

COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-2052-2024

This contract entered into this 17th day of July 2023 by Gallup, Inc 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 25, 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 ds
SM RN
(Initials)

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

DocuSigned by:
Contr By: Stephanie Marken
D17160DE63D7445...
(Signature)
Stephanie Marken Executive Director
Name and Title

DocuSigned by:
Virgiri By: Reed Nagel
5EF51DA320D049B...
Reed Nagel
Associate 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-?_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: _____

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

- 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:

- 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.
 - Collaborate with the requesting department to articulate a clear set of DEIB goals and draft an action plan with specific activities.
 - 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.
 - The firm(s) may provide insight and knowledge on DEIB best practices with focus on higher education.
 - 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.
 - Develop a training strategy to increase faculty/staff DEIB competencies, skills and capacity.
 - 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.
- 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

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

GALLUP®



April 25, 2023

Gallup Response to Request for Proposal 5671412306 for Organizational Consulting Services on Behalf of Virginia Tech University

SUBMITTED BY:

Stephanie Marken
Partner, Education Research
Gallup Inc.

901 F Street NW
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20004
t 202-715-3084
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DocuSigned by:

Stephanie Marken

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Gallup Response to RFP567142306
Virginia Tech University

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Gallup Response to RFP567142306
Virginia Tech University

1. Vendor Profile Information

Legal Business Name: Gallup Inc.

Legal Status: Corporation

Year in which Gallup was organized to do business: 1935

Home office address

Gallup World Headquarters
901 F Street NW
Suite 200
Washington, D.C.
20004

Telephone: 202-715-3084

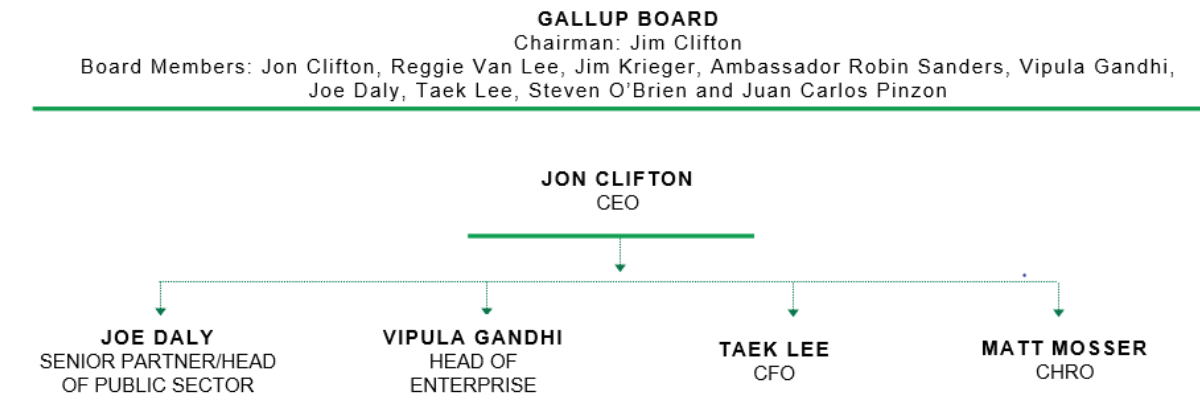
Fax number: 1-888-486-9104

Website URL: <http://gallup.com>

Organizational Chart

Figure 1 is an organizational chart demonstrating Gallup principles, including the [Gallup Board](#), and direct leadership team reporting to CEO Jon Clifton. Gallup's proposed vendor contact, Stephanie Marken, reports directly to Joe Daly.

FIGURE 1. ORGANIZATIONAL CHART



2. Vendor Organizational Capabilities

As a full-service consulting organization, Gallup's areas of expertise span many unique organizational needs including measurement of the student and employee experience, and learning and development to support managers and leaders as they confront some of the greatest challenges facing the workforce. Gallup is enthusiastic about a partnership with Virginia Tech University in which Gallup provides organizational consulting support in measurement of the employee experience, delivery of learning and development, and executive coaching. Gallup shares more about these unique capabilities in the sections that follow.

Measuring the student, faculty, staff experience across engagement, DEIB and related topics

Survey Design

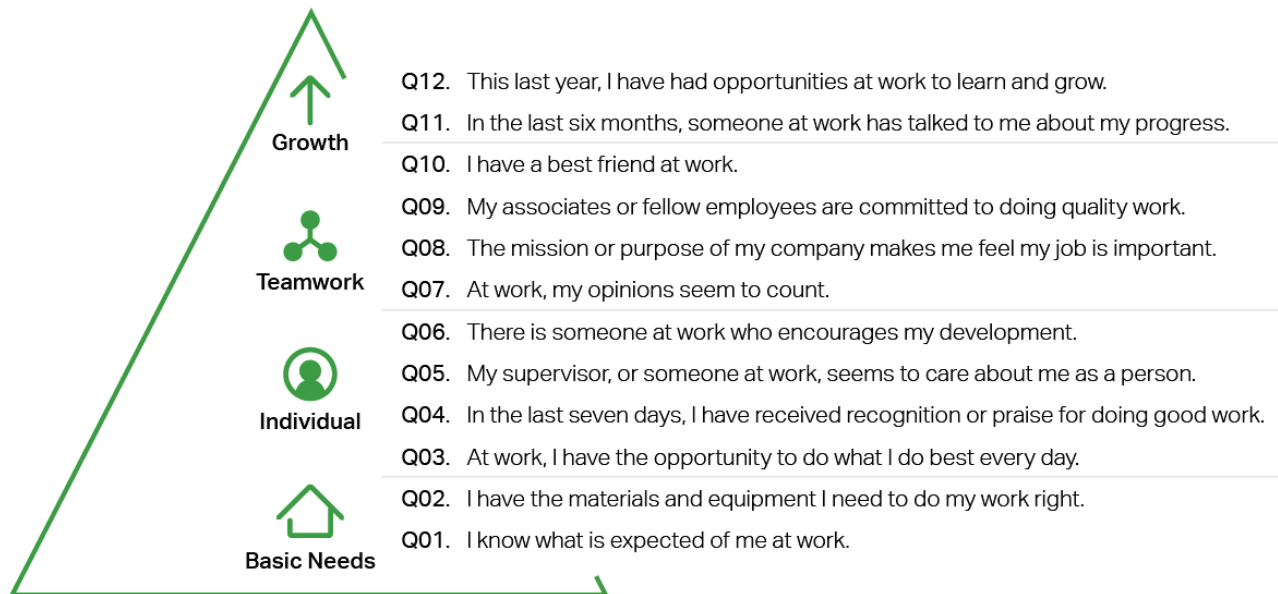
Gallup Response to RFP567142306
Virginia Tech University

Gallup has surveyed tens of millions of individuals in the U.S. and globally to understand their employee experience. Gallup currently partners with more than 100 higher education institutions to conduct surveys of faculty, staff and student populations measuring engagement, DEIB, wellbeing, burnout and related topics. These studies provide leaders a better understanding of their organization's strengths and opportunities for improvement so that they can continue to attract and retain students, and talented faculty and staff members despite significant disruptions in the labor market.

Gallup's quantitative surveys are customized to the unique needs of its institutional partners so that the survey provides relevant feedback to senior leaders within the institution that will improve the student and employee experience.

Most of the surveys conducted with faculty and staff members leverage Gallup's proprietary database of over 375 questions and indexes measuring the employee experience. Among these indexes is the Gallup Q¹² employee engagement index, which assesses the extent to which employees are emotionally committed and connected to their work and workplace. For more than 40 years, Gallup has been studying employee engagement. Over this period, Gallup has tested thousands of questions to identify the most important drivers of engagement. Gallup used sophisticated analysis to identify the 12 most important measures of psychological commitment to one's work and workplace. Every four years, Gallup conducts this validation again to ensure its proprietary measures to be the most appropriate measures of engagement.¹ This robust work has resulted in Gallup's proprietary Q¹² employee engagement index which Virginia Tech can use in its surveys to assess faculty and staff engagement.

FIGURE 1: GALLUP'S ENGAGEMENT HIERARCHY



Each of the Gallup Q¹² items is directly linked to an employee need. Gallup's research confirms that when employee needs are met, organizational outcomes improve. Compared with bottom-quartile employees, top-quartile employees display a 41% reduction in absenteeism and 17% higher productivity.

¹ <https://www.gallup.com/workplace/321725/gallup-q12-meta-analysis-report.aspx>

Gallup Response to RFP567142306
Virginia Tech University

FIGURE 2: GALLUP’S CORE ENGAGEMENT ITEMS AND ASSOCIATED NEEDS

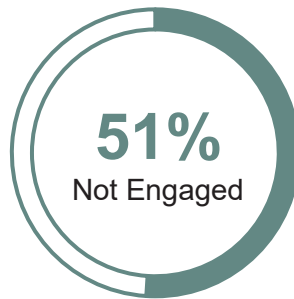
Q12.	This last year, I have had opportunities at work to learn and grow.	Challenge Me
Q11.	In the last six months, someone at work has talked to me about my progress.	Help Me Review My Contributions
Q10.	I have a best friend at work.	Help Me Build Mutual Trust
Q09.	My fellow employees are committed to doing quality work.	Help Me Feel Proud
Q08.	The mission or purpose of my company makes me feel my job is important.	Help Me See My Importance
Q07.	At work, my opinions seem to count.	Listen To Me
Q06.	There is someone at work who encourages my development.	Help Me Grow
Q05.	My supervisor, or someone at work, seems to care about me as a person.	Care About Me
Q04.	In the last seven days, I have received recognition or praise for doing good work.	Help Me See My Value
Q03.	At work, I have the opportunity to do what I do best every day.	Know Me
Q02.	I have the materials and equipment I need to do my work right.	Free Me From Unnecessary Stress
Q01.	I know what is expected of me at work.	Focus Me

These twelve elements of employee engagement predict high team performance. Gallup uses these 12 questions to categorize employees into three groups: engaged, not engaged and actively disengaged. Gallup research finds 32% of U.S. workers nationally are engaged — meaning they are psychologically committed to their organizations — leaving the remaining 68% falling short of their potential.

Notably, engagement is strongly connected to inclusiveness. Fifty-one percent of engaged employees perceive their organization as perfectly inclusive, rating them a “5” on a five-point Likert scale for all of Gallup’s inclusion items. Seventy-seven percent of engaged employees strongly agree when asked, “If I raised a concern about discrimination, I am confident my employer would do what is right,” compared with 8% of actively disengaged employees.



These employees are loyal and psychologically committed to their company. They are more likely to stay for at least a year.



These employees may be productive, but they are not psychologically connected to their company. They are more



These employees are physically present but psychologically absent. They are unhappy with their work situation

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likely to miss workdays and
more likely to leave.

and insist on sharing this
unhappiness with their colleagues.

Most of Gallup's clients are complementing this measure of engagement with other important and related metrics that assess DEIB and cover the topics of diversity, equity, inclusion, belonging, trust, dignity, respect, civility and value. Many of Gallup's higher education clients use its [Culture of Inclusion index](#). The Culture of Inclusion index was developed through extensive research and testing via a nationally representative survey of U.S. adults. In this national survey, participants were asked if they had experienced discrimination, nonsexual harassment or sexual harassment of any form at work during the previous 12 months. Participants were asked if they experienced any of 32 specific forms of discrimination, nonsexual harassment (11 forms, such as personal insults, jokes, threats, physical contact) or sexual harassment (seven forms, such as comments, jokes, touching, suggestions) at work in the past 12 months. Gallup conducted analysis to identify the top predictors of discrimination and harassment. Forty-two potential predictors (e.g., workplace experience, culture, engagement, personal characteristics, supervisor characteristics, job type, team composition) were studied in relation to each form of discrimination and harassment. Gallup used regression modeling to identify the top environmental workplace predictors of discrimination and harassment while controlling for personal characteristics (e.g., age, race, gender, marital status, income) and assessed additive effects. Analysis revealed that three items captured the majority of unique variance in predicting the likelihood of discrimination and harassment in the workplace:

- 1 At work, I am treated with respect.
- 2 My employer is committed to building the strengths of each employee.
- 3 If I raised a concern about ethics and integrity, I am confident my employer would do what is right.

These items are complemented by a series of other items Gallup has developed to address related concepts among faculty and staff:

- 1 Comfort being one's self
- 2 The extent to which diversity and inclusion are openly discussed at the school/within the workplace
- 3 If individuals are treated with "respect and dignity"
- 4 The extent to which individuals are treated fairly regardless of their ethnic background, race, gender, age, disability or other differences
- 5 Trust in the institution to treat everyone fairly
- 6 The extent to which the individual feels *they* have been treated fairly
- 7 Fair pay for faculty and staff
- 8 Whether there are equal opportunities for advancement for all faculty and staff
- 9 Whether the individual feels they are a valued member of the community
- 10 Whether the the individual feels they belong
- 11 Whether the individual feels their unique contributions are appreciated
- 12 The extent to which leadership creates an environment that is trusting and open
- 13 The extent to which students at the school look out for one another
- 14 The extent to which the school is a good place for students who are members of racial and ethnic minority groups

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While DEIB is the most commonly pulsed topic in Gallup’s database, Gallup also maintains validated items measuring issues of wellbeing, burnout, change management, retention, empowerment, manager effectiveness, work/life balance, pay and compensation concerns, and collaboration, among others. All items are thoroughly tested before they are incorporated into Gallup’s database of questions. Gallup works with its clients to identify which topics are most relevant to the particular survey the organization is conducting, and which items within these areas best measure the construct the institution is interested in covering. Gallup will work with the Virginia Tech team throughout these survey design processes to identify the right items that will lead to valuable insights and meaningful change throughout the institution. These items will also be available to the University for the purposes of developing pulse surveys.

LEADERSHIP	Strategy	Career Advancement	CHANGE MANAGEMENT	Coaching
Collaboration	Communication	Organization Advocacy	Culture of Performance	Retention
Customer Service	DIVERSITY, EQUITY & INCLUSION	Employee Engagement	Proactive Engagement Behaviors	Engagement Program Accountability
WELLBEING	Empowerment	Ethics	Expectations, Priorities & Goals	Customer Centricity
Nursing/Patient Experience	Trust	Mission, Vision & Values	Onboarding	Pay & Compensation
Performance Evaluation & Appraisal	Performance Feedback	Safety	Strengths Focus	Systems & Procedures
Teamwork	Internal Customer Satisfaction	MANAGER EFFECTIVENESS	Learning and Development	Work/Life Balance

FIGURE 3. EXAMPLES OF GALLUP INDICES AVAILABLE FOR PULSING

Gallup’s surveys of currently enrolled students cover related, complementary topics to those covered in Gallup’s employee surveys.

