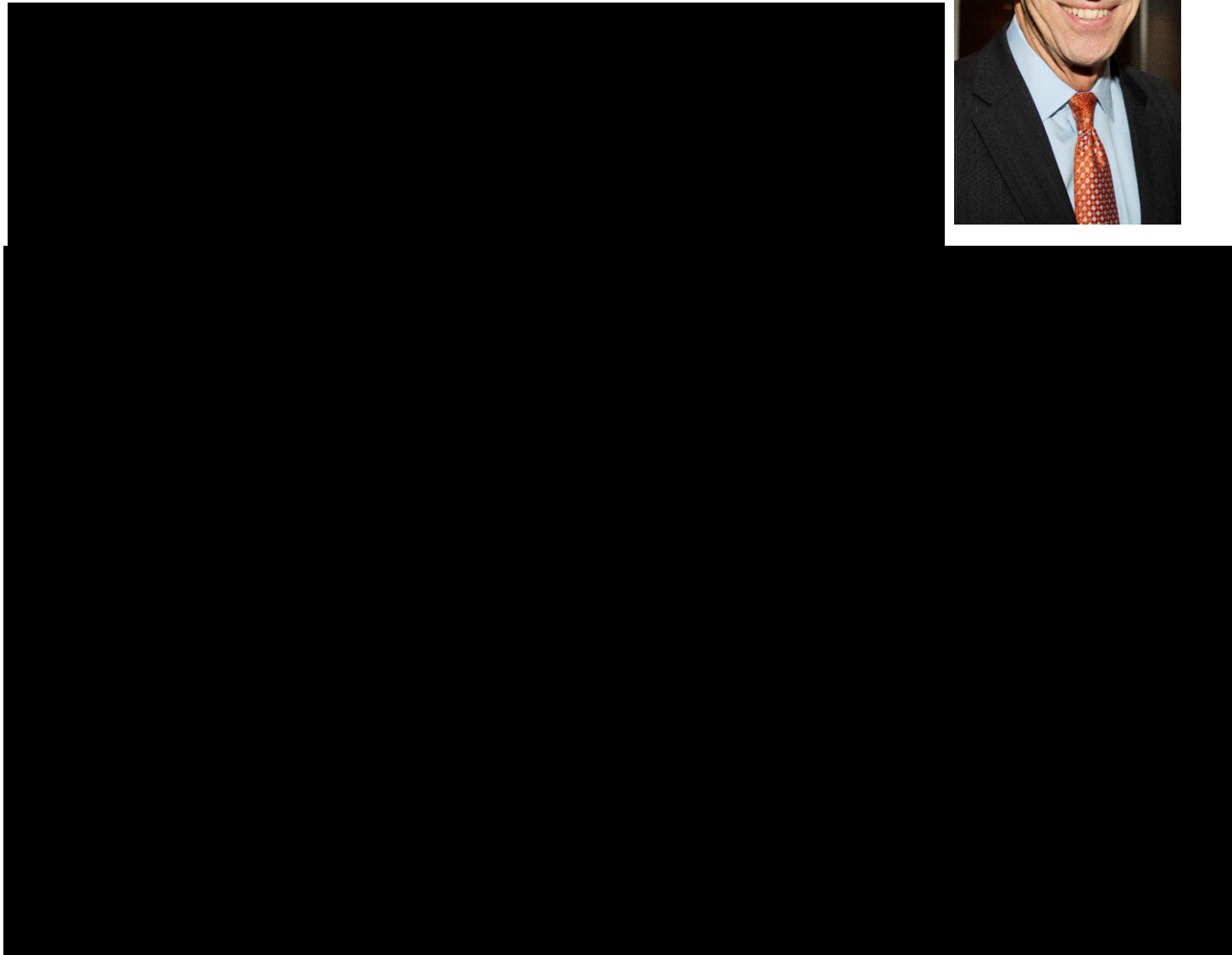
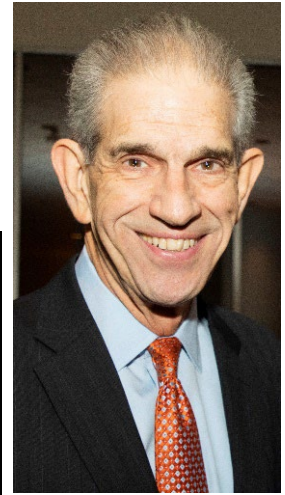


James Spaniolo, J.D.

AASCU Consulting

Senior Consultant

Profile

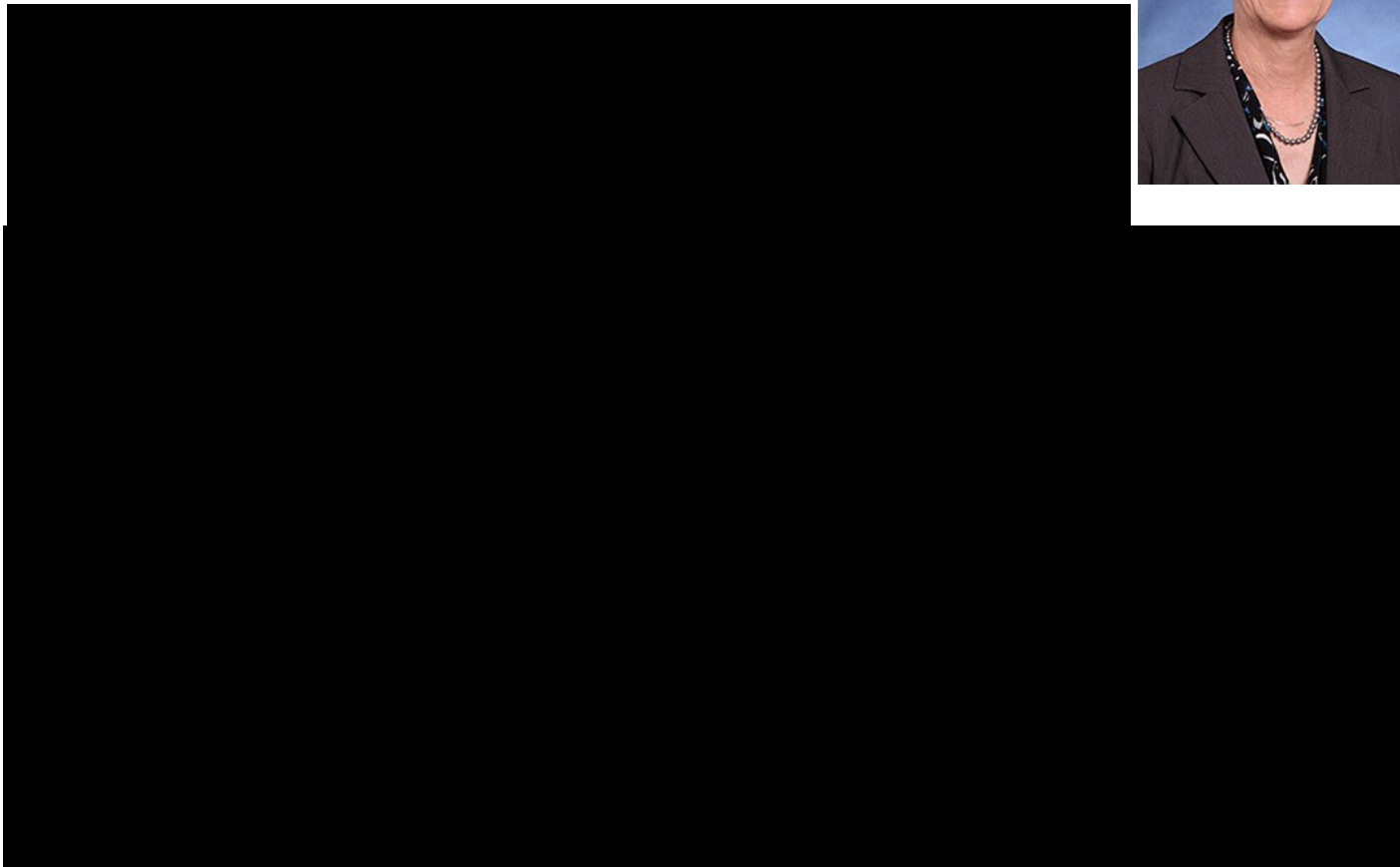


Dorothy Leland, Ph.D.

AASCU Consulting

Senior Consultant

Profile



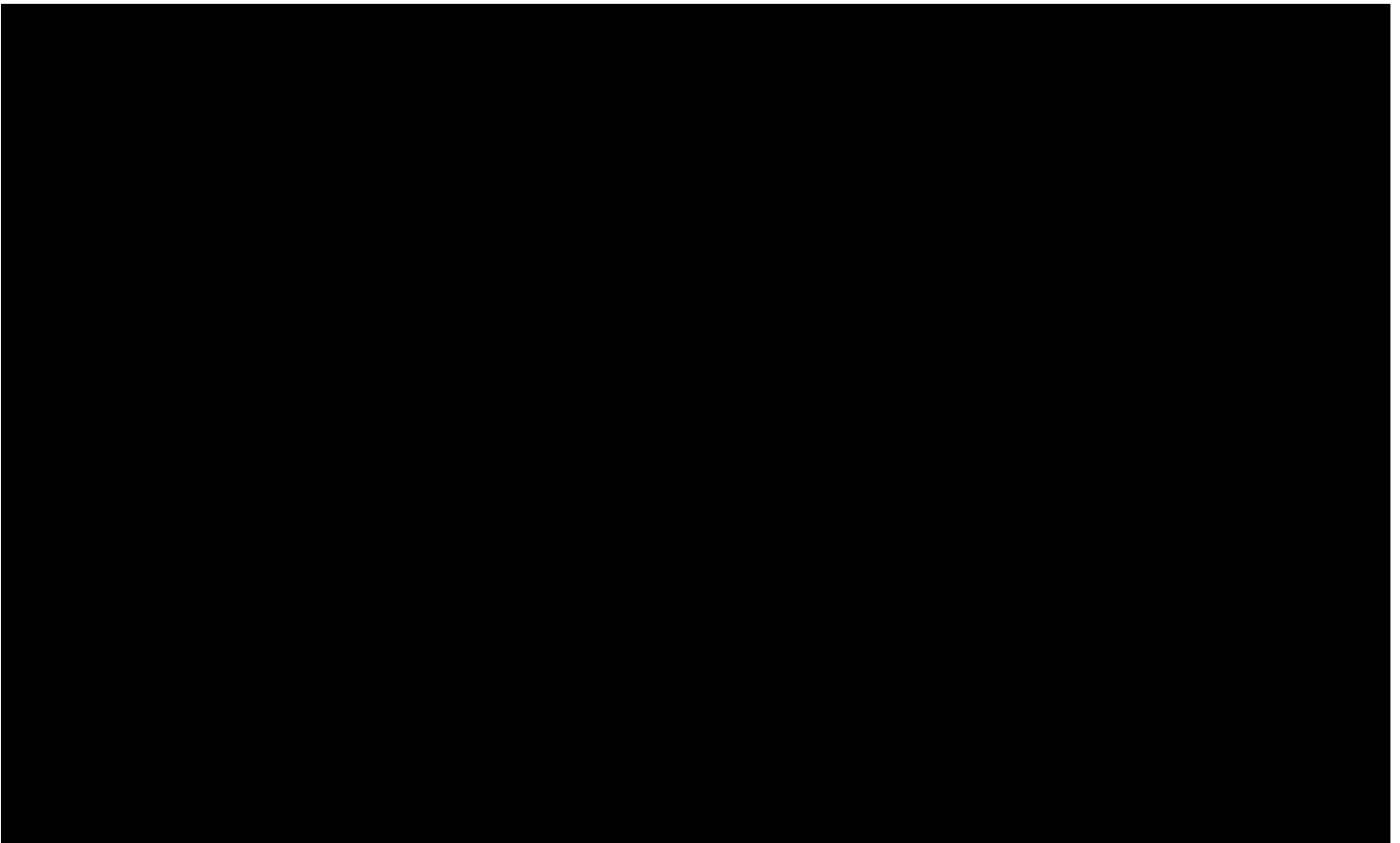
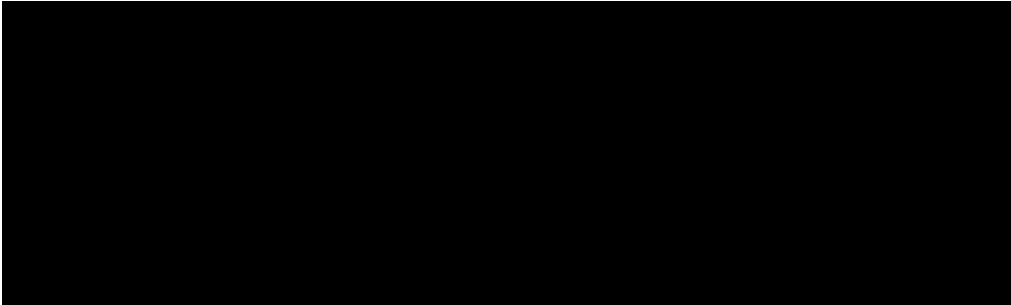


Dr. Steve M. Dorman, Ph.D.