Data Collection

Once the survey is designed, Gallup will conduct all aspects of the data collection process, including establishing a communications framework that ensures students and employees hear about the effort at least three times prior to, during and after data collection. Gallup will provide the Virginia Tech team with examples of basic communications to use, including sample text for an executive letter, a list of FAQs and a post-survey “thank you” email. Additionally, Gallup will send an introductory email to each sample respondent one week prior to the survey launch, as well as an invitation letter and reminder emails every three days until the completion of the survey field period. These nonresponse follow-up emails will help maximize participation. Gallup-provided communications resources and activities include:

- a communications guide with information and guidance on managing communications year-round
- sample text for an executive letter, a list of FAQs for managers and a post-survey “thank you” email
- a pre-notification email to all employees announcing the survey dates, as well as an email inviting them to participate, including an embedded web link leading to the survey website, their individual access code, and an explanation of confidentiality and participation
- reminder emails or letters to all employees who have not yet completed the survey sent every three days until the participant completes the survey (these emails will again contain the link and an individual access code)

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Gallup can further customize these communications and timeline as helpful to Virginia Tech.

Analysis and Reporting

Measurement is effective only when it is part of an organization's culture, which is why Gallup works closely with its clients to visualize and report data in an engaging way that cascades throughout the organization. Gallup frequently reports these data through Gallup Access, which is a cloud-based system that gives universities everything they need to build a thriving culture— not only Gallup's powerful survey engine, but also its benchmarked data reporting and best practice workplace and management advice based on decades of its research.

Many organizations choose Gallup for its robust benchmarking capabilities. Gallup works in a variety of capacities with all major industries, including higher education clients. As an example, Gallup has established a historical employee engagement database of 31 million respondents in 198 countries, with 1,217 clients represented. For benchmarking an organization's results, Gallup uses its iteratively updated, rolling five-year database, which compares an organization with more than 11 million respondents. Gallup can also segment the current database into industry-specific databases including by higher education staff members specifically. This will provide Virginia Tech with important peer-normative data for comparison purposes. Gallup has used this tool with higher education institutions for more than 25 years.

Gallup's database of approximately 120,000 higher education faculty and staff member responses includes institutions that have measured engagement using the Gallup Q¹² items, as well as custom questions and indices such as the Gallup Culture of Inclusion Index, Wellbeing Index and other indices addressing change management, communications and leadership. Gallup will work collaboratively with the Virginia Tech team to identify appropriate and helpful benchmarks that can be used at the analysis and reporting phase. These benchmarks will be available in the Gallup Access platform so that leaders can view differences between Virginia Tech's results and other groups nationally.

Manager-level reports generated in Gallup Access are simple, actionable and designed with the final users in mind. Each report provides imperative context (e.g., workgroup unit sample sizes) so that leaders can accurately interpret the results. During setup, leaders may select the sample size threshold required to report workgroup results. The suppression threshold for reporting workgroup results can be set to no fewer than five employees to preserve respondent anonymity. Gallup understands that leaders are often too busy to develop a report or PowerPoint presentation based on their teams' survey results, which is why Access does it for them. Access offers presentation-ready reports in PDF and PowerPoint formats. Users can choose executive-level summaries or in-depth reports focused on specific segments. Survey data can also be exported into Excel for custom analysis projects.

Results are shared in multiple formats—several examples include:

Heatmap reporting: The heatmap functionality displays employee engagement data via cross-tabulation reporting, allowing Virginia Tech to quickly interpret the data. The colors of the heatmap correspond to the quartile and 90th percentile values in Gallup's overall database. All reporting variables and attributes are available within the heatmap tool, including all Q¹² questions. Leaders can compare their survey results across the institution.

Advanced data tool: Gallup Access also allows for ad hoc report creation. Any employee variable or attribute provided by the university in its employee respondent file, or responses to items included in the survey reporting options, can be used to create a scorecard. Gallup clients find this feature beneficial when exploring information related to matrixed reporting structures and employees working across multiple project teams.

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Text analytics: The text analytics tool in Gallup Access is a natural language processing solution designed for large-scale surveys. It readily extracts key thematic topics and the associated sentiment regarding each topic. The text summary dashboard gauges the climate in the organization as a whole, and filtering options enable drill-down capabilities to uncover local dynamics at a team level. The sentiment analysis dashboard reports the total number of respondents to each open-ended survey question and shows a breakout of sentiment at four levels: positive, negative, neutral and mixed. If the same open-ended question is asked in a later survey, the sentiment analysis dashboard will display a bar chart showing the current and past sentiment scores.

Gallup also creates executive PowerPoint presentations at the conclusion of each survey administration. This deliverable is presented to key stakeholders and provided in addition to all of the aforementioned survey reporting and analysis available on Gallup Access. The executive presentation will focus on insights from Virginia Tech's most recent student and/or employee data, implications for Virginia Tech's culture and its business, and strategic recommendations to drive improvement. Gallup will also leverage data and insights from its higher education research and global polling as context for evaluating the engagement results and next steps.

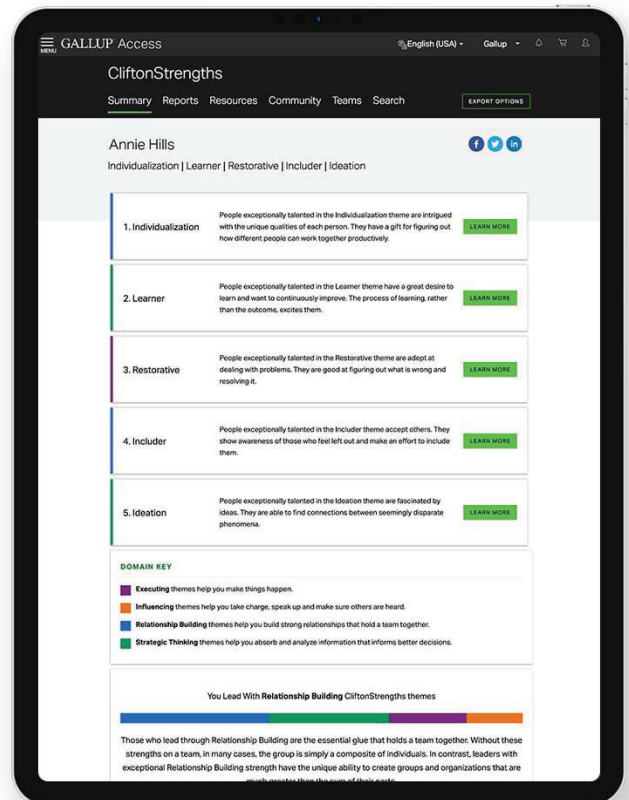
Learning and Development

Since 1935, people have trusted Gallup to find out how individuals worldwide conduct their lives. For decades, Gallup has studied how the most successful people advance their personal and professional development to get the best results. Gallup has taught hundreds of thousands of people and developed learning solutions for some of the most influential organizations in the world. Gallup learning teaches organizations more than just about research findings, but rather how to find human potential and switch it on.

The foremost reason people change jobs today is career growth opportunities. Development and growth aren't the only factors that retain talented employees, but they are crucial. Employees need to see a path forward in their organization through opportunities to acquire new skills, work with different people or experience greater autonomy. These opportunities happen best through ongoing coaching conversations. Engaged employees report having meaningful feedback at least once per week.

CliftonStrengths Developmental Tool

For decades, Gallup has supported individual citizens, students, faculty, staff and leaders in understanding their unique strengths, and how these strengths can be applied to help them achieve their goals. Gallup uses a scientifically validated, quantitative assessment tool—CliftonStrengths—to help individuals understand their unique talents. This assessment is rooted in positive psychology and the belief that individuals can achieve excellence when they focus on their unique strengths. To date, more than 29 million people globally have taken this tool, including approximately a quarter of incoming first-year students across colleges nationally. Gallup has supported Virginia Tech in scaling CliftonStrengths to its students, faculty and staff, and is enthusiastic about future opportunities to deepen this relationship.



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Gallup Courses

Gallup applies science of the highest rigor to questions of the greatest importance. How do people reach their potential? What's the nature of talent? What do the world's best leaders and managers do? Gallup courses are designed to help leaders and individual contributors maximize their own performance and that of their teams. The following are examples of Gallup's most commonly offered courses in higher education institutions nationally. Gallup has provided a detailed list of these, and other courses, offered by Gallup in the cost proposal section.

CliftonStrengths Discovery

Gallup believes your best life begins when you apply your unique talents. Discover how to identify your greatest talents and maximize your potential by attending the CliftonStrengths Discovery: Your Unique Strengths course. Go beyond an awareness of your strengths by developing your talents and applying them in your work and life. Understanding one's natural talents is just the beginning of the strengths discovery journey. This half-day course takes leaders beyond a foundational awareness of their strengths to help identify ways to intentionally invest in their innate talents and apply them in their work and life. This transformative course changes the way leaders work and live their life. Leaders will learn how to identify what they do best and maximize their potential using their CliftonStrengths.

During this course, leaders will:

- discover how to make a difference by doing more of what they naturally do best
- get insights into their innate talents by working with their CliftonStrengths 34 results report
- learn how to develop their greatest talents into strengths
- acquire tools and insights that will help them apply their strengths to achieve greater productivity, engagement and happiness

Creating and Engaging Workplace for Champions or Managers

This course will equip engagement champions and managers with knowledge and strategies for creating an engaging culture by promoting engagement, offering advice, collecting best practices and supporting managers' engagement efforts. Engagement champions can be HR team members, business partners, respected leaders or managers, or individual contributors who demonstrate enthusiasm for creating an engaging work environment.

During this course, engagement champions and managers will learn how to:

- promote and advocate for workplace engagement
- guide managers through the engagement process over time
- provide ongoing support to managers throughout the year
- empower managers to take the necessary steps for creating engaged teams
- provide developmental and consulting conversations

Building Accountability for Engagement Course for Managers

This course incorporates findings from Gallup's extensive, ongoing research into how managers build and maintain high levels of engagement and performance by understanding their team's trending data and through frequent and meaningful conversations.

During this half-day course, managers learn how to:

- hold their teams and themselves accountable to engagement goals and objectives
- how to conduct state of the team conversations that are focused and solicit an impactful action plan
- how to develop an action plan in partnership with their team members

One-on-one coaching

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Multiple methods exist to develop leaders, such as on-the-job experience, assessments and feedback, mentoring, courses, inclusion on special projects and coaching. One-on-one coaching at the leadership level offers the most dedicated, accountable approach to optimize and sustain individual and team performance. Leaders with a commitment to coaching can expect to see improved results in addressing challenges, enhanced thinking and decision-making skills, interpersonal effectiveness, engagement and increased confidence. Expert executive coaches can specifically focus leaders on driving performance individually for the team and organization through a thought-provoking and creative process that inspires leaders to maximize their potential.

Gallup has studied leadership for over 70 years, completing leadership research with more than 75,000 leaders in over 200 diverse organization industries. With over 33,000 coaching sessions in the past five years, Gallup brings a scientific approach, based on leadership coaching research, to each coaching program.

Gallup coaches collaborate with some of the world's most successful leaders at some of the largest colleges and universities nationally. Gallup coaches are distinguished by their ability to facilitate individual and group processes that tie to performance objectives and key metrics. As experts, Gallup coaches use powerful questions and provide actionable feedback to create quick, sustainable and measurable results. Coaching with Gallup is an individualized leadership development process that will expand leaders' range of talent and enable them to achieve short- and long-term institutional goals.

Though many executive coaches strictly act as counselors, Gallup coaches can serve as both coaches *and* consultants, providing leaders individualized feedback and advice they can apply in working with colleagues and directly with students. Gallup coaches act as both sounding boards and strategic partners who understand organizational data, including Gallup employee engagement data, and can offer data-driven advice to help leaders address their business challenges and realize their greatest potential in the workplace. s

Gallup coaching sessions are private, one-on-one, confidential and highly personalized conversation directed at goals, challenges and priorities in a neutral space free from distractions and pressures. Gallup will work with the Virginia Tech team to identify the ideal cadence of coaching sessions per leader over time. Gallup has provided the investment per coaching session in the Cost Proposal provided. See the appendix for biographies for each of the three coaches recommended for Virginia Tech.

Student Culture and Climate Surveys

For decades, Gallup has partnered with individual universities to survey their currently enrolled students to inform the University's priorities and identify relative strengths and opportunities as compared with the college experience nationally.

3. Vendor Account Manager

The Gallup vendor account manager is Stephanie Marken. Marken leads Gallup's education research division and will be responsible for all aspects of the Virginia Tech-Gallup relationship, including contractual and performance concerns. Marken will serve as the principle point of contact during the performance of this contract, as she has done for the prior contracting period with Virginia Tech, and her contact information is as follows:

Stephanie Marken
stephanie_marken@gallup.com
(o) 202-715-3084
(m) [REDACTED]
901 F Street NW Suite 200
Washington, D.C.
20004

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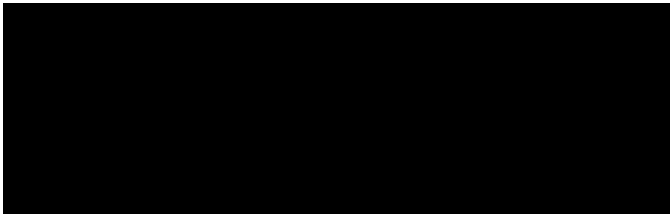
A resume for Marken is provided as an appendix to this response. Gallup will notify Virginia Tech if the vendor account manager changes.

Gallup is not currently planning on engaging any subcontractors to perform the work specified under this proposal, and thus no subcontractor vendor managers are identified. Any subcontractor identified during the contractual period will be shared with Virginia Tech in writing for approval.

4. Client References

Gallup works with hundreds of colleges and universities to provide the type of organizational consulting described in this proposal. Below, Gallup shares three references for relevant projects it is currently engaged in.

INDIANA UNIVERSITY SYSTEM



In 2017, Gallup began partnering with the Indiana University (IU) system, a multicampus public university system, to conduct a comprehensive employee experience survey of 15,000 members of IU staff across seven campuses supporting the educational mission of the institution. IU's objective was to establish a baseline to compare itself to best practice organizations and build actions to enhance the employee experience, with the plan of resurveying over time to evaluate progress. IU uses Gallup's proprietary Q¹² index to measure employee engagement along with several questions capturing equity and inclusion within the institution as a mechanism for continuous measurement to develop supervisors, build an HR strategic plan for change based upon survey results and leverage the results to create an employment value proposition to attract top talent to IU.

Gallup conducted the first of three planned measurements by administering its proprietary Q¹² survey in September 2017, a second survey in 2019 and a third measurement in 2021. Gallup is currently planning for its fourth measurement in 2023. In each of these administrations, Gallup's team collaborated with IU's project team, determining additional survey items to meet IU's data capture goals, creating an organizational structure map to guide the creation of relevant, actionable data reporting, and outlining a communication framework and tools based on Gallup's best practice experience.

After data collection, Gallup presented an in-depth analysis of engagement results and trends to IU leadership to assist executive-level decision-making. Data and reports for each campus were generated and uploaded onto an online reporting platform for leaders and managers to easily retrieve. The reporting platform included a variety of tools for viewing and manipulating the data, as well as identifying recommended action steps. Each workgroup across all campuses and divisions that had five employees complete the survey received its own results and report so that it could begin an action planning process to establish focused goals and priorities and make progress toward the next survey administration.

GEORGE MASON UNIVERSITY

Employee Engagement Program



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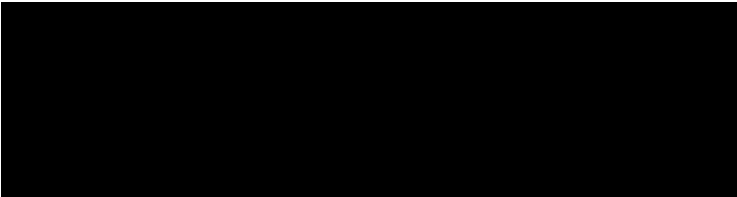


In 2021, GMU embarked upon a three-year partnership with Gallup to quantify and improve institutional culture and engagement for its more than 5,000 employees. The program is designed to help GMU identify its strengths and opportunities for improvement across a series of aspects of the employee experience, including DEI, institutional trust, collaboration, engagement, wellbeing and burnout.

In its first annual administration, Gallup conducted 18 stakeholder interviews to better understand the context in which the survey was being conducted. Gallup interviewed this diverse set of stakeholders using an open-ended discussion guide designed by Gallup researchers. Next, Gallup partnered with the GMU team to develop a draft survey that addressed the constructs covered during these conversations. Gallup then drafted equivalent survey items to address these constructs, in some cases relying upon its proprietary database so that GMU could compare itself to a national benchmark. Questions covered engagement (using Gallup's proprietary Q¹² index); employee belonging; confidence in reporting mechanisms designed to identify unethical behavior; safety to speak; perceived value; perceived equity and fairness in advancement/promotion decisions on the basis of gender, sexual orientation, race, ethnicity and other demographic differences; and the extent to which employees were treated with respect. All questions were tested for item relevancy and construct validity prior to launch. Results were analyzed among departments, roles, racial and ethnic groups, genders and other demographic characteristics to quantify differences in the lived employee experience.

Gallup is currently partnering with the institution to conduct a faculty-specific survey that will launch in April of 2023. In 2024, Gallup will re-administer the survey conducted in 2022 to measure change over time on a series of important metrics including engagement, diversity, equity and inclusion, wellbeing and burnout, among others.

NEW JERSEY INSTITUTE OF TECHNOLOGY



In 2022, Gallup began partnering with the New Jersey Institute of Technology to measure employee engagement at the institution. Gallup is currently engaged in a multi-year partnership to assess and help improve faculty and staff engagement at this large, public polytechnic university.

As a part of this partnership, Gallup is responsible for all aspects of the survey design, programming, data collection, analysis and reporting activities. In this first annual administration, Gallup surveyed 833 full-time faculty and staff from Nov. 7-Nov. 21, 2022. The survey leveraged Gallup's proprietary Q¹² index to determine the percentage of faculty and staff who are engaged, not engaged or actively disengaged, and the areas in which they could most use support. At the analysis and reporting phase, Gallup presented results to several University audiences, including the President's Cabinet, NJIT faculty and staff leaders, and the Faculty Senate. NJIT is currently using the Gallup Access platform to scale insights to all managers and leaders throughout the institution and begin engaging in action planning.

Results from this research will inform a University-wide action plan, as well as local action planning throughout the institution.

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5. Cost Proposal

Below, Gallup provides the costs associated with conducting a full-scale employee engagement survey at the University inclusive of the following deliverables. Gallup has also provided pricing for the Gallup Access platform for the purposes of managing.

TABLE 1. GALLUP ENGAGEMENT SURVEY AND ACCESS PLATFORM SUPPORT AND INVESTMENT

Activity	Investment
Annual engagement survey, inclusive of the following services: <ul style="list-style-type: none"> • Project management to ensure alignment between Gallup-VT teams • Stakeholder interviews to align on the survey topics VT would like to include in the survey • Survey design, leveraging Gallup’s established indexes/items, as relevant to VT • Data collection with a census of all employees provided in the VT list • Access to the Gallup Access platform which includes: <ul style="list-style-type: none"> ○ Automated reporting functionality, including workgroup-level results ○ Unlimited pulsing (on a self-service basis) ○ Access to Gallup’s action planning tool ○ Access to the advanced data tool ○ Access to the Gallup resource library inclusive of learning and development resources for the organization • Executive presentation delivered to institutional leadership by Gallup subject matter experts (in-person or virtual) 	\$132,700
Access to the Gallup Access platform for a 12-month period which includes: <ul style="list-style-type: none"> • Automated reporting functionality, including workgroup-level results • Unlimited pulsing (on a self-service basis) • Access to Gallup’s action planning tool • Access to the advanced data tool • Access to the Gallup resource library inclusive of learning and development resources for the organization • Ability to merge CliftonStrengths results into the platform for the purpose of purchasing and distributing codes while accessing strengths learning and development resources 	\$51,300
Add Gallup’s onboarding and exit package so that Virginia Tech can survey employees throughout their employment journey at the University. These costs are assessed in addition to the Access platform fee.	10-99 employees: \$4/person 1,000-4,999 employees: \$3/person 5,000+ employees: \$15,000

Gallup offers a series of learning and development resources to support faculty, staff and student development. Table 2 includes the relevant learning and development resources that will support Virginia Tech as it continues in its mission to be an inclusive community of knowledge, discovery and creativity that improves quality of life throughout Virginia and the world.

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TABLE 2. LEARNING AND DEVELOPMENT RESOURCES

Resources	Investment
<i>CliftonStrengths Assessment tools</i>	
CliftonStrengths Assessment for students — top-5 code	1-9 codes: \$19.99 10-99 codes: \$15.99 100+ codes: \$13.99 500+ codes: \$12 (contract only and requires \$1,500 subscription fee)
Upgrade to CliftonStrengths for students — full 34 code	\$40/code
CliftonStrengths Assessment for faculty and staff — full 34 code	\$59.99/code
CliftonStrengths Discovery half-day course: This course will take participants beyond a foundational awareness of their strengths to help them identify ways to intentionally invest in their innate talents in their work and life.	\$9,500 (virtual) \$13,000 (in-person)
Gallup Global Strengths Certification (4.5 days) for single employee	\$4,620
Gallup Global Strengths Certification (4.5 days) for up to 24 employees	\$75,000
CliftonStrengths for Students Champions Course (6 hours)	\$8,500
<i>Manager/Leader workplace tools</i>	
Creating an Engaging Workplace for Champions half-day course: This course incorporates findings from Gallup’s extensive, ongoing research into how managers and teams build and maintain high levels of engagement. The course provides managers with insights into how they can increase productivity and success by working with a focus on engagement.	\$9,500 (virtual) \$13,000 (in-person)
Building Accountability for Engagement Course for Managers half-day course: This course incorporates findings from Gallup’s extensive, ongoing research into how managers build and maintain high levels of engagement and performance by understanding their team’s trending data and through frequent and meaningful conversations.	\$9,500 (virtual) \$13,000 (in-person)
Driving Employee Engagement for Managers webinar: This 55-minute webinar explores the foundation of employee engagement, including understanding, measuring and creating engagement.	\$2,500
Gallup Unconscious Bias and Inclusion Workshop: The course provides managers with advanced insights into how they can understand and manage unconscious biases. This course offers strategies to help managers recognize biases in order to reduce their negative effects on the job.	Half-day: \$9,500 (virtual) \$13,000 (in-person) Full-day: \$13,000 (in-person or virtually)
Creating a Thriving Culture of Wellbeing for Managers webinar: This 90-minute, interactive workshop reveals how leaders and managers can improve mental health and wellbeing in the workplace, creating resilient teams equipped to thrive now and in the future.	\$2,500
Boss to Coach Journey part 1 or part 2 for up to 24 participants	\$30,000
Boss to Coach Journey (parts 1 and 2) for up to 24 participants	\$60,000
Other half- or full-day courses offered across Gallup’s workplace practice areas	Half-day: \$9,500 (virtual) \$13,000 (in-person) Full-day: \$13,000 (in-person or virtually)
<i>Student-facing leader courses</i>	
CliftonStrengths for Students Mentoring & Advising (2 Days) for up to 24 participants	\$24,000
CliftonStrengths for Students Leaders (2 Days) for up to 24 participants	\$24,000

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TABLE 3. EXECUTIVE COACHING OPTIONS AND RELATED PRICING

Standard Coaching Package <ul style="list-style-type: none"> • One 30-minute intro/prep call • Six one-hour coaching calls • One 30-minute debrief/planning call Total: 7 hours	Total: \$3,500/coaching package per executive
In-Person Coaching	\$4,000 per day + travel expenses
Team Session	\$4,000 per day + travel expenses

Gallup will work with Virginia Tech as opportunities arise to identify the right team member for the project based on their unique skills, background and areas of expertise. Table 4 contains hourly costs for Gallup associates employed at various levels within the organization based on their years of experience and education level. Virginia Tech can contract a retainer of hours to be drawn down over time. Or it can the University can share the details of a project, at which time Gallup will allocate hours by level for that project to arrive at a final cost proposal.

TABLE 4. CONSULTING LEVEL, ROLE AND HOURLY RATE

Level and role	Hourly rate
Project coordinator supporting administrative tasks and project management activities	\$190
Implementation analyst facilitating survey programming and related operations activities	\$190
Level 1: Implementation lead and project management support	\$230
Level 2: Account lead	\$360
Level 3: Senior researcher and subject matter expert	\$475
Level 4: Senior subject matter expert	\$600

6. Capacity and Readiness to Perform Service and Deliverables as Described

Gallup maintains approximately 1,200 employees across its offices throughout the U.S., including in Gallup's global headquarters in Washington, D.C., operations headquarters in Omaha, NE, and offices in Atlanta, GA and Chicago, IL, in addition to remote home offices. These employees include learning and development designers, executive and leadership coaches, methodologists and survey design experts, employee experience subject matter experts, social science researchers, programmers, technology specialists, editors and designers. Gallup maintains employees with relevant experience across the various stages of potential projects in which Gallup would engage with Virginia Tech, ensuring a breadth of expertise and necessary capacity should the University choose to conduct multiple projects concurrently.

Gallup currently partners with thousands of organizations globally to conduct employee experience, leadership and workforce development projects. These clients include hundreds of universities, foundations and agencies with which Gallup is partnering to conduct work relevant to the higher education faculty, staff and student experience, including but not limited to:

1. **Employee engagement surveys** with hundreds of universities measuring engagement among faculty and staff campus-wide or among departments
2. **Culture and climate studies**, including recent partnerships measuring free speech at institutions like the Indiana University System²

² Indiana Commission for Higher Education. (2022). Free speech survey launching on college campuses April 5 [Press release]. https://www.in.gov/che/files/220404_RELEASE_Free-Speech-Survey.pdf

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3. **Currently enrolled student surveys** measuring the factors impacting student retention and academic performance
4. **Implementation of CliftonStrengths** among students, faculty and staff members; in the fall of 2023, approximately 25% of incoming first-year students will take the CliftonStrengths assessment
5. **Custom research programs** such as thought leadership studies in partnership with foundations, agencies and organizations committed to understanding the state of postsecondary education, including the annual Lumina Foundation-Gallup State of Higher Education study³

Gallup will bring this depth of knowledge about education to its partnerships with Virginia Tech.

Gallup will be prepared to begin work 24 to 48 hours following statement of work completion with Virginia Tech.

7. Participation of Small, Women-owned and Minority-owned Business (SWAM Business)

Gallup understands that the mission of the Virginia Tech supplier opportunity program is to foster inclusion in the university supply chain and accelerate economic growth throughout the State, particularly among small, minority-owned and women-owned local businesses. Gallup is committed to working with these small businesses in a subcontractor capacity. Gallup frequently subcontracts with firms who provide specific expertise outside of its core competencies so it can offer clients the latest best practices required by the industry. Subcontracting to specialized industries such as research and survey services, temporary support staff, technology services and delivery services allow Gallup's business to function at an expected pace. A leader in research and management consulting, Gallup continues to make a good faith effort to source and subcontract to small, small disadvantaged (including ANC and Indian tribes), small women-owned, small HUBZone business, small veteran-owned and service-disabled veteran-owned small business concerns when subcontracting opportunities exist. Subcontracting in these areas enhances its company by bringing new talent and ideas and/or by providing services in areas that Gallup does not service.

Gallup sources small business concerns by using the SBA's Dynamic Small Business Search, evaluating NAICS and SIC codes, reviewing small business websites and researching core competencies. Gallup also meets with small business owners and reviews corporate capability statements. In addition, Gallup maintains small business vendor sourcing lists and will incorporate existing small business relationships under this small business subcontracting plan where subcontracting opportunities exist. A Gallup Program Administrator will integrate these new capability qualification efforts into current business processes and partnership activities.

Gallup identifies potential subcontractors using the following source lists and organizations:

- Commercial Market Representative, Small Business Administration
- Dynamic Small Business Search
- The National Minority Purchasing Council's Vendor Information Service
- The Department of Commerce/Minority Business Development Agency's Research and Information Division
- Various small businesses; small, disadvantaged business (including ANC and Indian tribes); women-owned small; HUBZone small, and service disabled, veteran-owned small business trade associations; and existing company source lists

Potential allocation of work is determined by the optimal blending of prime and subcontractor capabilities. Gallup has not identified any subcontracting needs at current time but will continue to revisit those needs as

³ Lumina Foundation and Gallup.(2023). *Balancing act: The tradeoffs and challenges facing Black students in higher education.*
<https://www.gallup.com/analytics/468986/state-of-higher-education.aspx>