AASCU Consulting

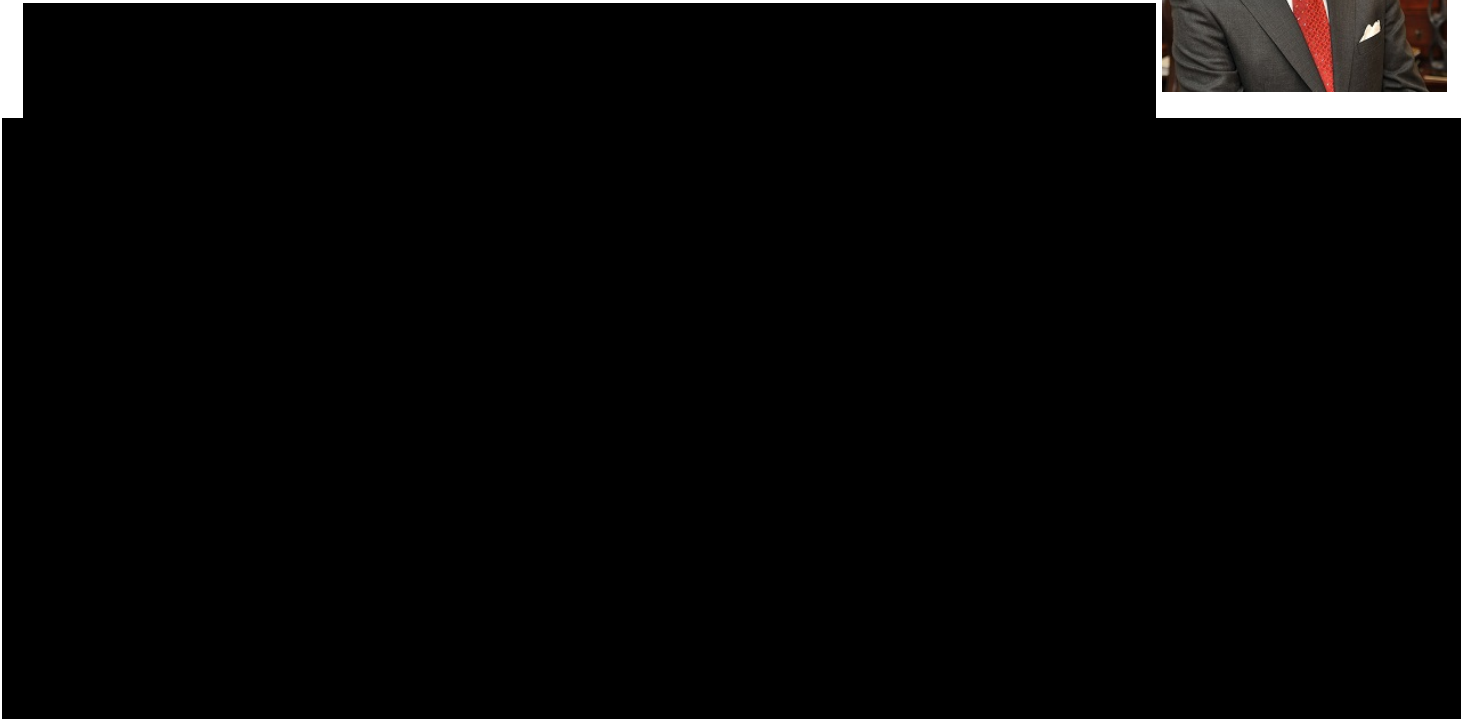
Consultant

Profile



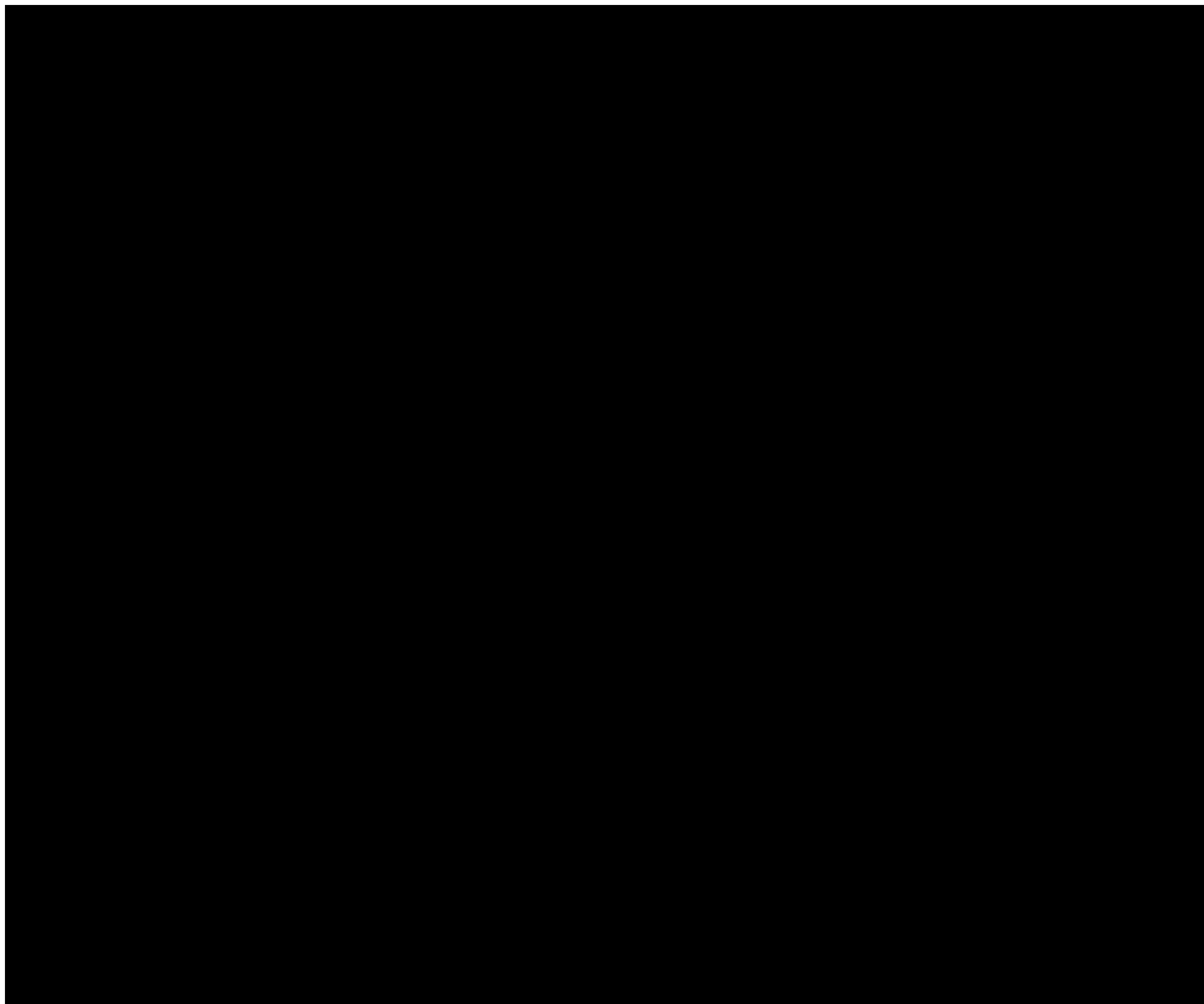
Mickey Burnim, Ph.D.
AASCU Consulting
Senior Consultant

Profile





Lori Lamb, J.D.
AASCU Consulting
Senior Consultant

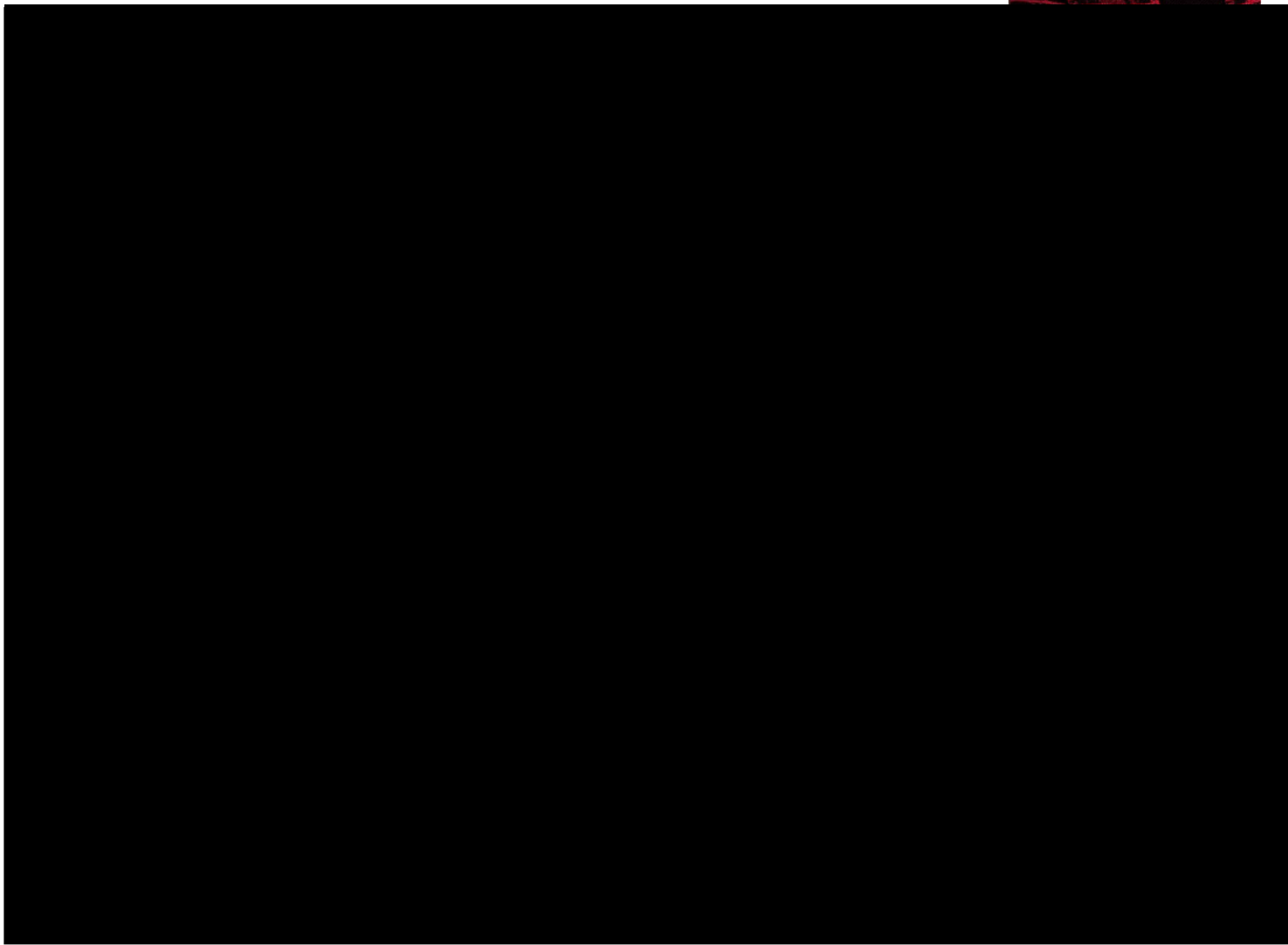
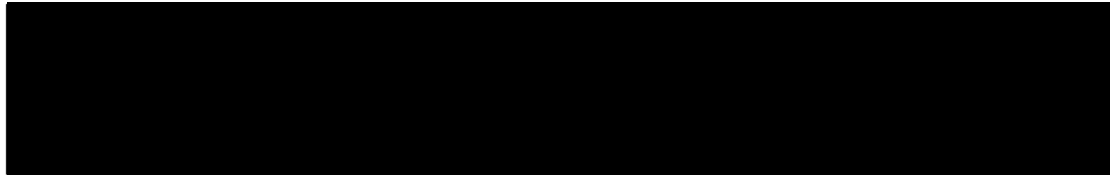


Michelle Behr, Ph.D.

AASCU Consulting

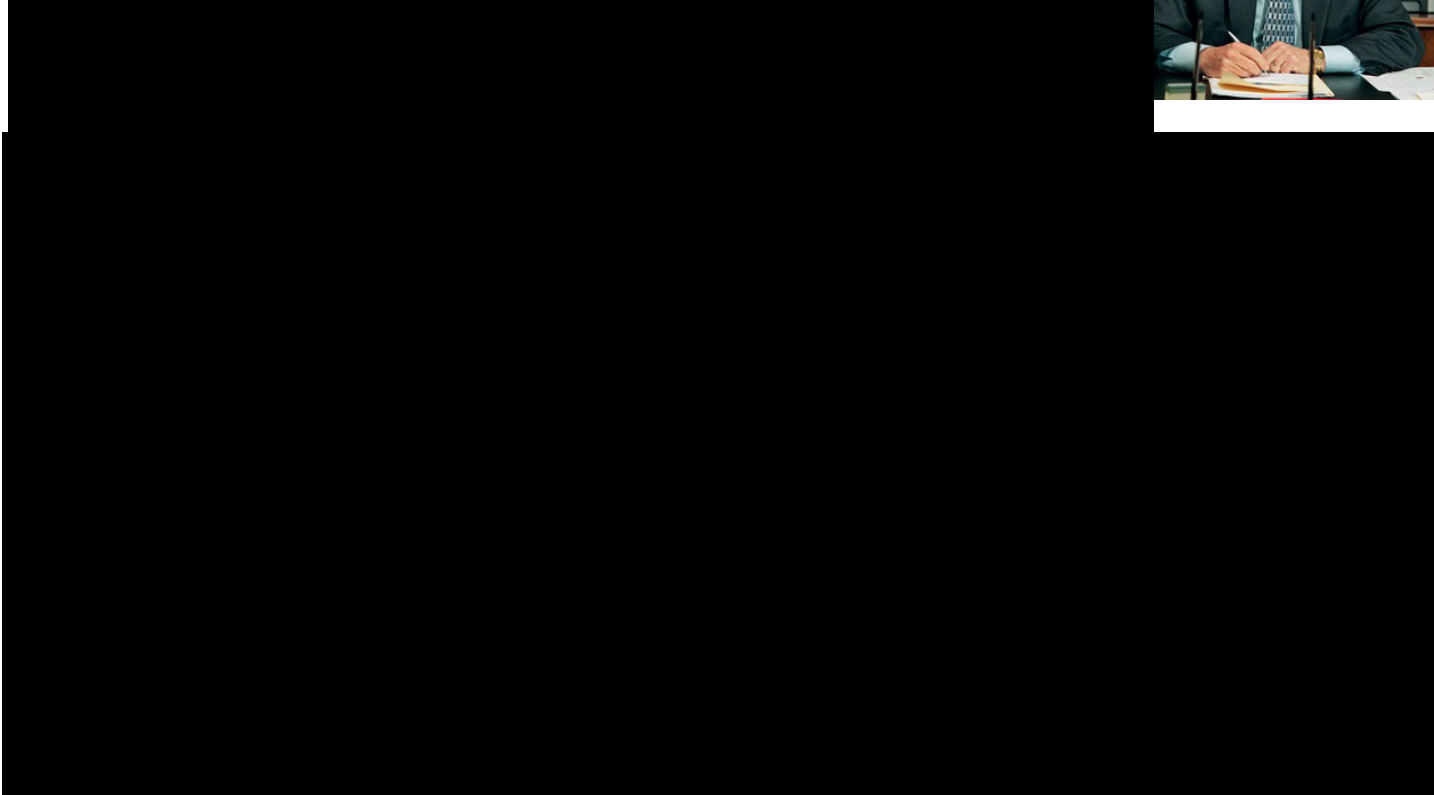
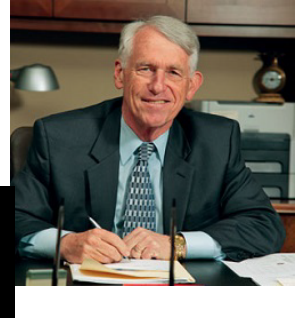
Senior Consultant

Profile



John Welty, Ed.D.
AASCU Consulting
Senior Consultant

Profile

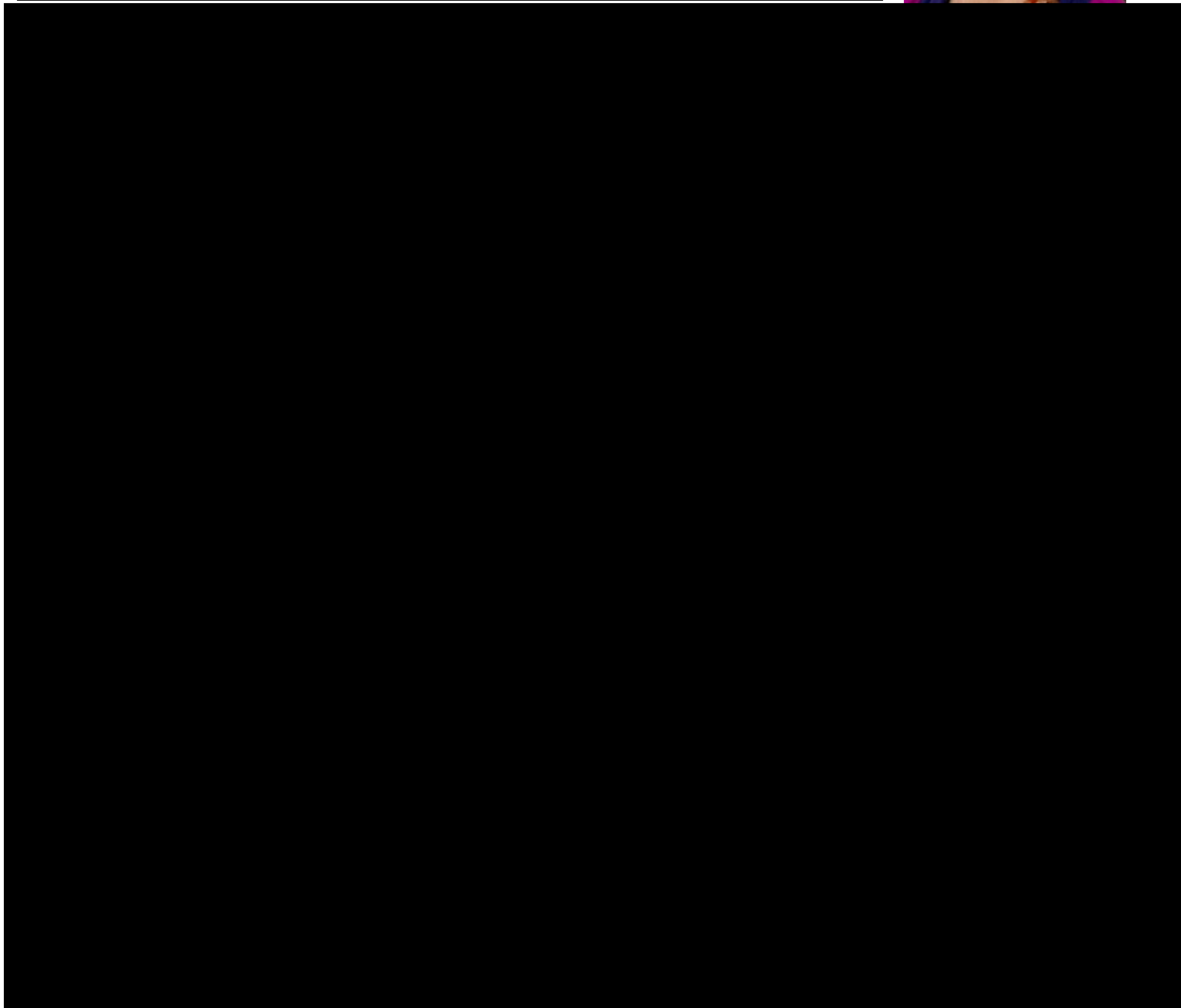
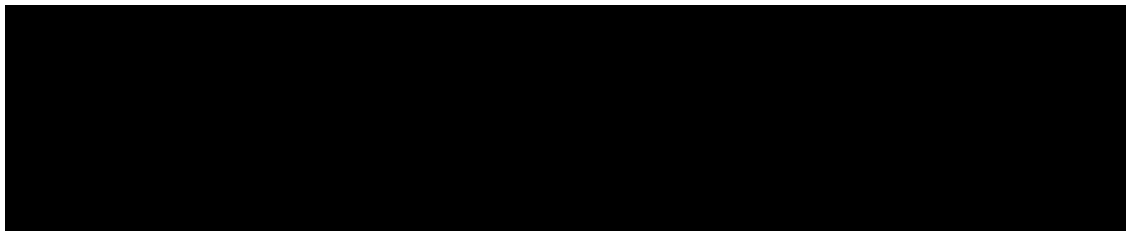


Karen Haynes, Ph.D.