Gallup Response to RFP567142306
Virginia Tech University

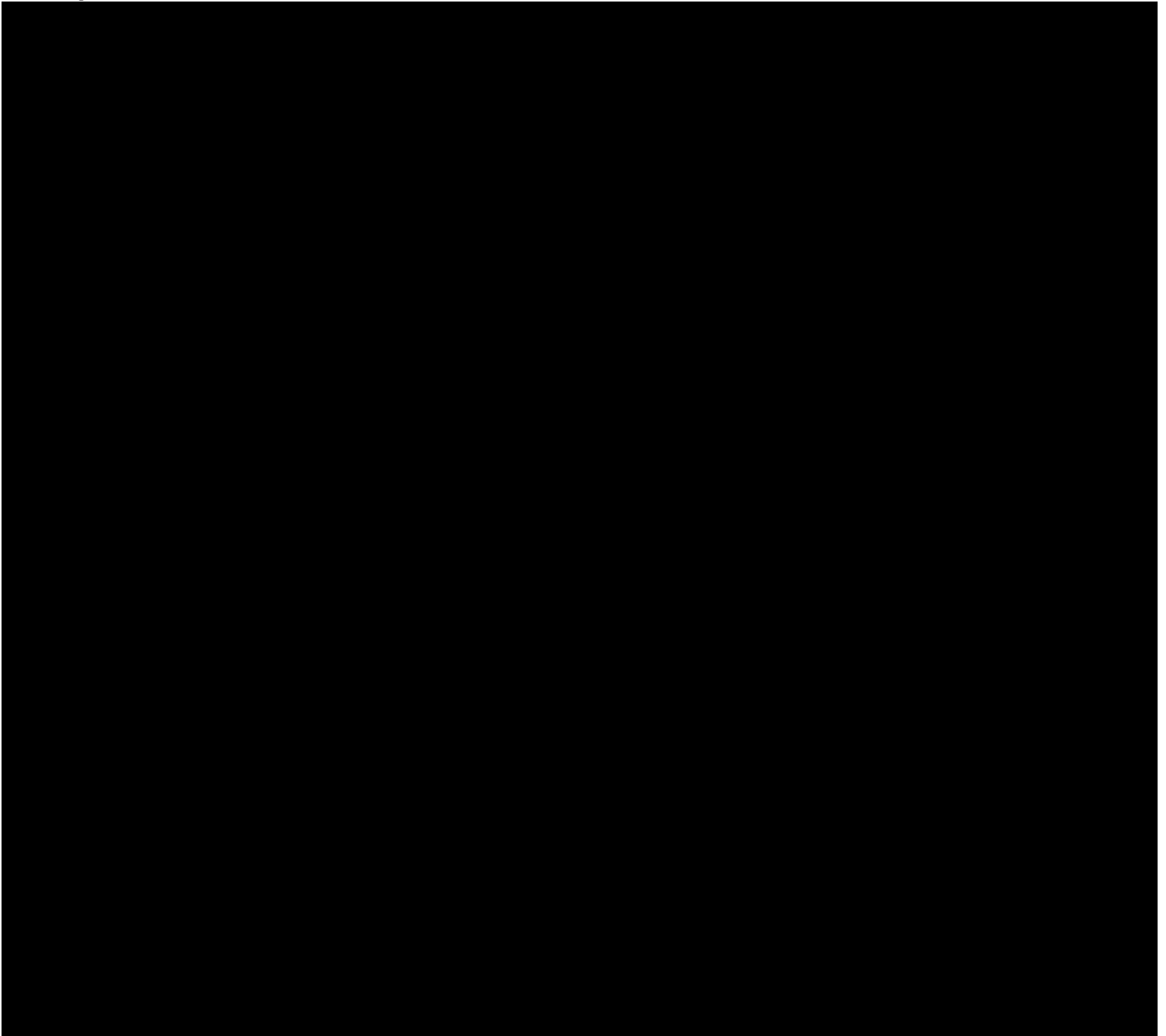
the Virginia Tech identifies specific projects in which it would like to engage with Gallup. Gallup will prioritize identifying small, women-owned and minority-owned businesses in this process to align with Virginia Tech's overall goals.

8. Return of the General Information Form and Addenda, if any

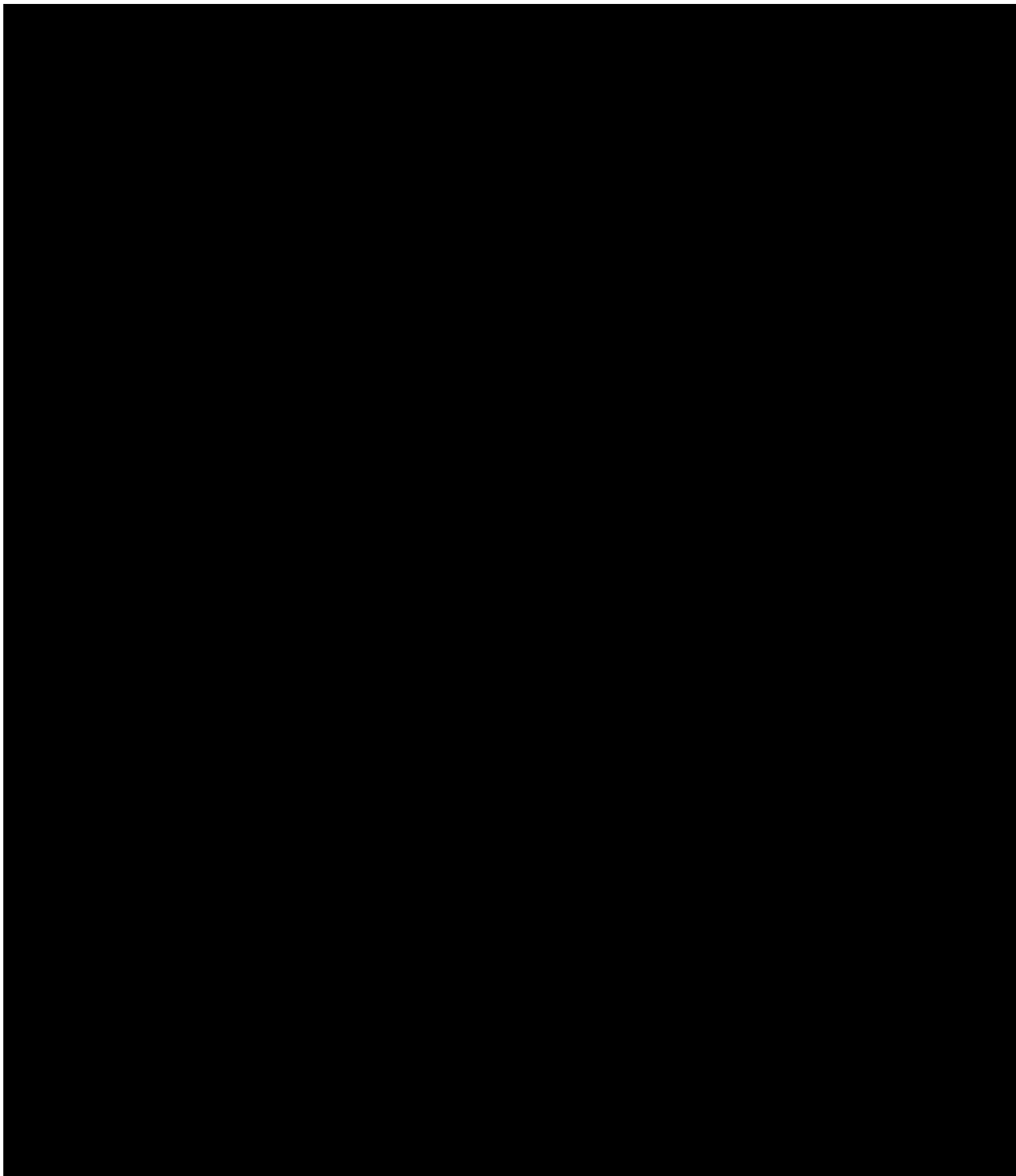
Gallup has provided the general information form and addenda via pdf in the platform.

Appendix

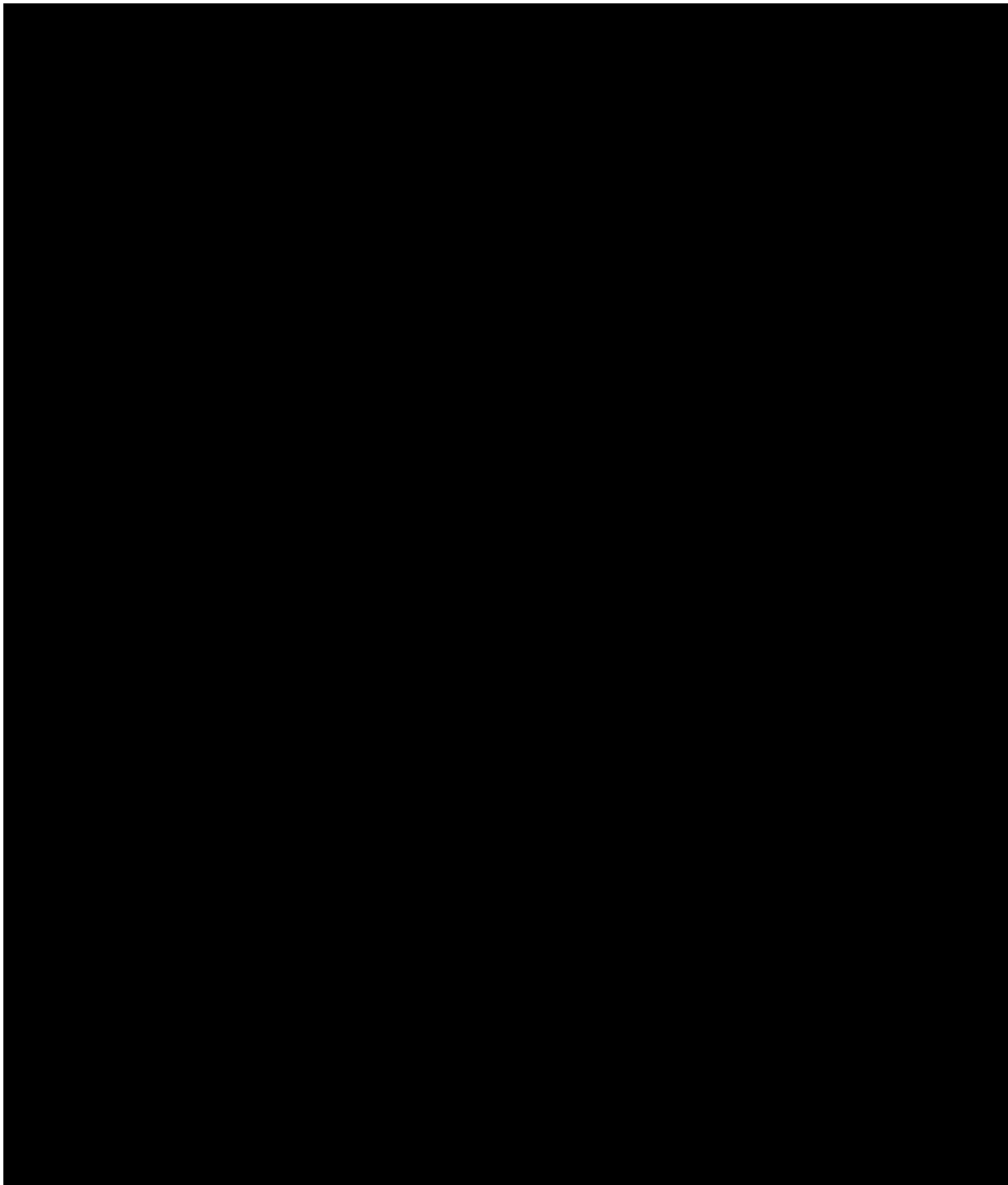
Stephanie Marken



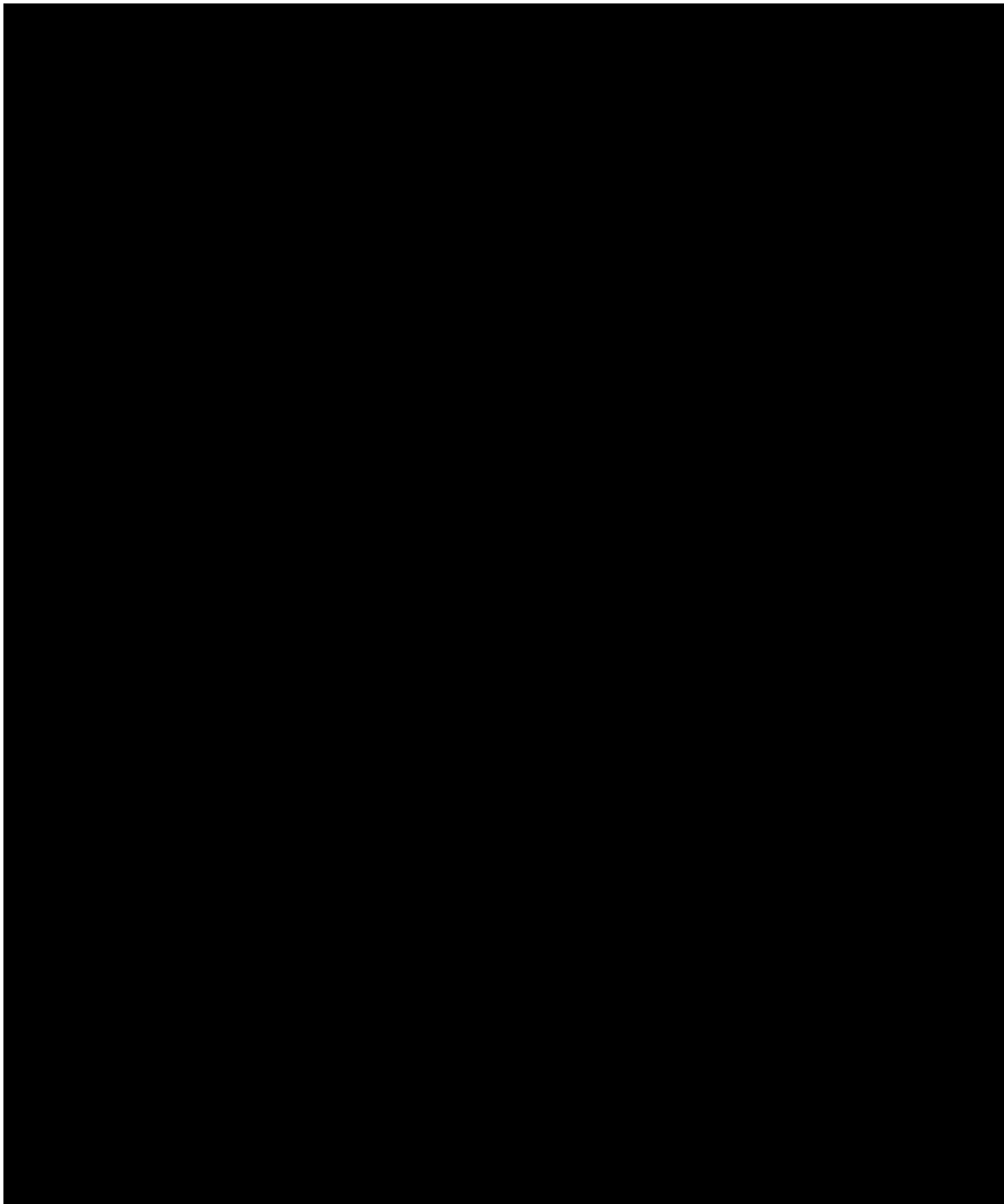
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Virginia Tech University