AASCU Consulting

Senior Consultant

Profile



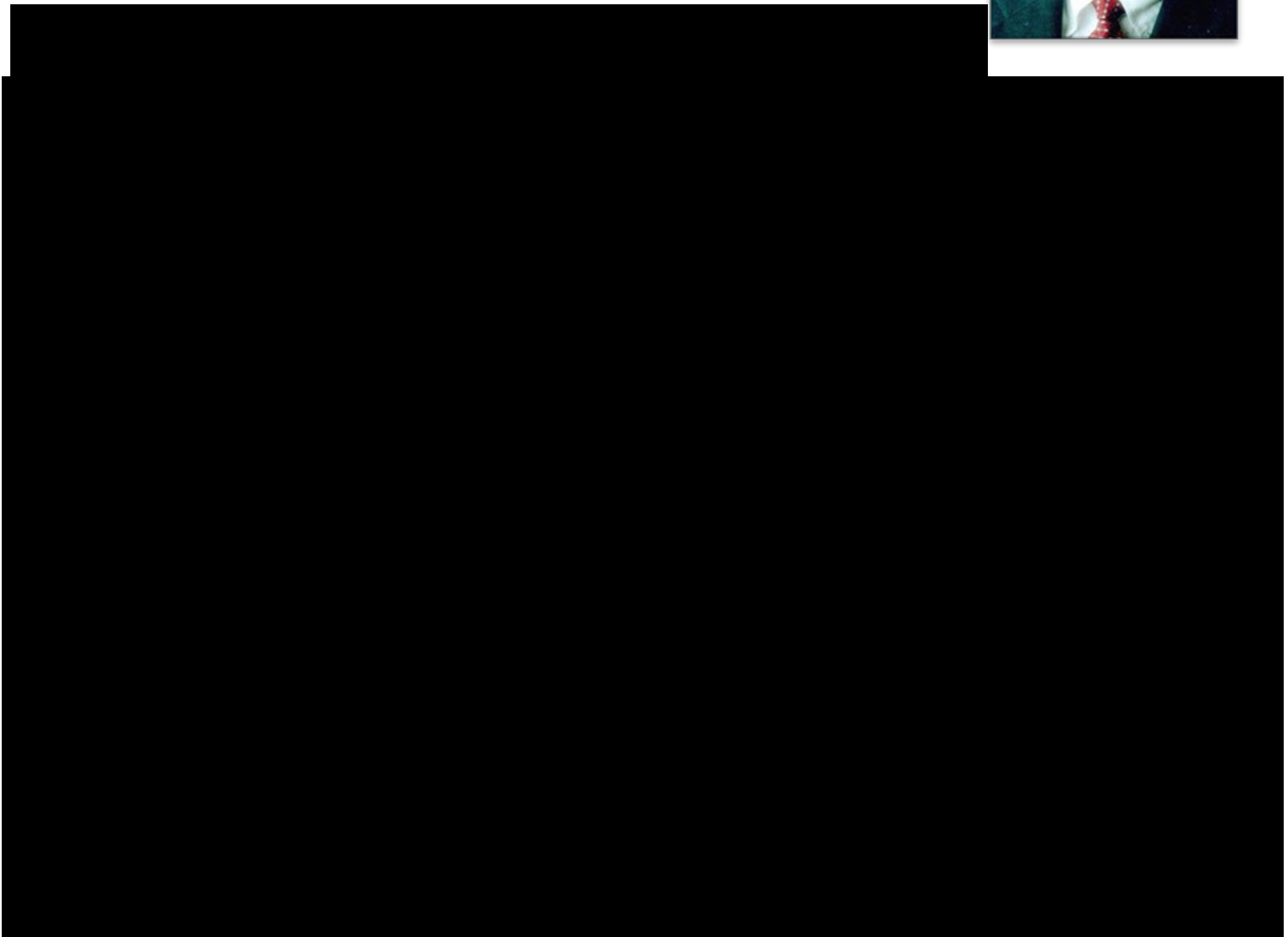


Ken Dobbins, Ph.D.

AASCU Consulting

Senior Consultant

Profile





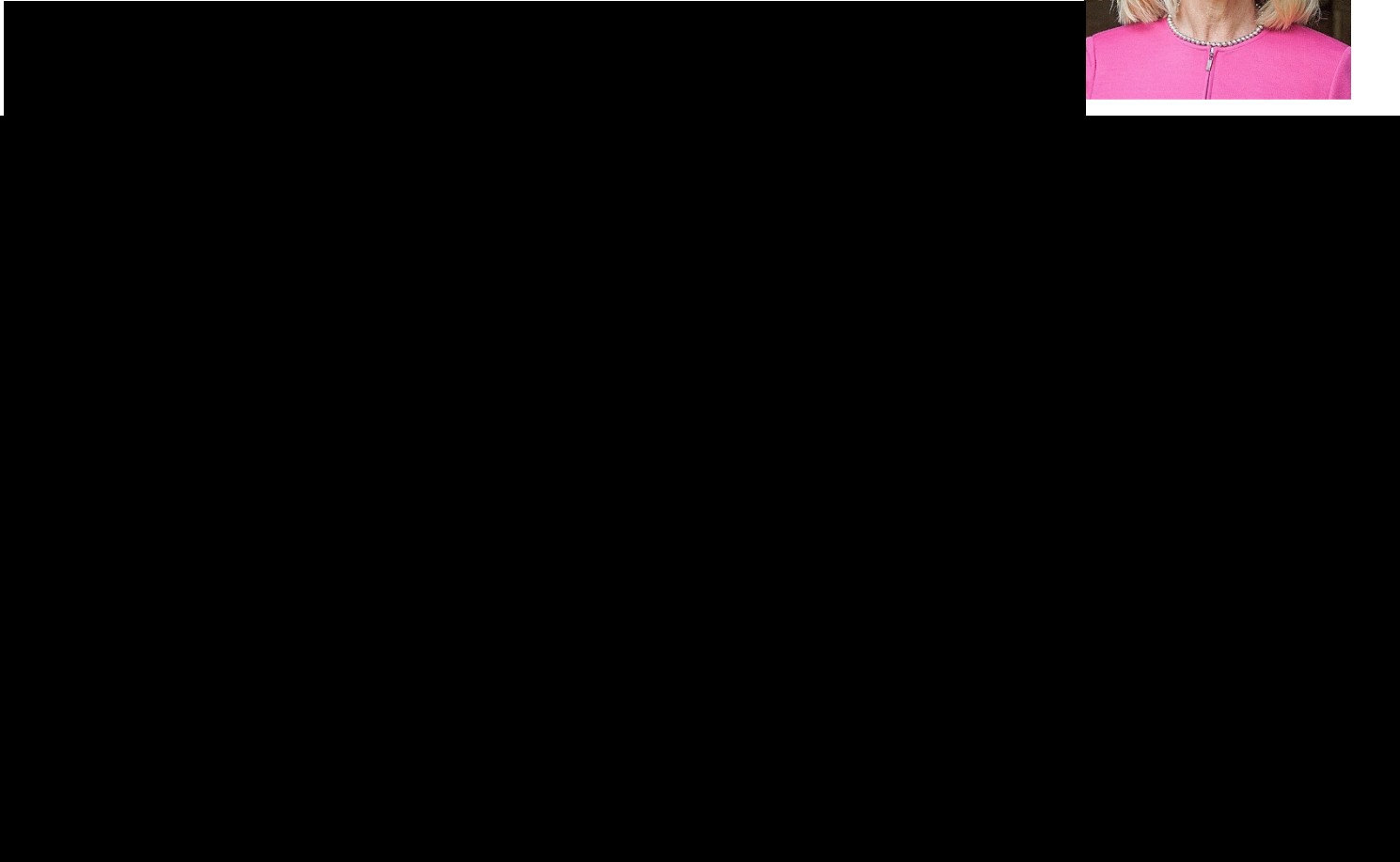
Dana Hoyt, Ph.D., CPA

AASCU Consulting

Senior Consultant



Profile



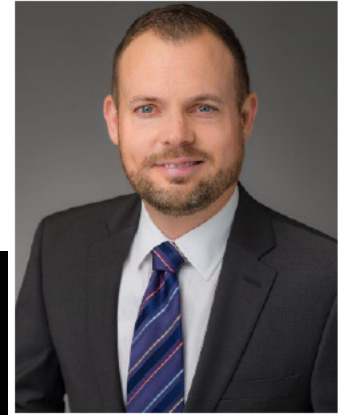


Matthew Ceppi, Ed.D.

AASCU Consulting

Executive Director

ceppim@aacu.org



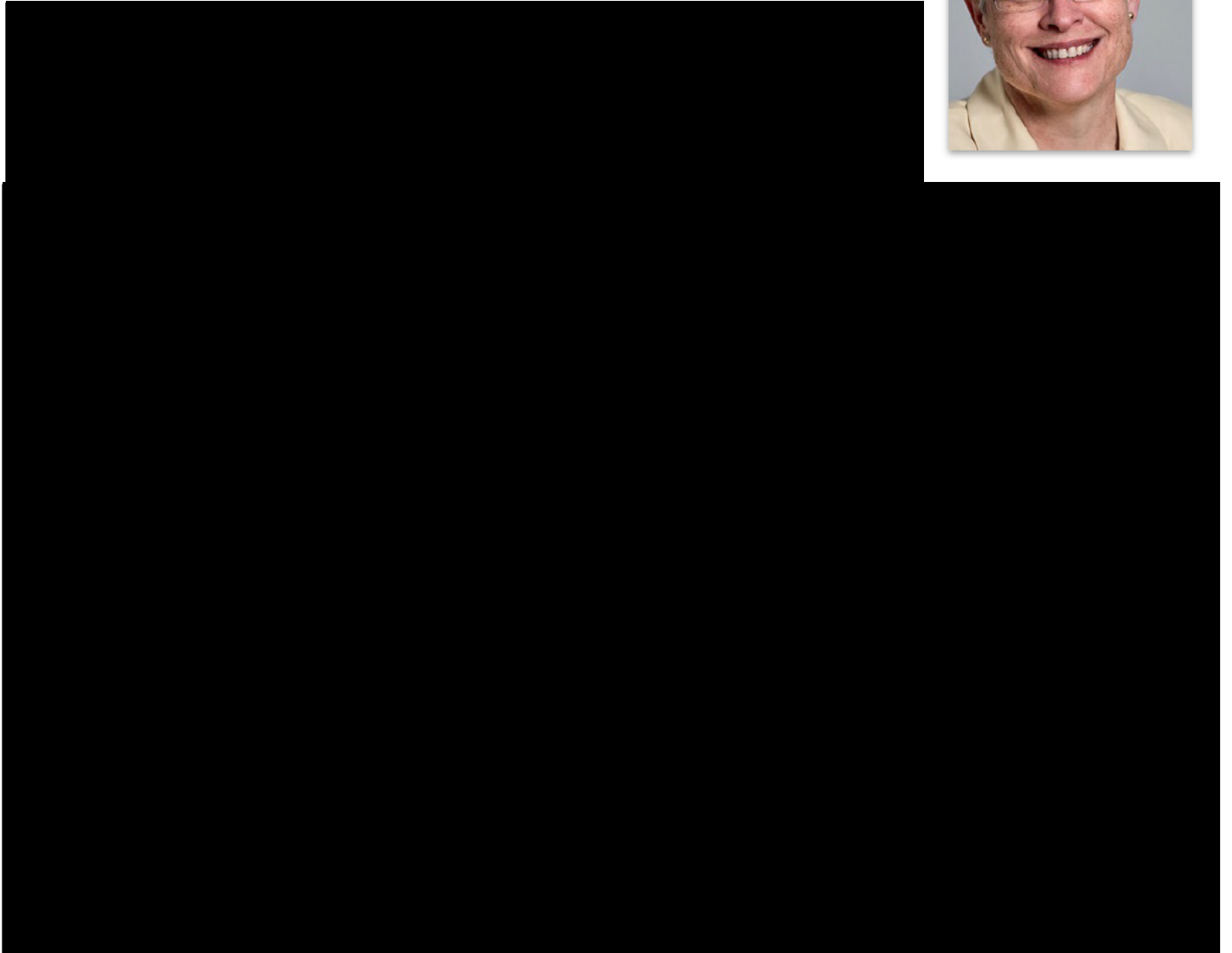
Karen Whitney, Ph.D.

AASCU Consulting

Senior Consultant



Profile

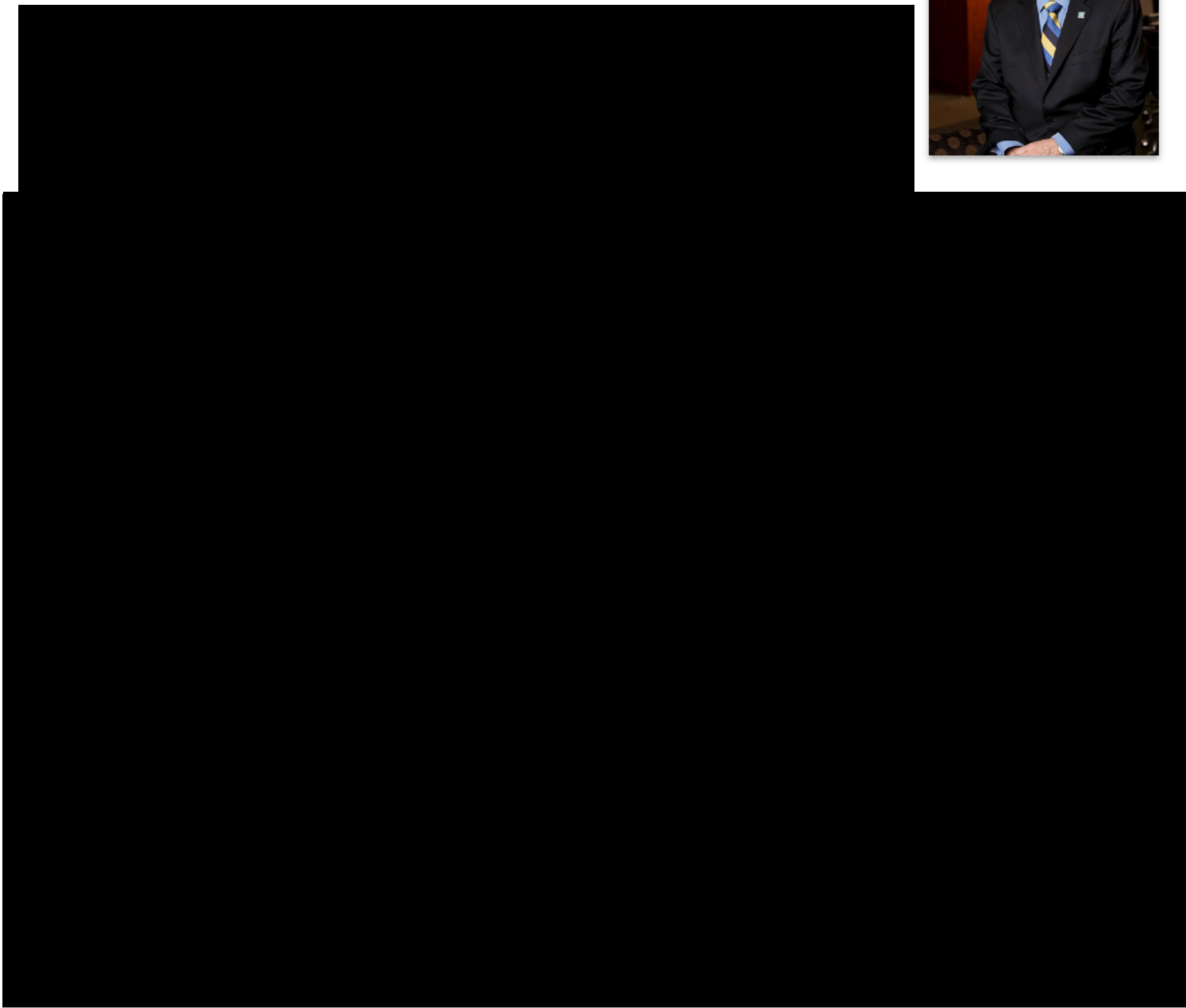


William J. Fritz, Ph.D.

AASCU Consulting

Senior Consultant

Profile

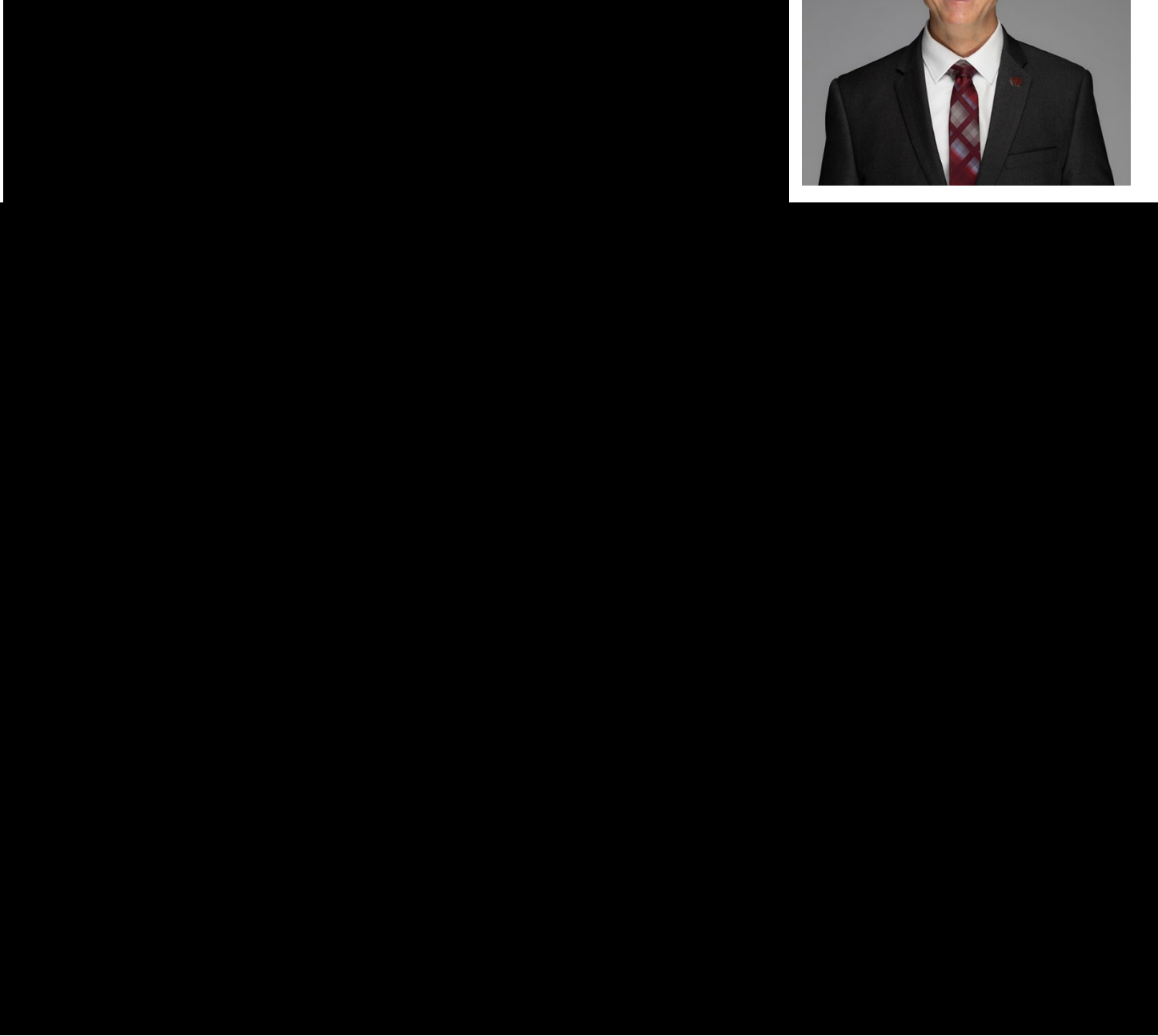




John Jasinski, Ph.D

AASCU Consulting

Senior Consultant



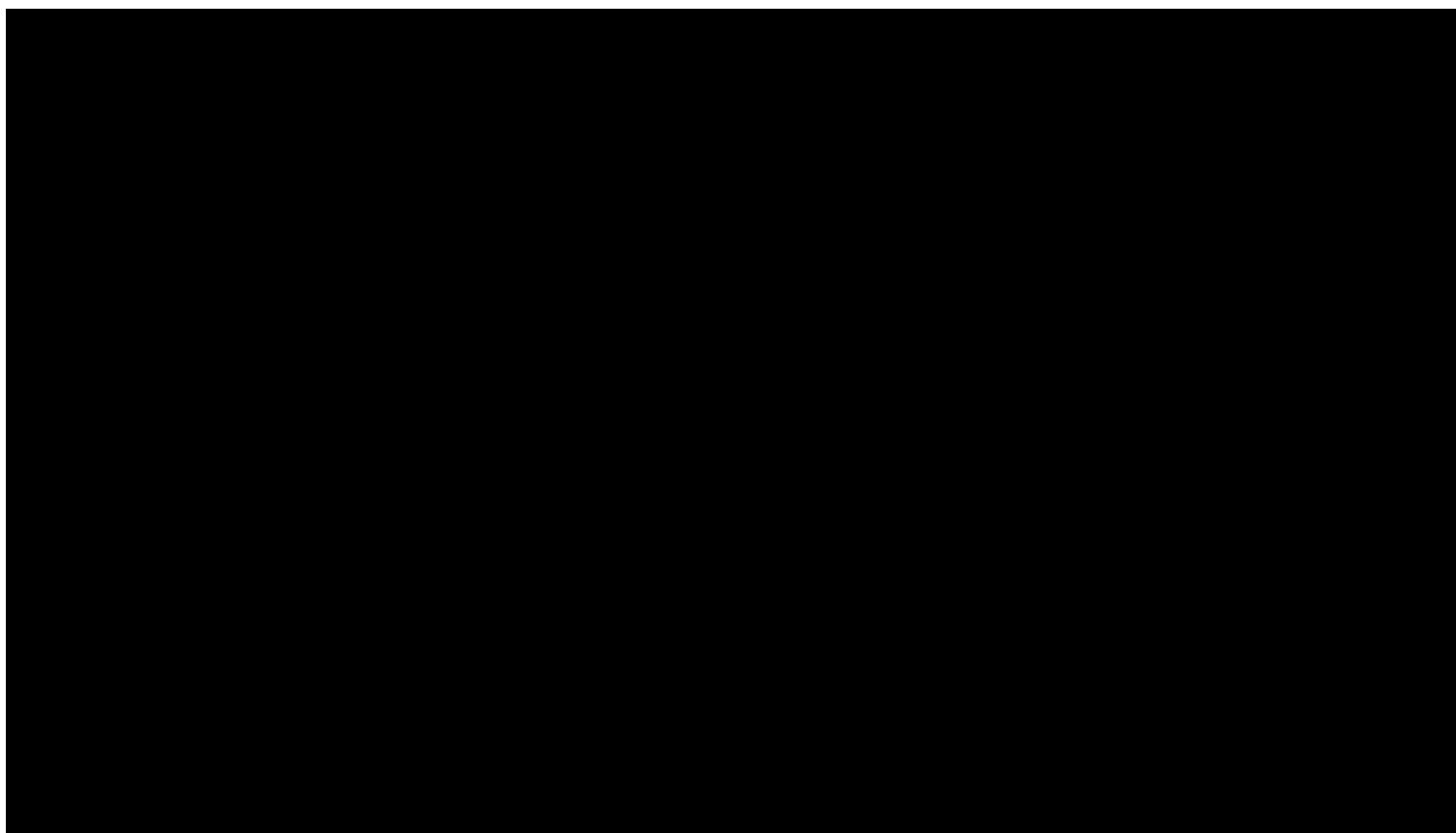
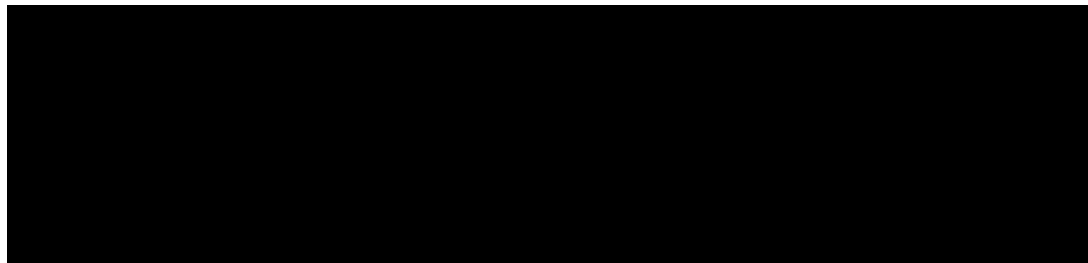
Keith Miller, Ph.D