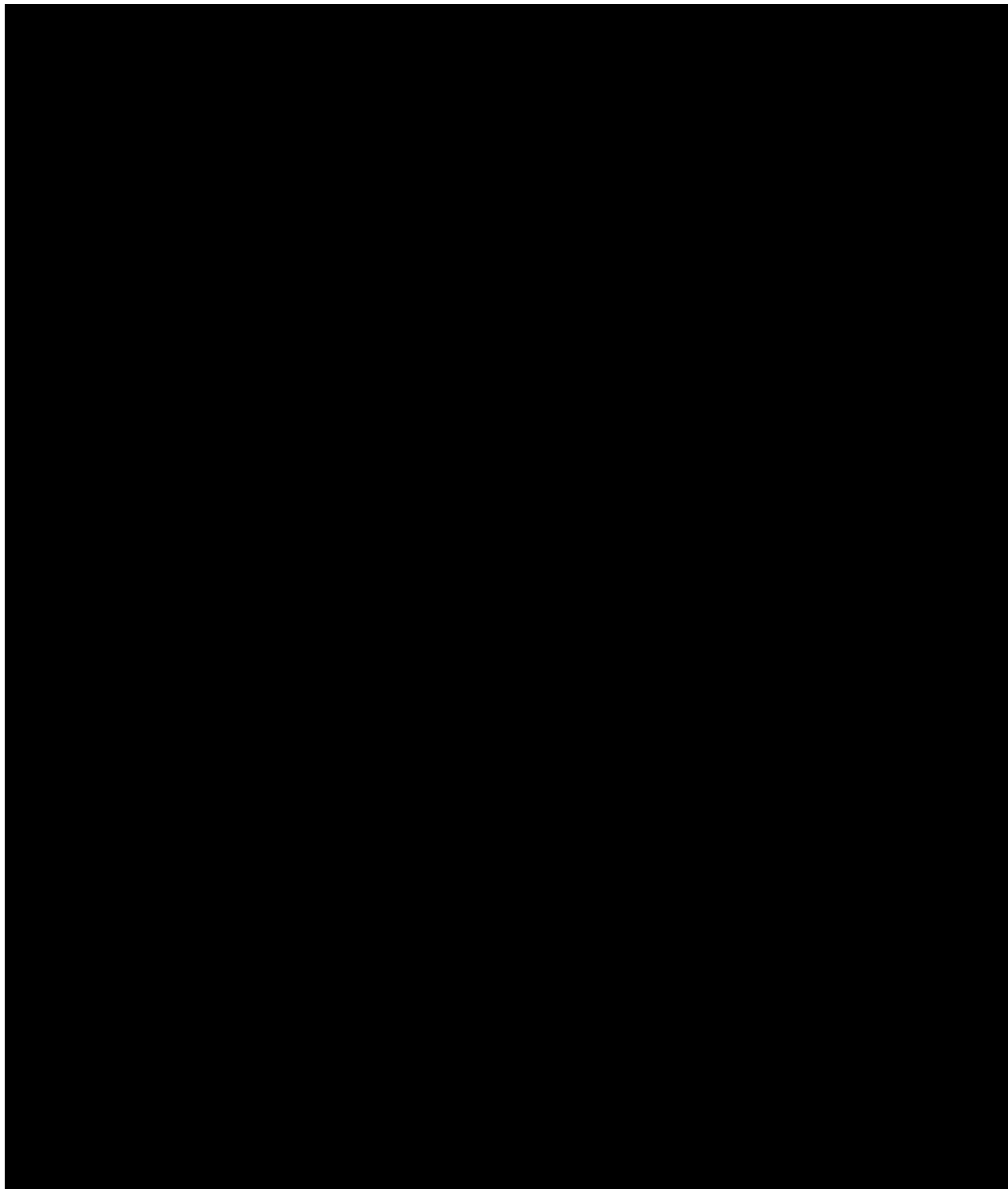
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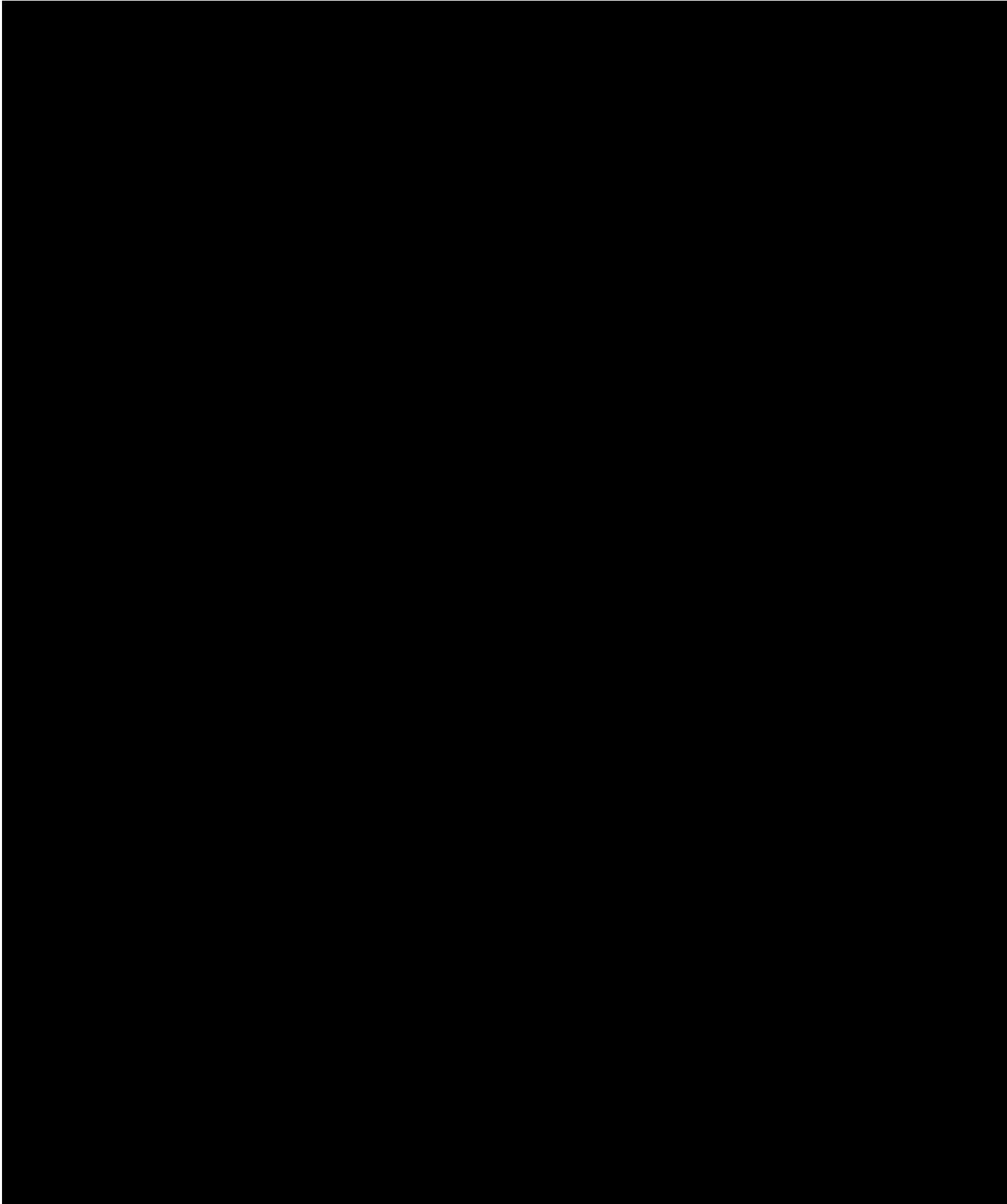
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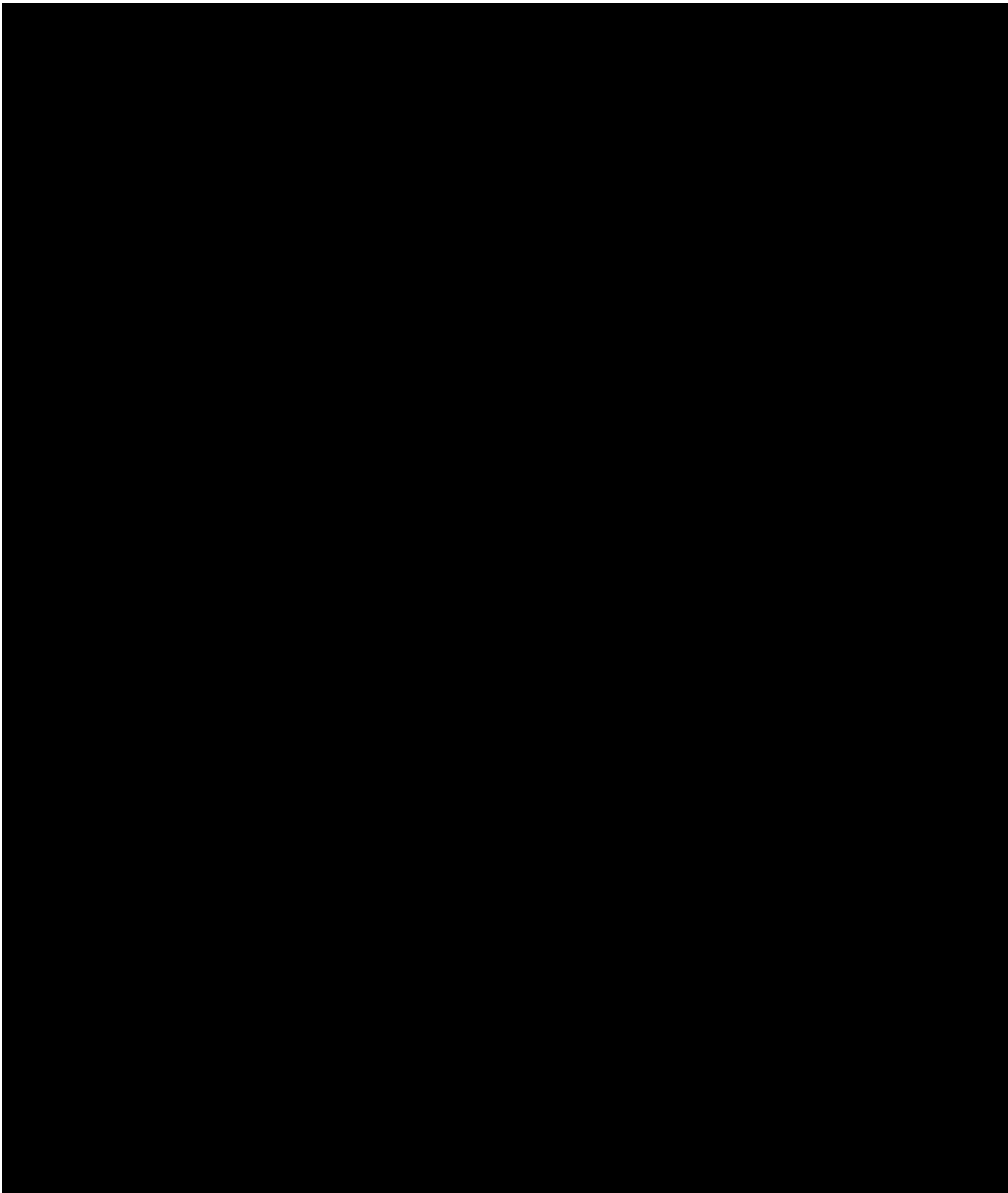
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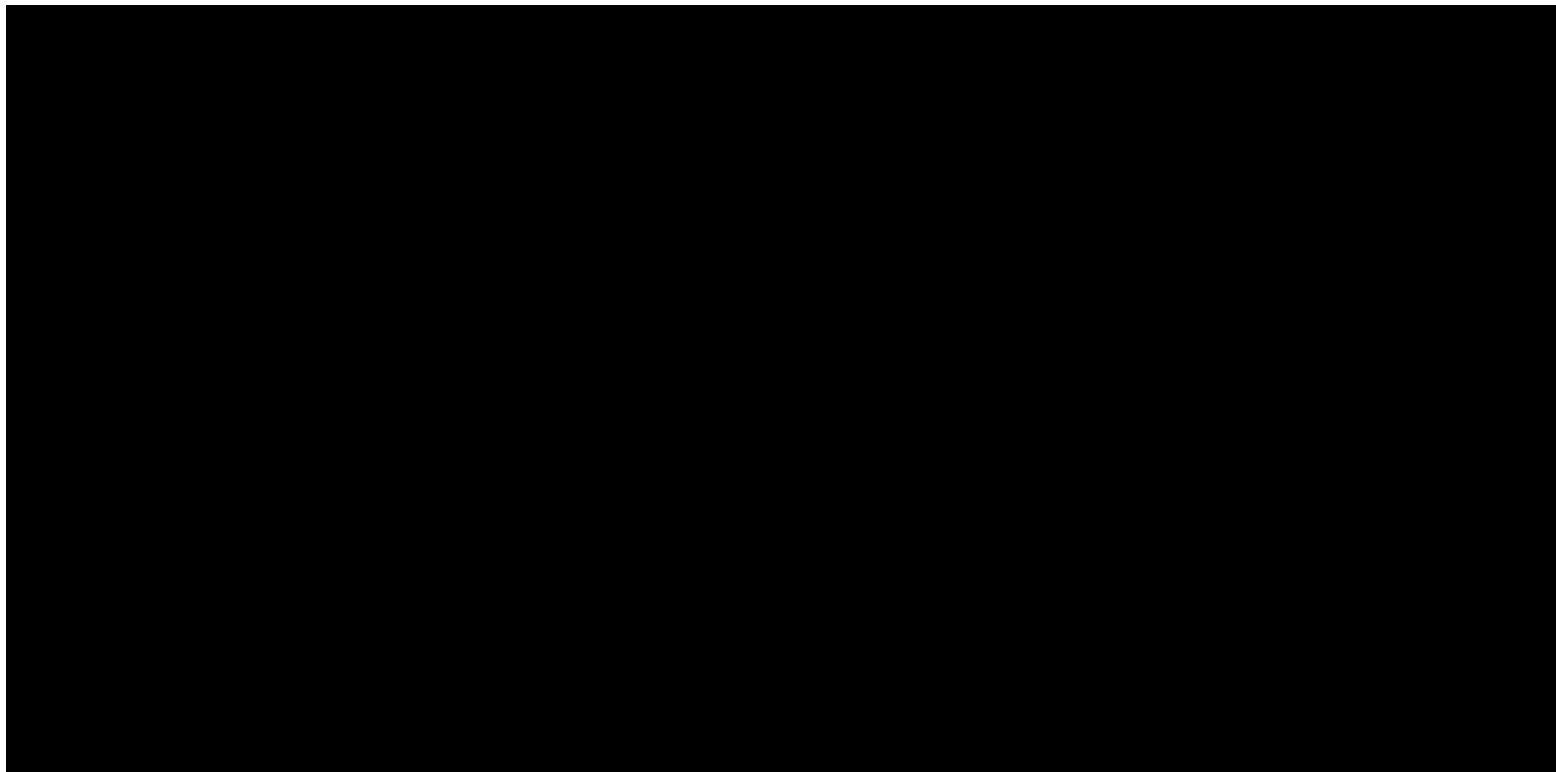
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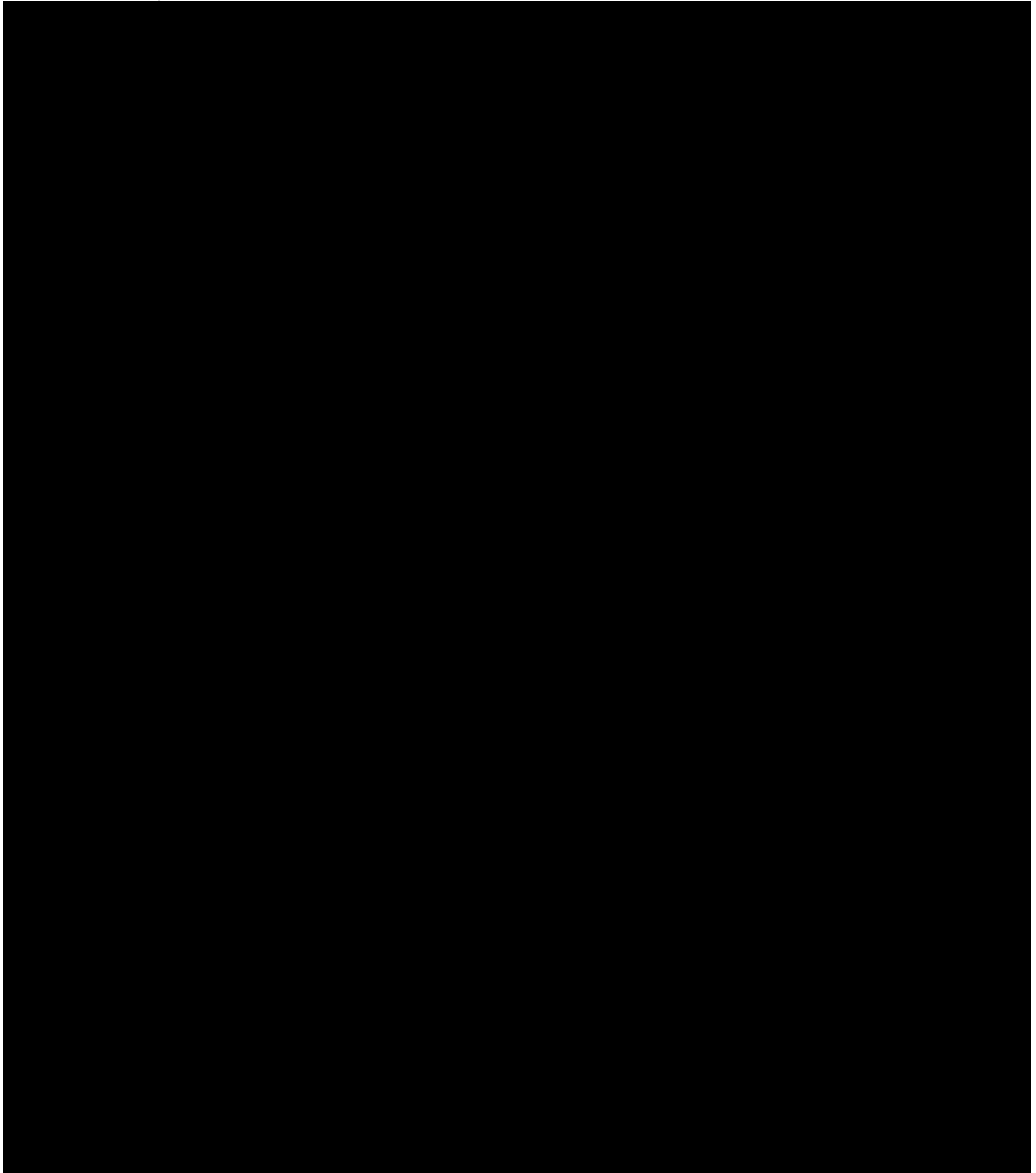