AASCU Consulting

Senior Consultant



Profile





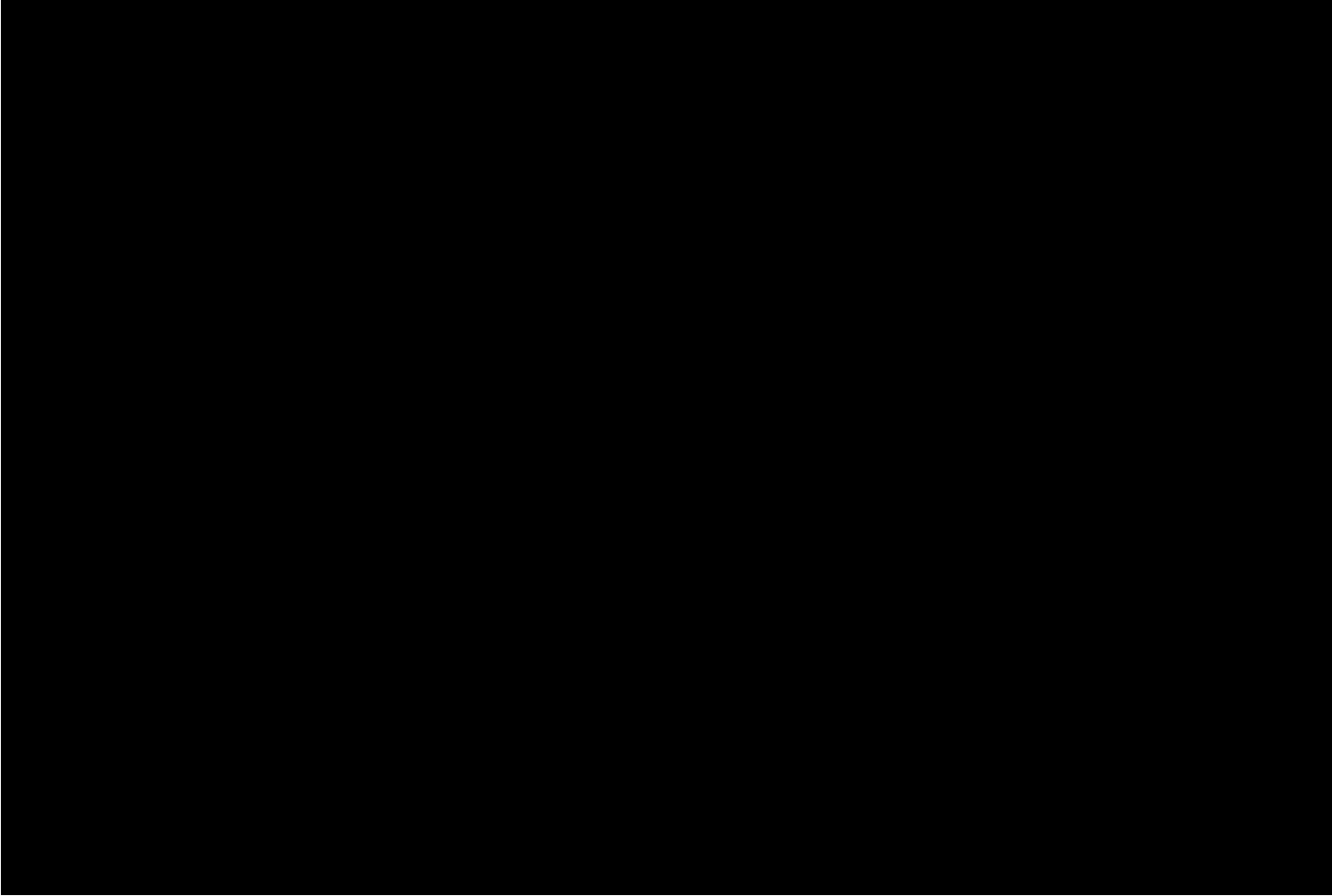
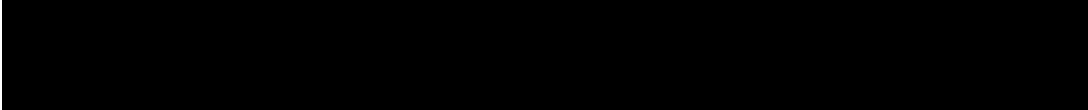
Dr. Chris Markwood, Ph.D.

AASCU Consulting

Senior Consultant



Profile

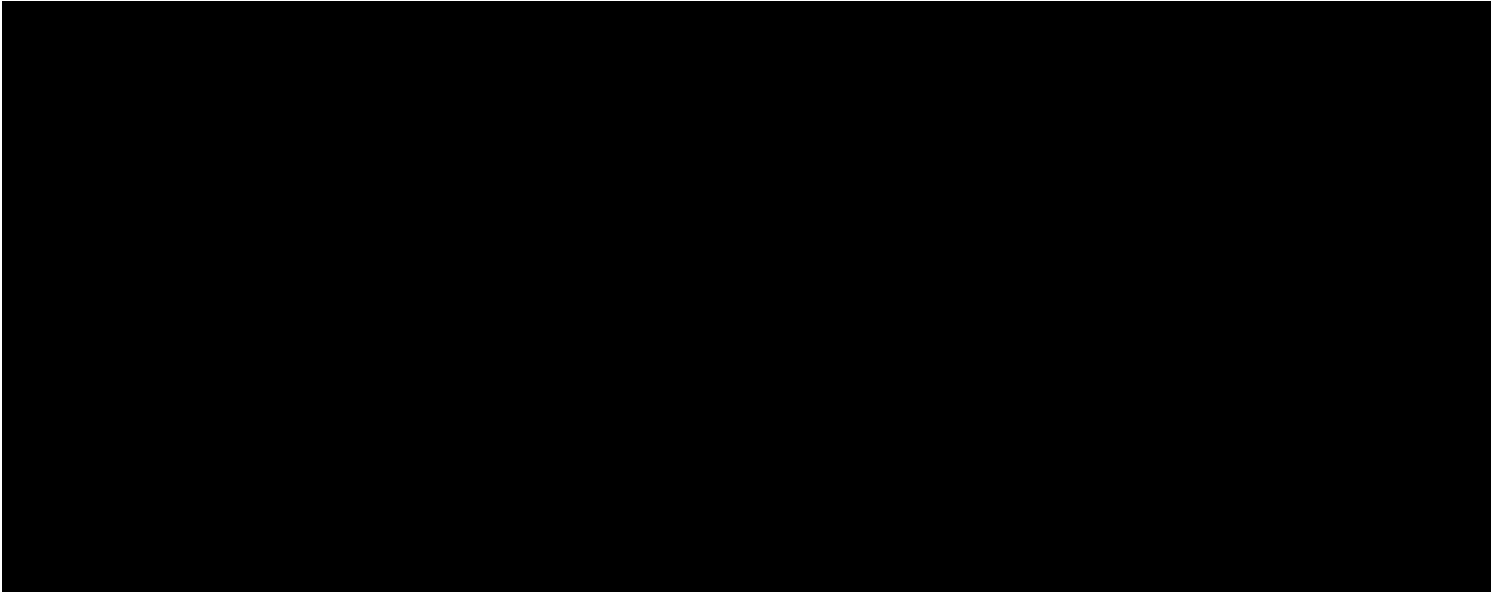




Dr. Ramon S. Torrecilha, Ph.D.

AASCU Consulting

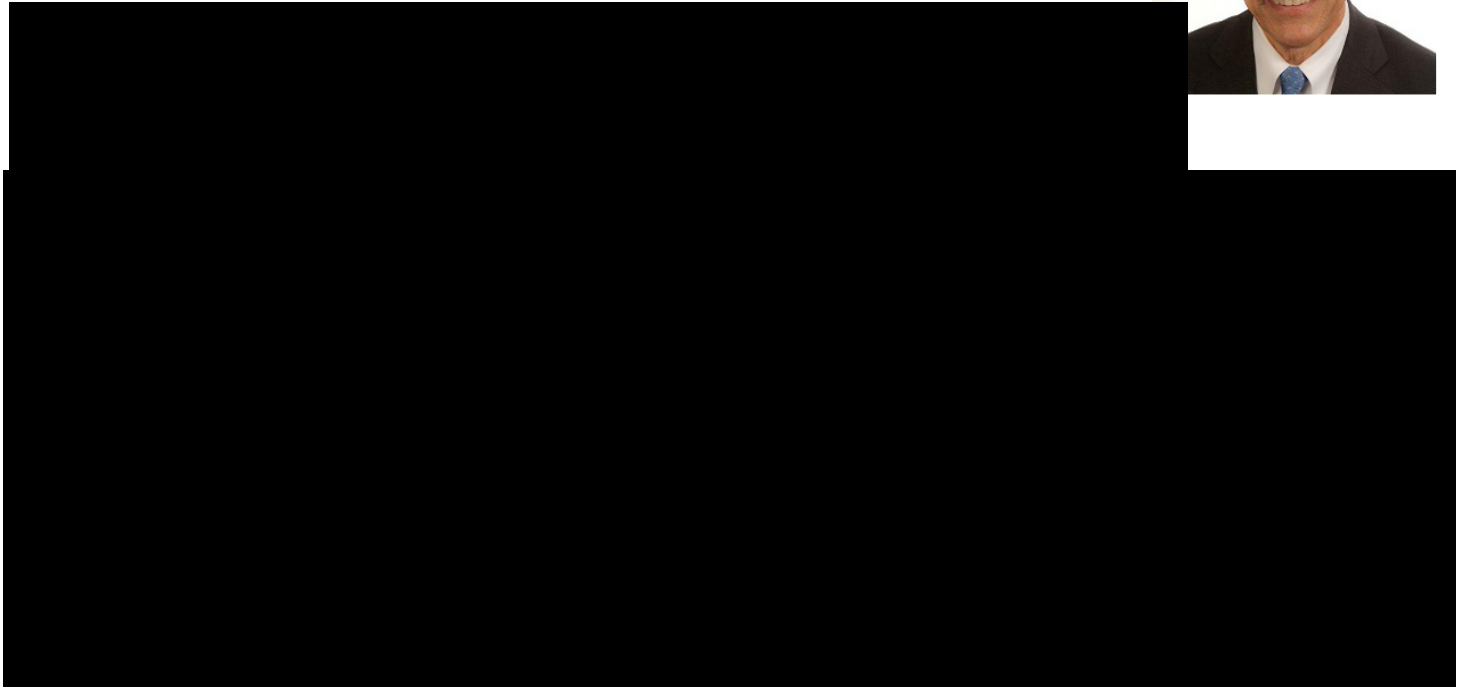
Senior Consultant



Jim Votruba, Ph.D.
AASCU Consulting
Senior Consultant



Profile



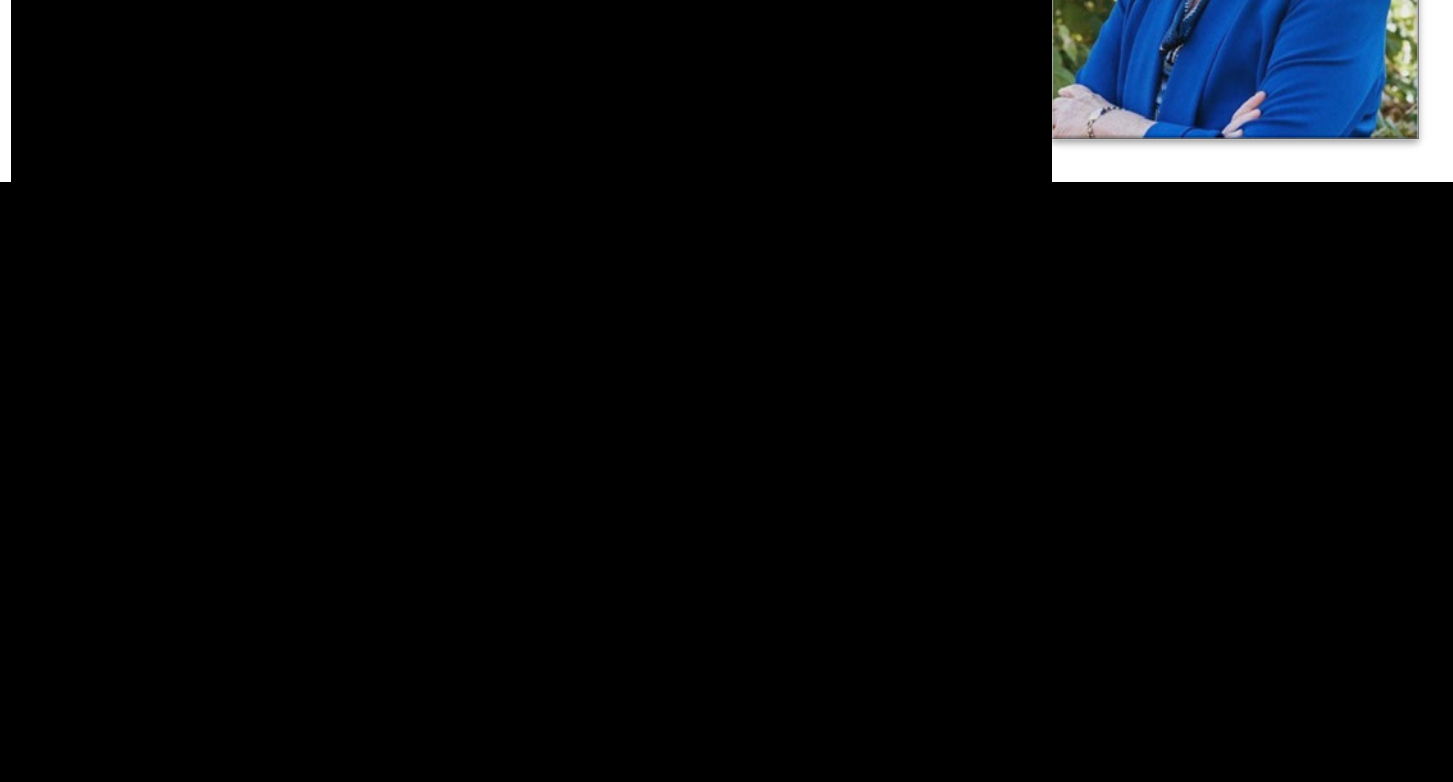


Dr. Linda Schott, Ph.D.

AASCU Consulting

Senior Consultant

Profile



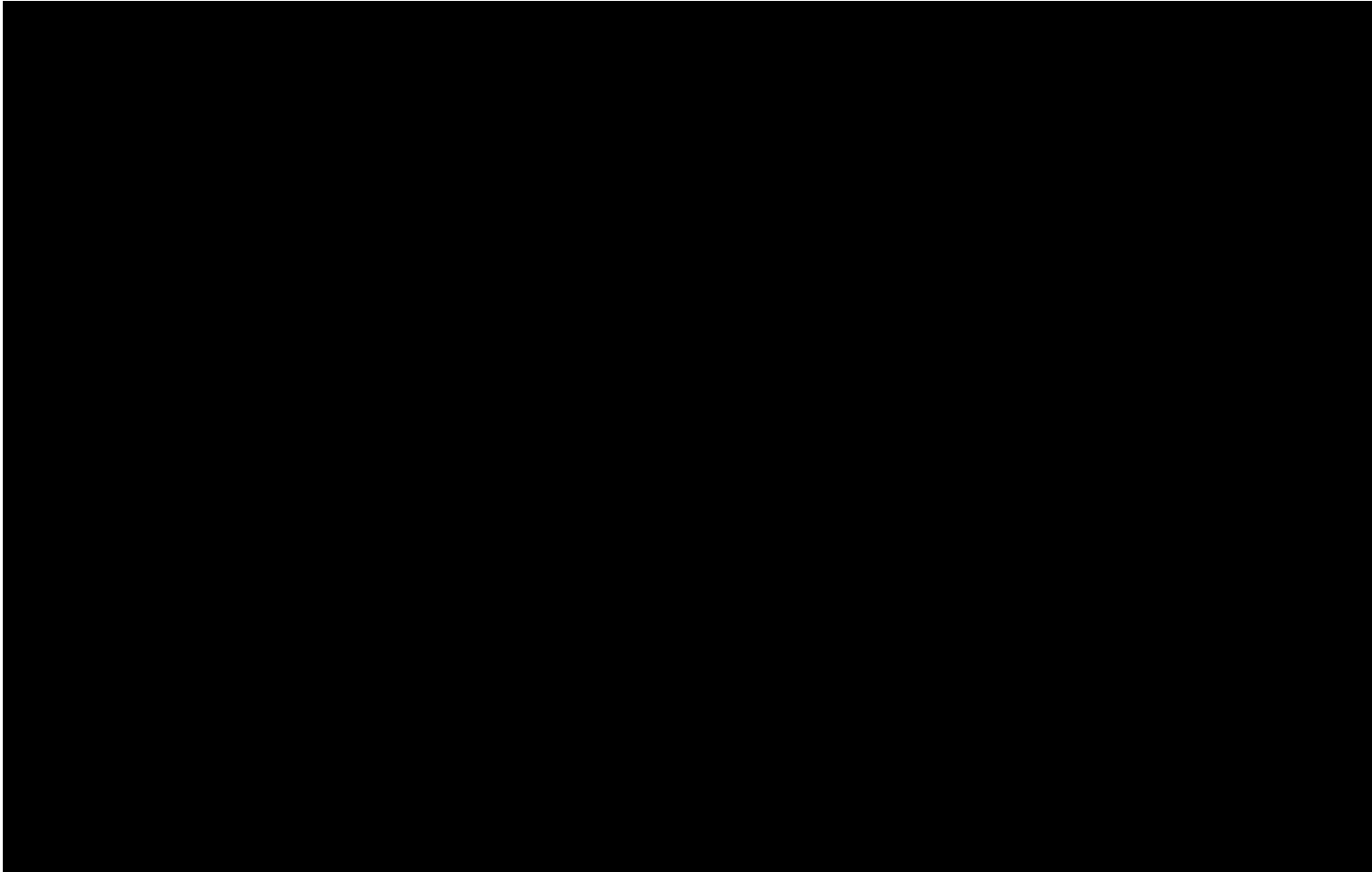
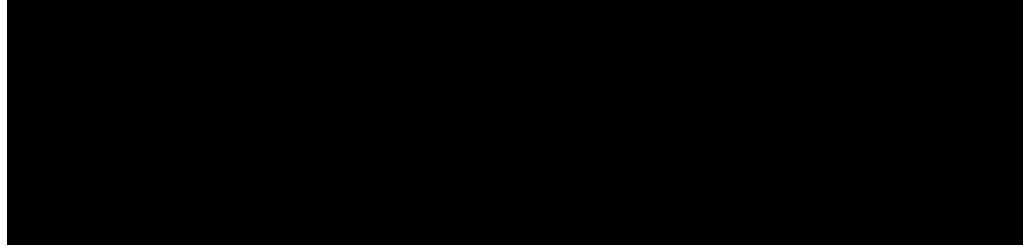


Dr. Mary Jo Gonzales, Ph.D.

AASCU Consulting

Consultant

Profile



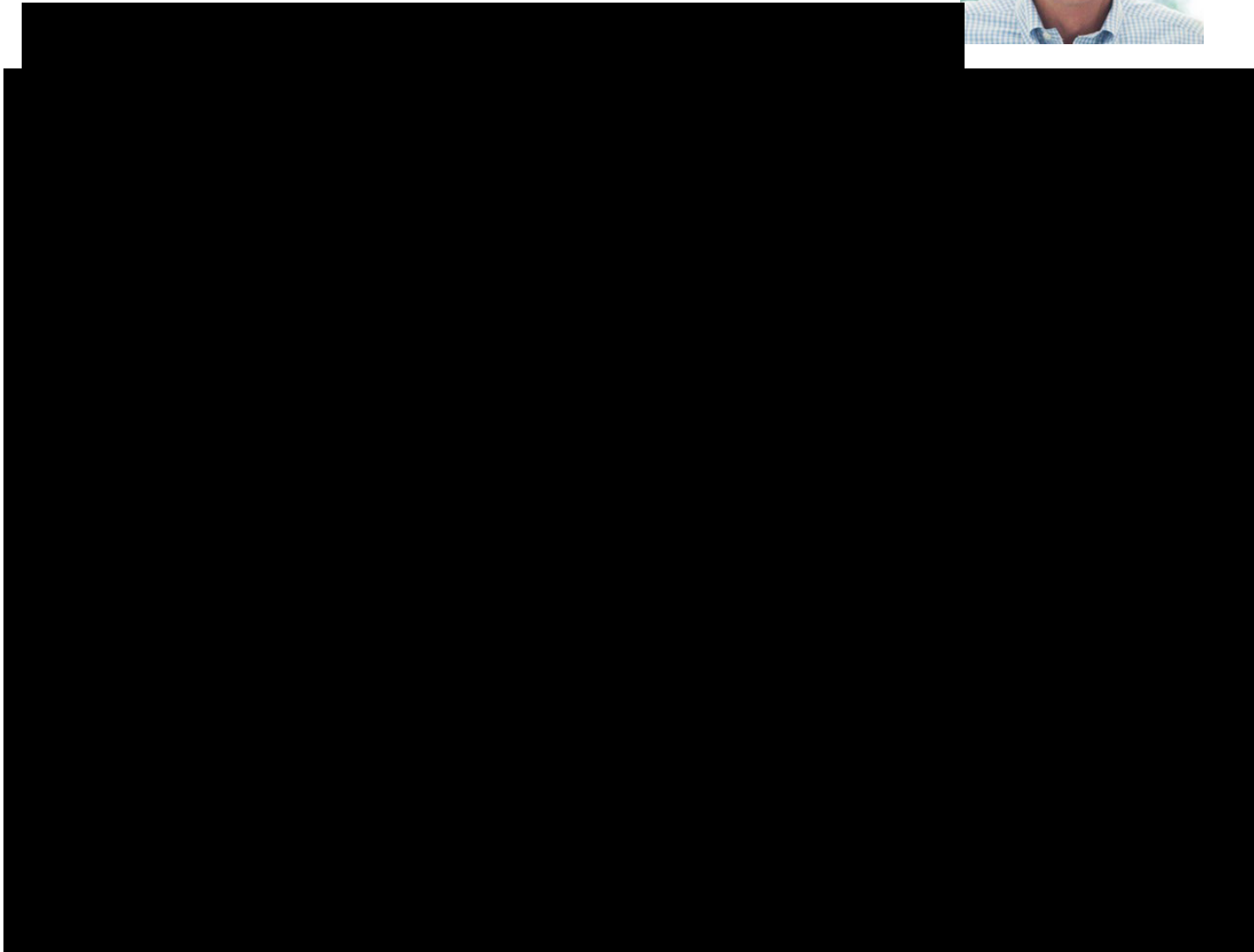


Dr. James Schroeder, Ph.D.