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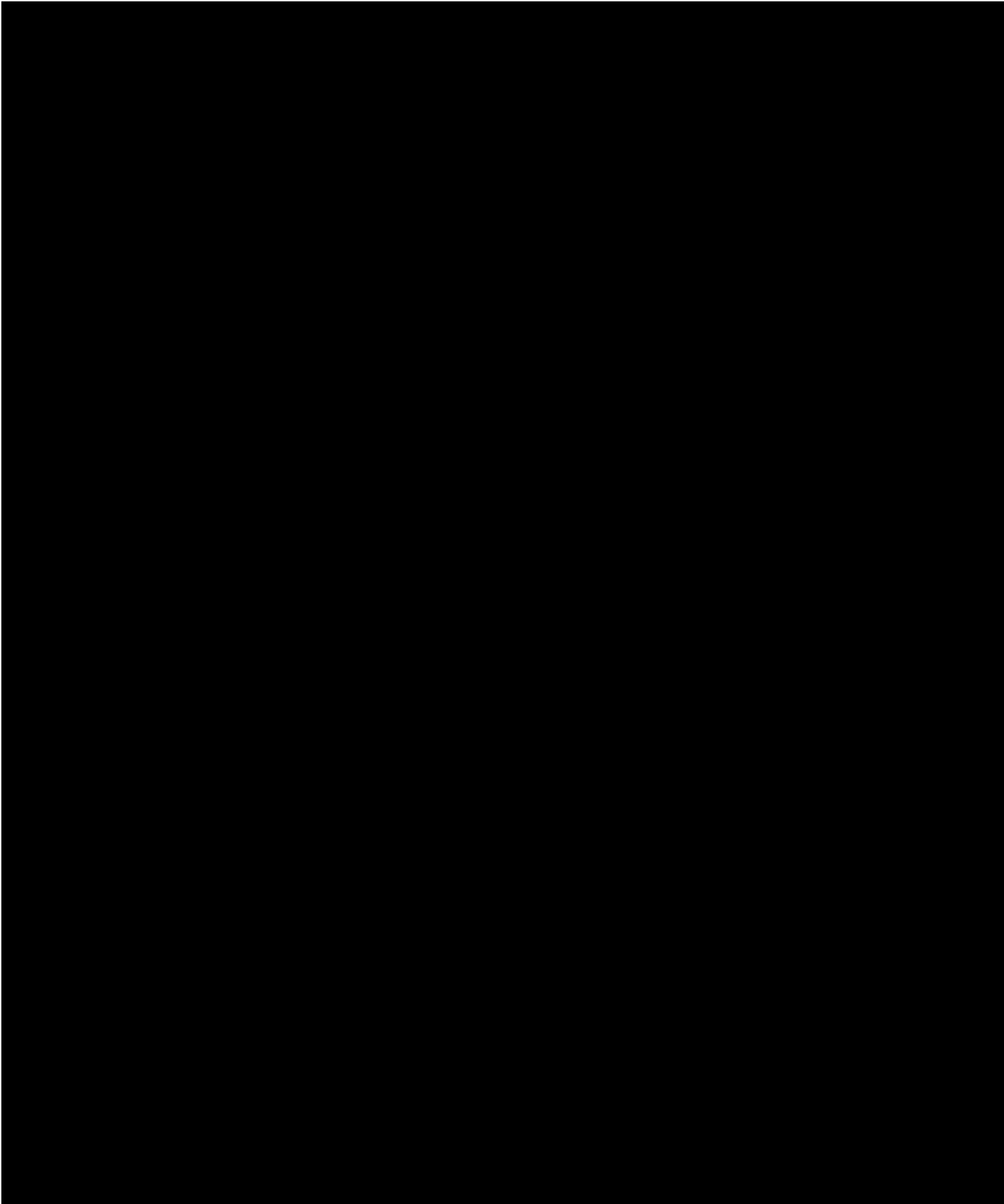


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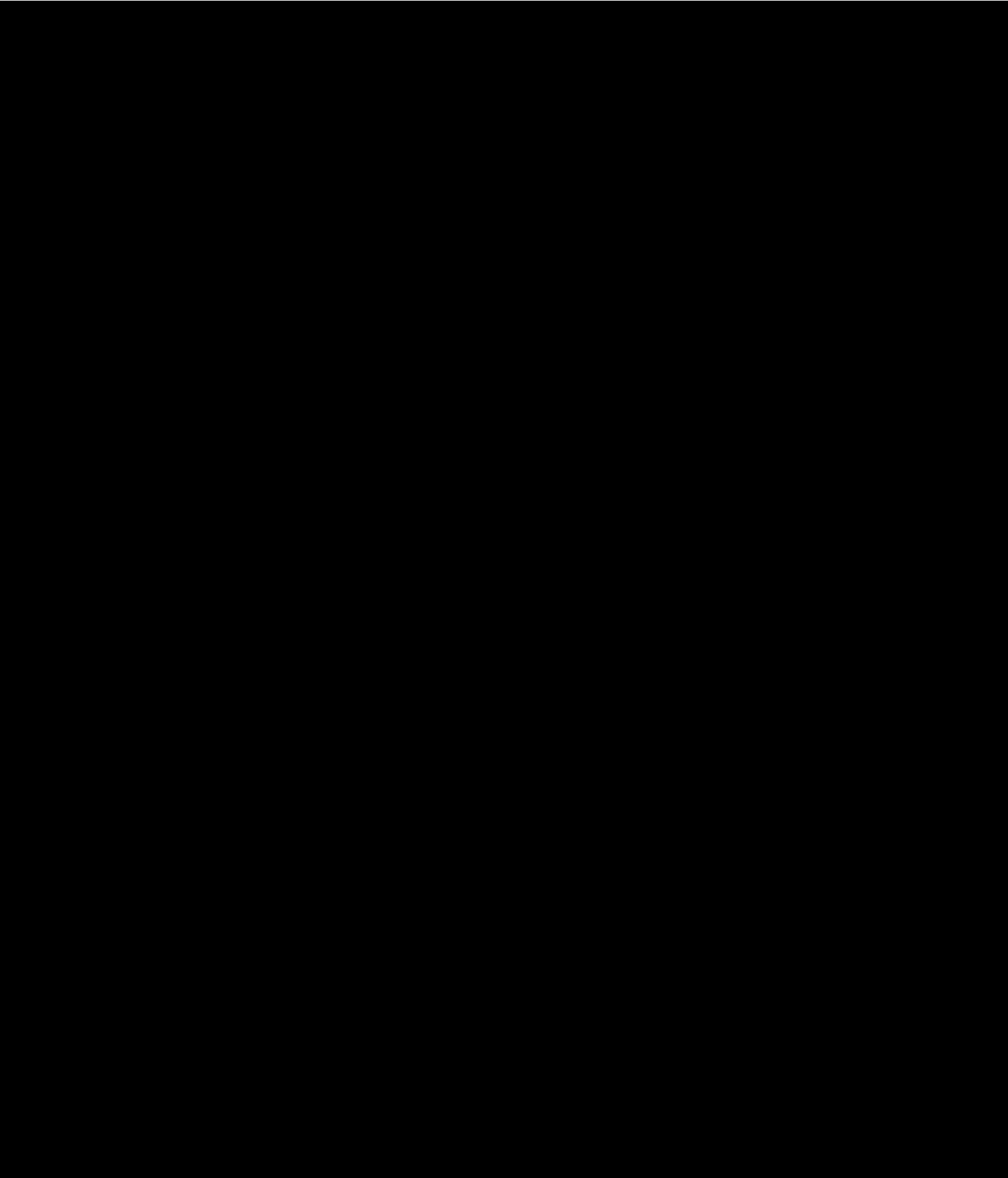
Camille Lloyd



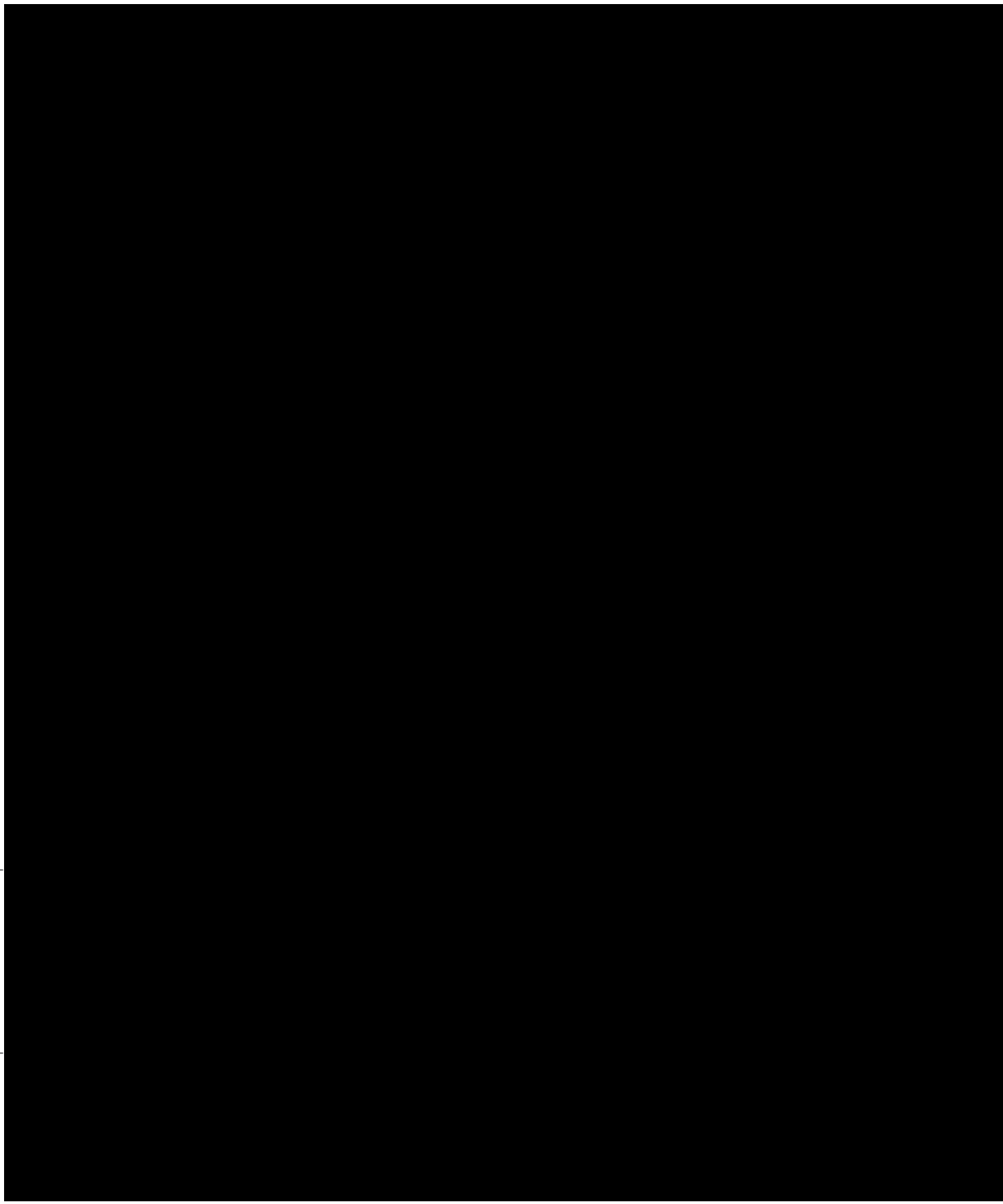
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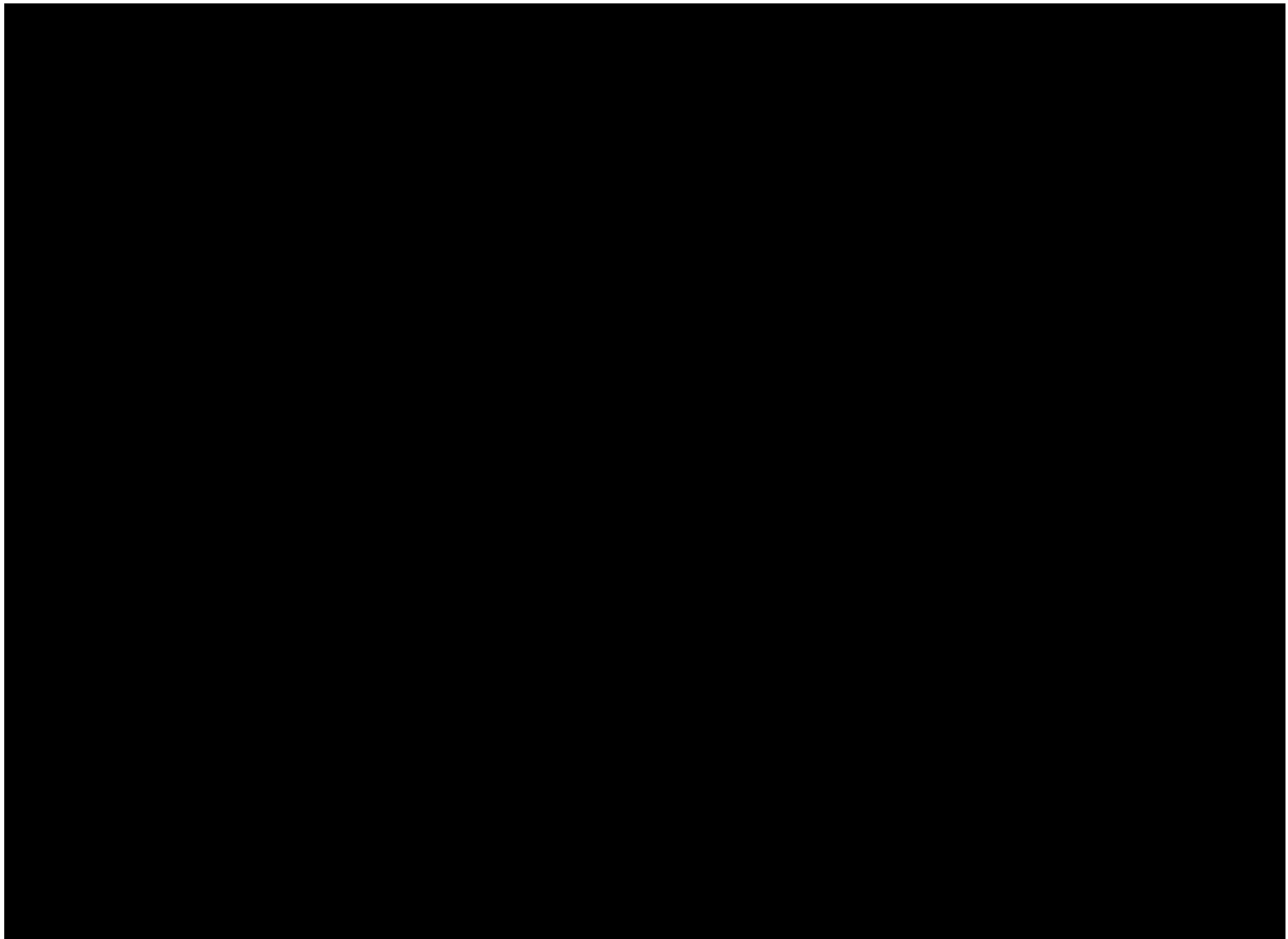
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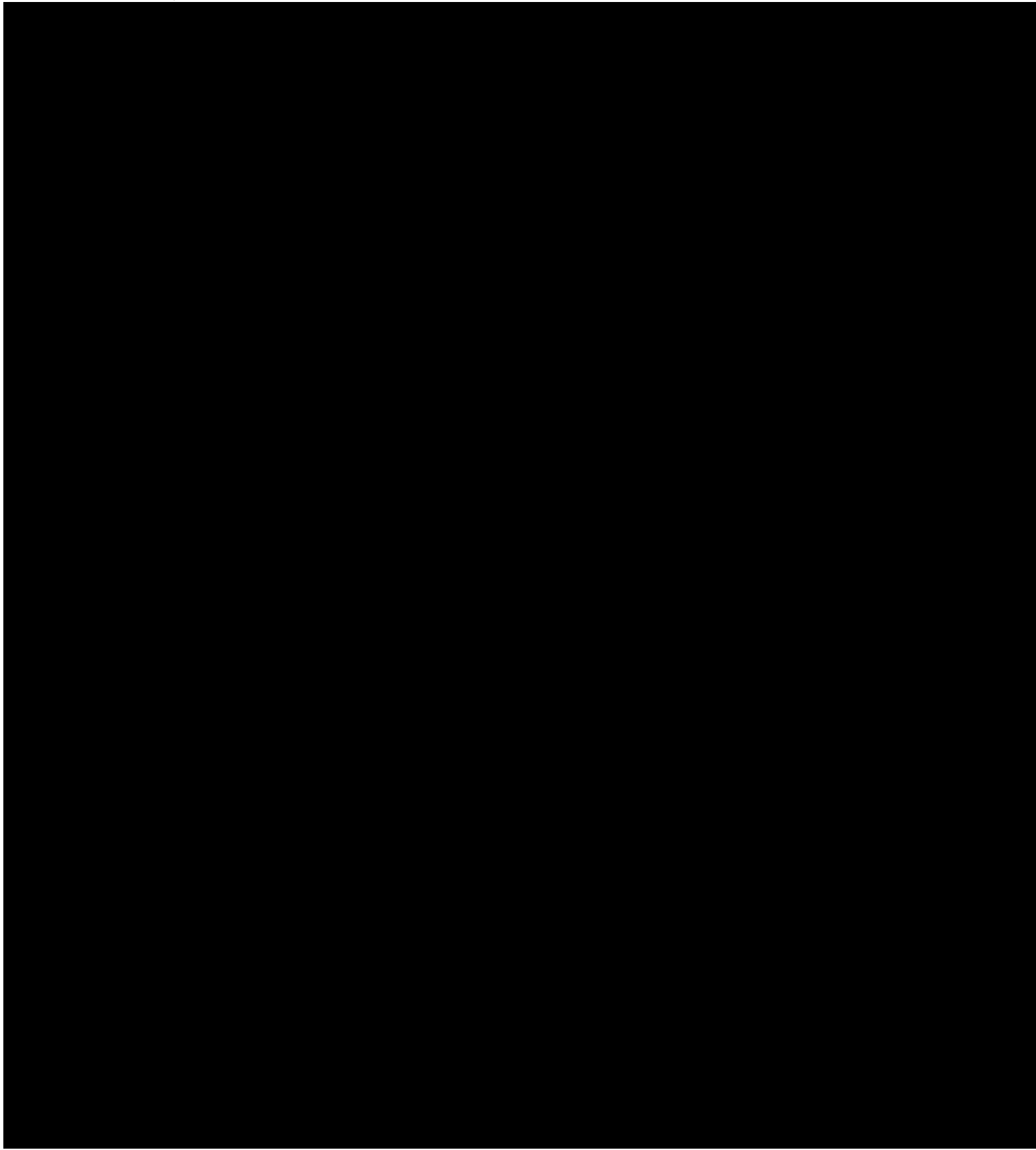


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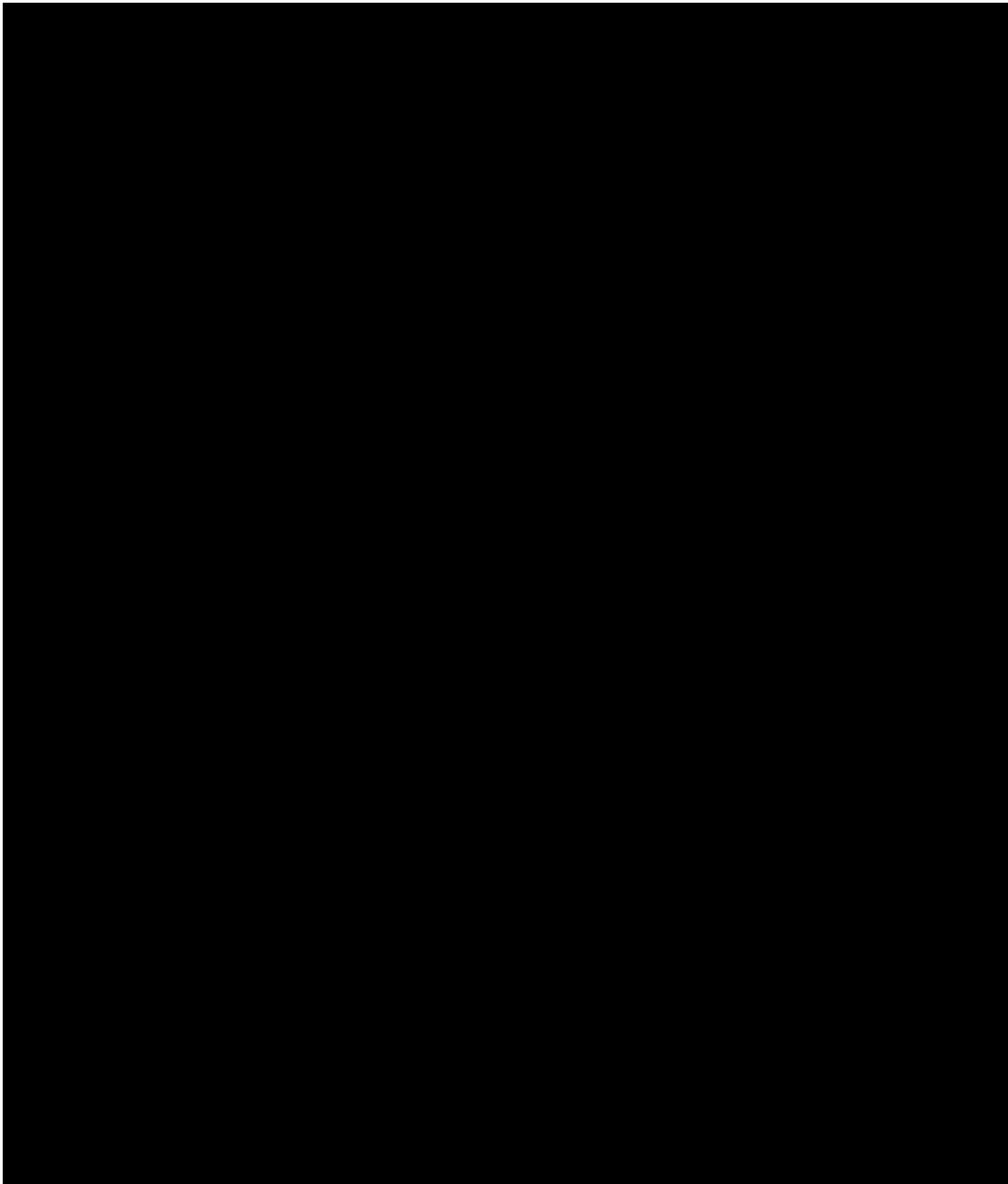