AASCU Consulting

Consultant

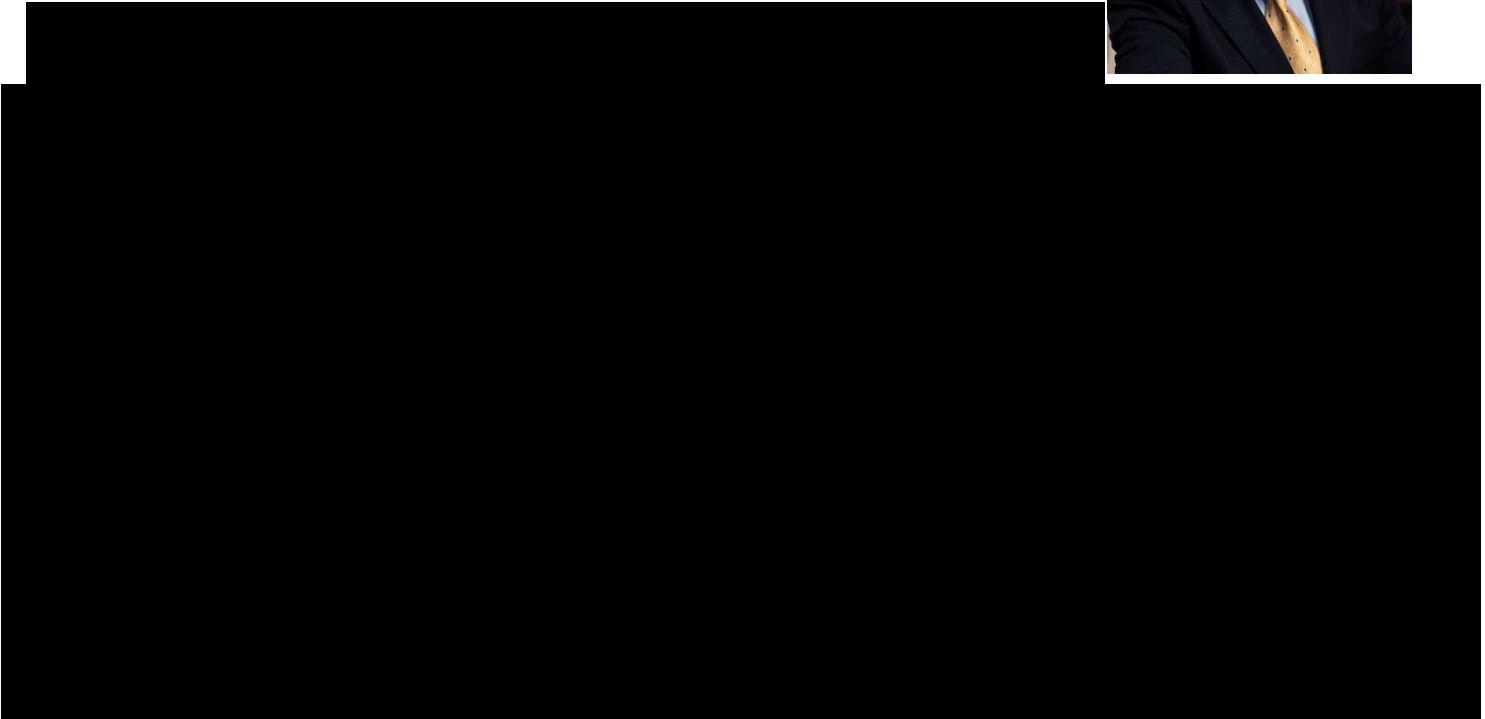
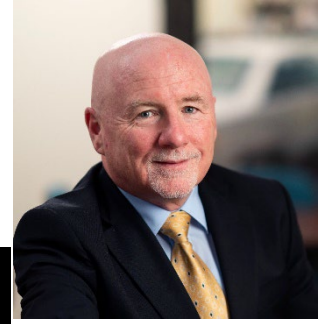
Profile





Dr. Kevin Corcoran, Ph.D.
AASCU Consulting
Senior Consultant

Profile

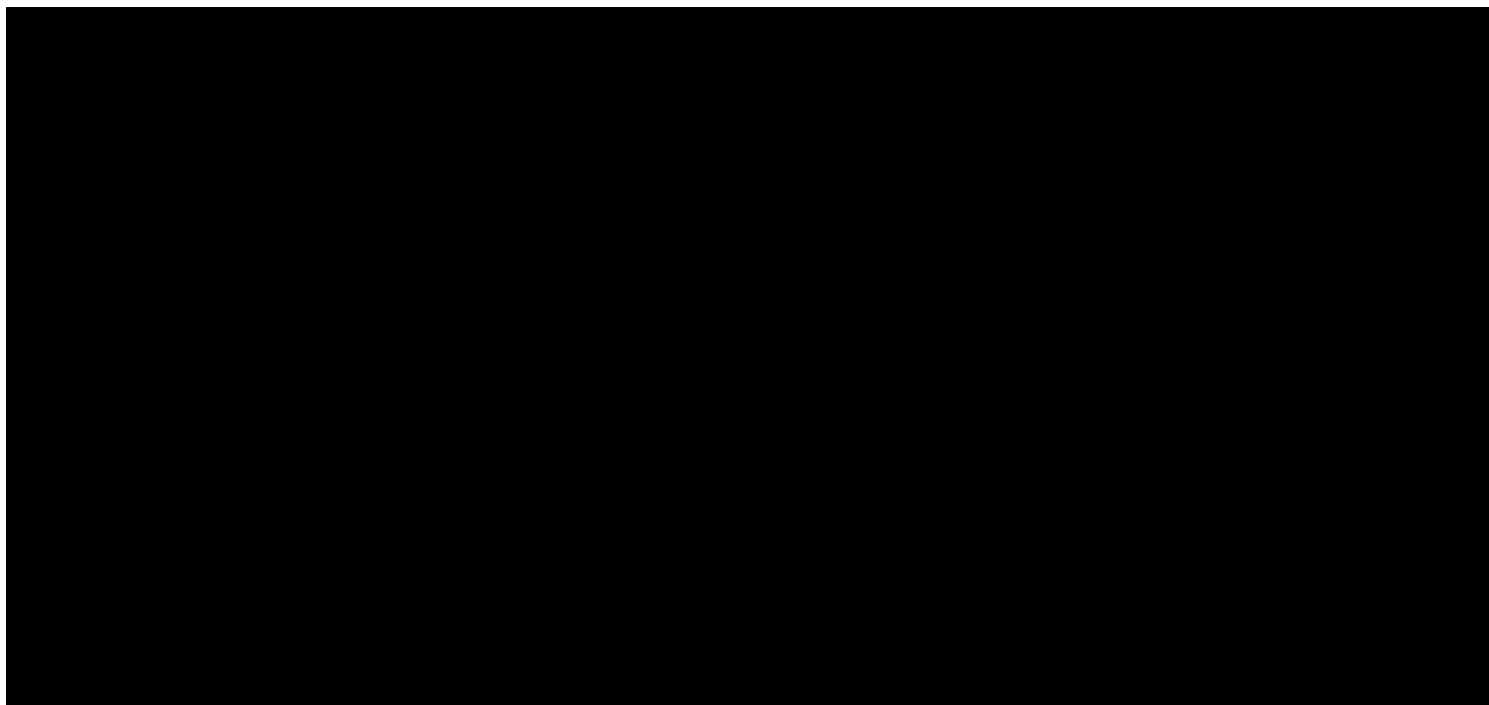




Dr. Sheryl I. Fontaine, Ph.D.

AASCU Consulting

Consultant



Negotiation Questions

1. As part of Virginia Tech standard procedures, all awarded contracts will be publicly posted on an online contracts portal. Is there any information included that would be used to identify or harm a person's identity, finances or personal information? If so, please provide a redacted copy of your proposal.
AASCU response – **Attached. We have redacted our references contact information.**
2. Are there any additional forms or documents that you will require to be incorporated into the contract documents? If so, please submit.
AASCU response – **No.**
3. Does your company agree to provide monthly invoices with payment due thirty (30) days after receipt of invoice or goods/services, whichever is later?
AASCU response – **Yes.**
4. Do you agree that you will be performing services as an Independent Contractor, Company, Corporation or other business entity and are not an employee of Virginia Tech or any other Commonwealth Entity?
AASCU response – **Yes.**
5. Do you further agree that Virginia Tech will not withhold any income taxes from its payments to contractors nor will it provide any employment benefits to the contractor or contractor's employees?
AASCU response – **Yes.**
6. Please describe your quickest turn-around time from the delivery of scope of work to the beginning of the start of work.
AASCU response – **Engagements can begin within 14 days of execution of a scope of work. Often sooner based on availability of the client.**
7. Do you agree that all information obtain and provided will be property of Virginia Tech if or when a transition of service to another provider is required?
AASCU response – **Yes.**
8. Do you agree that the initial contract period shall be two years?
ASCU response – **Yes.**
9. Upon completion of the initial contract period, does your company agree that the contract may be renewed by Virginia Tech upon written agreement of both parties for three (3) two-year periods, under the terms of the current contact?
AASCU response – **Yes.**

10. If awarded a contract, do you agree to limit price increases to no more than the increase in the Consumer Price Index, CPI-W, services category for the latest twelve (12) months for which statistics are available at the time of renewal or 3 percent, whichever is less?

AASCU response – **Yes.**

11. If awarded a contract, are you willing to hold prices firm for the initial contract period and the first year?

AASCU response – **Yes.**

12. Please identify the highest-level executive in your organization that is aware of this solicitation. Describe that person’s commitment to assuring the highest quality service to Virginia Tech if your organization is awarded a contract.

AASCU response – **Dr. Mildred Garcia is the President of the American Association of State Colleges and Universities. She is routinely briefed on proposals and awards, particularly multi-year contracts, and is routinely briefed on new engagements and engagement reviews, including AASCU Consulting’s ratings and net promoter score. Dr. Garcia is aware of our proposal to Virginia Tech.**

13. Are you willing to contact departments on a monthly basis to address service issues? If so, how can your company ensure customer service will be at its highest?

AASCU response – **Yes. Every project is assigned a project lead to ensure all deliverables are met in a timely manner and consistent with AASCU Consulting’s quality standards. Project leads meet regularly with the Executive Director and any issues are brought to their attention immediately. The Executive Director is regularly in contact with clients and would serve as the client lead for Virginia Tech. AASCU Consulting performs engagement reviews after every engagement, which includes sending the client a questionnaire.**

14. Will you be able to handle increased volumes of business and/or provide service to multiple departments and remain on a reasonable timeline for each project during the course of the contract?

AASCU response – **Yes.**

15. Please provide your best and final price structure?

AASCU response – **If awarded this contract, Virginia Tech will have the lowest published rates we will be offering in FY24 and beyond.**

| Phase | Hourly Rate |
|-------------------|-------------|
| Senior Consultant | \$375 |
| Consultant | \$300 |
| Specialist | \$200 |
| Total | |

16. How soon after contract award can you begin providing services?

AASCU response – **Within 14 days.**

17. Are you registered with and willing to participate in the eVA internet procurement solution described in the terms and conditions of the RFP?

AASCU response – **Yes.**

18. Do you acknowledge, agree and understand that Virginia Tech cannot guarantee a minimum amount of business if a contract is awarded to your company?

AASCU response – **Yes.**

19. Are the prices for all goods/services listed in your proposal inclusive of all applicable eVA system transaction fees?

AASCU response – **Yes.**

20. Does the vendor acknowledge, agree, and understand that the terms and conditions of the RFP # 5671412306 shall govern the contract if a contract is awarded to your company?

AASCU response – **Yes.**

21. Can your company become a certified SWaM vendor with the Virginia Department of Small Business and Supplier Diversity and maintain that certification throughout the term of this contract?

AASCU response – **AASCU is a 501c3 non-profit and not eligible to become a SWaM vendor.**

22. In the event you may need to subcontract a proportion of the work out to another vendor, do you agree to utilize to the fullest extent possible a SWaM certified vendor?

AASCU response – **Yes.**

23. Do you agree that all request for travel reimbursement shall be at the established GSA Travel rates for the appropriate location?

AASCU response – **Yes.**