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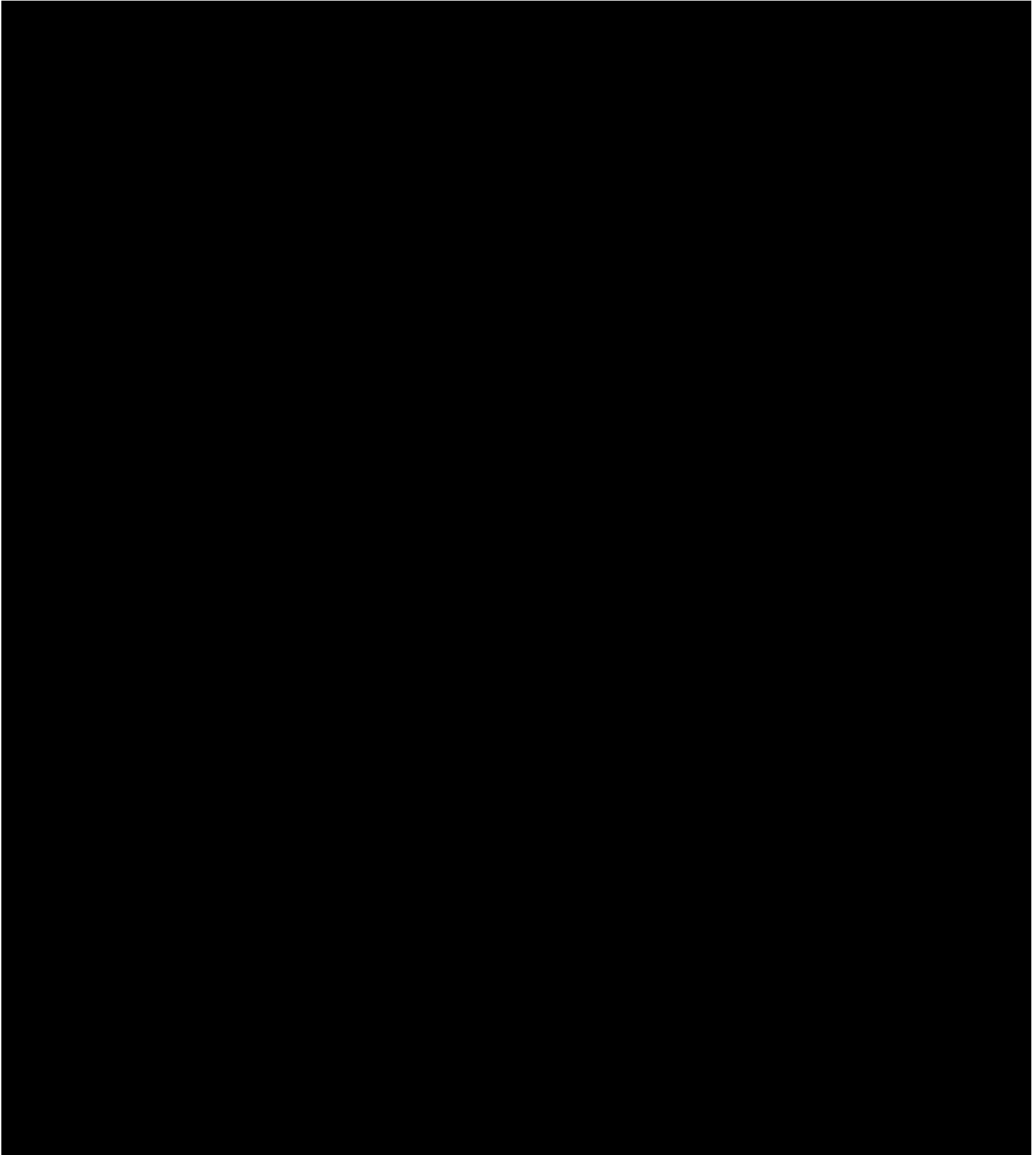
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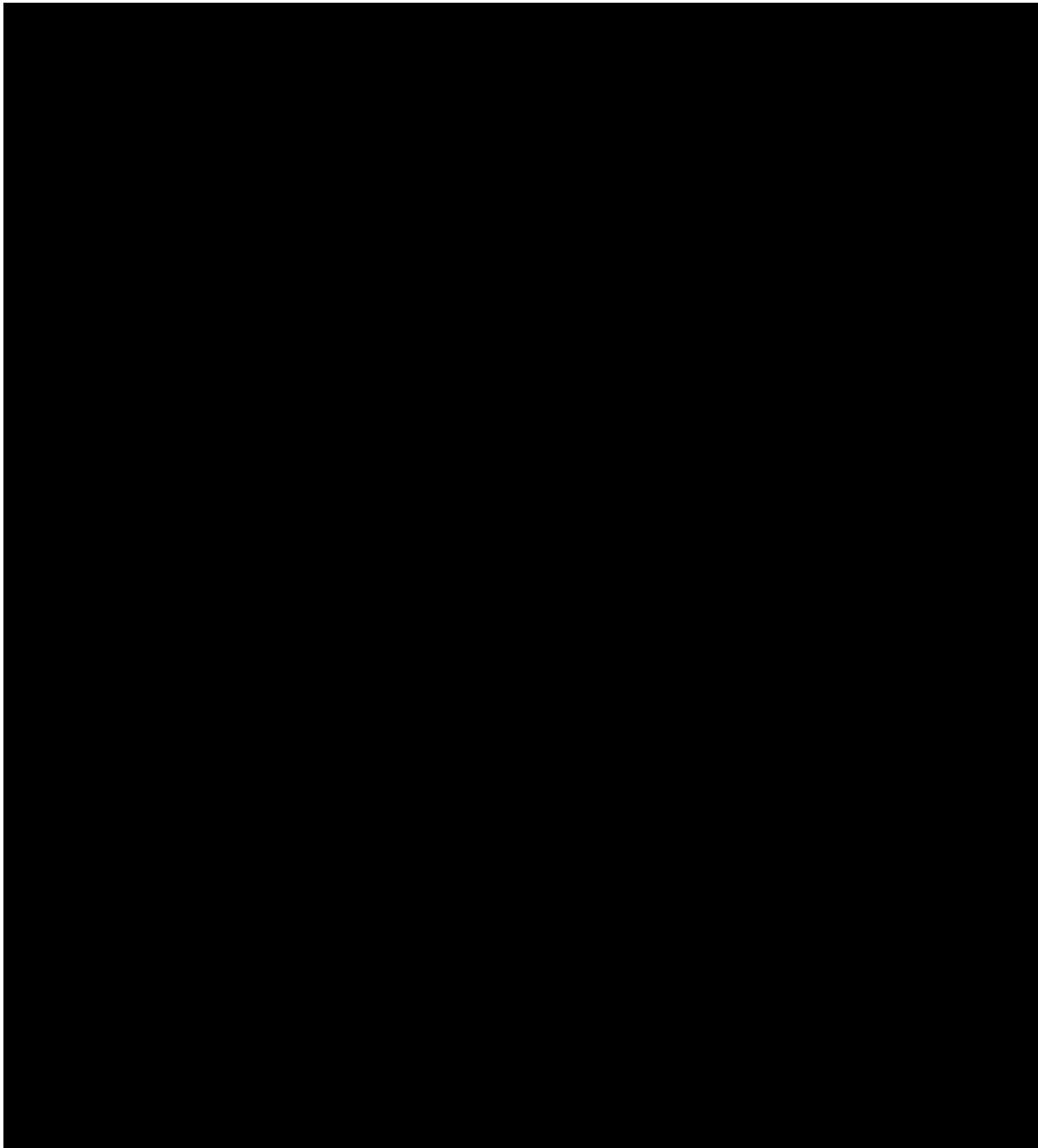
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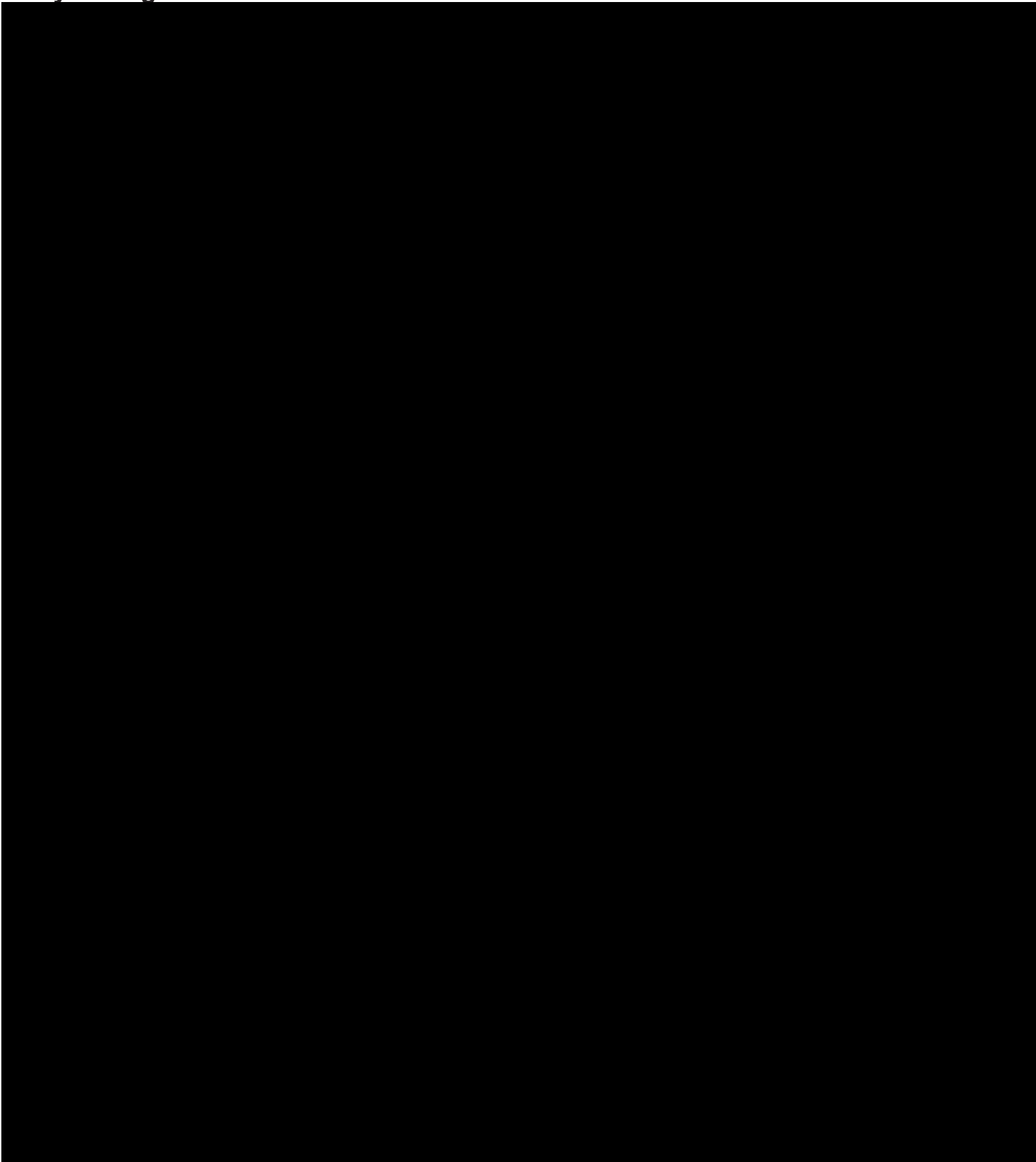


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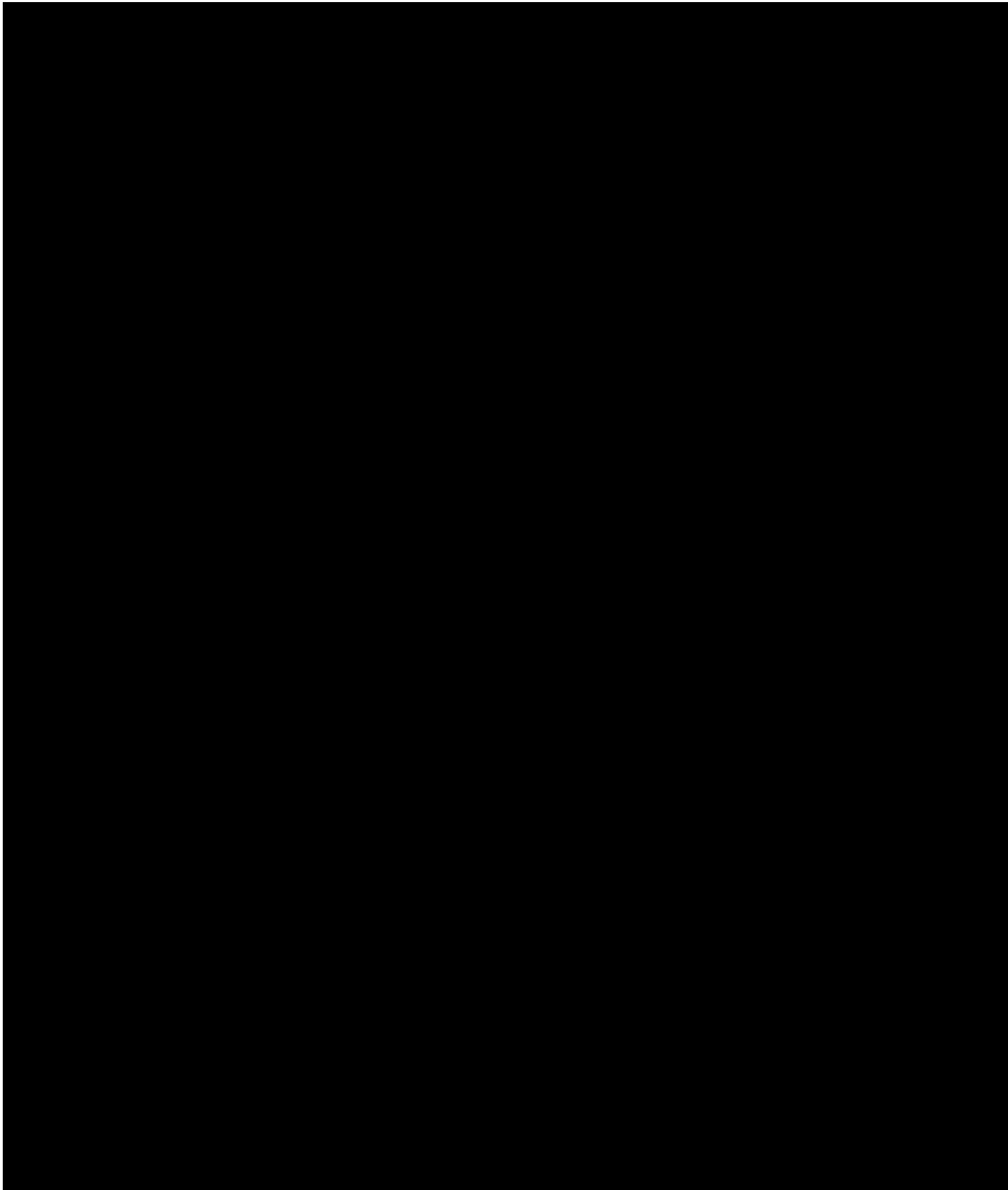


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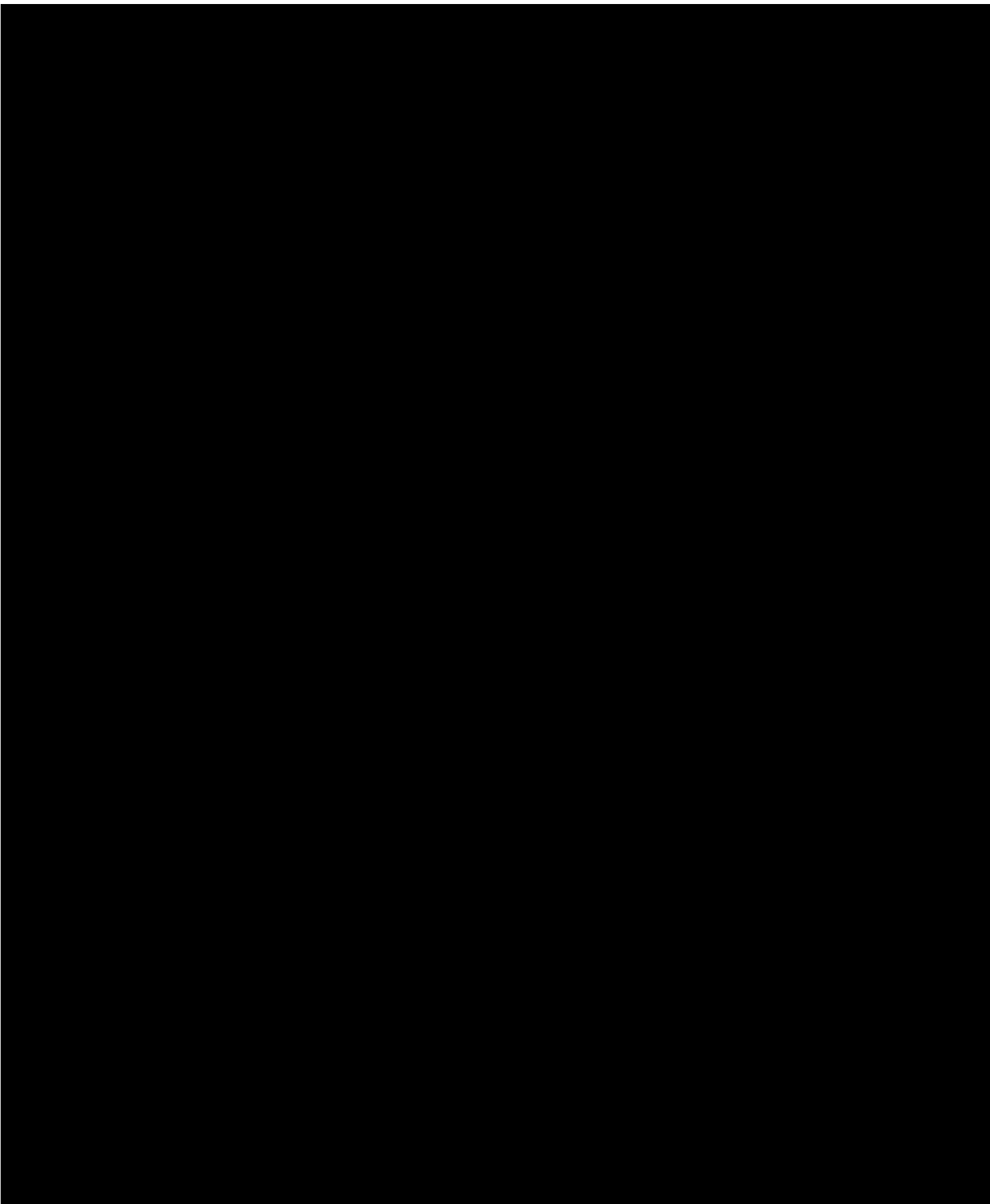
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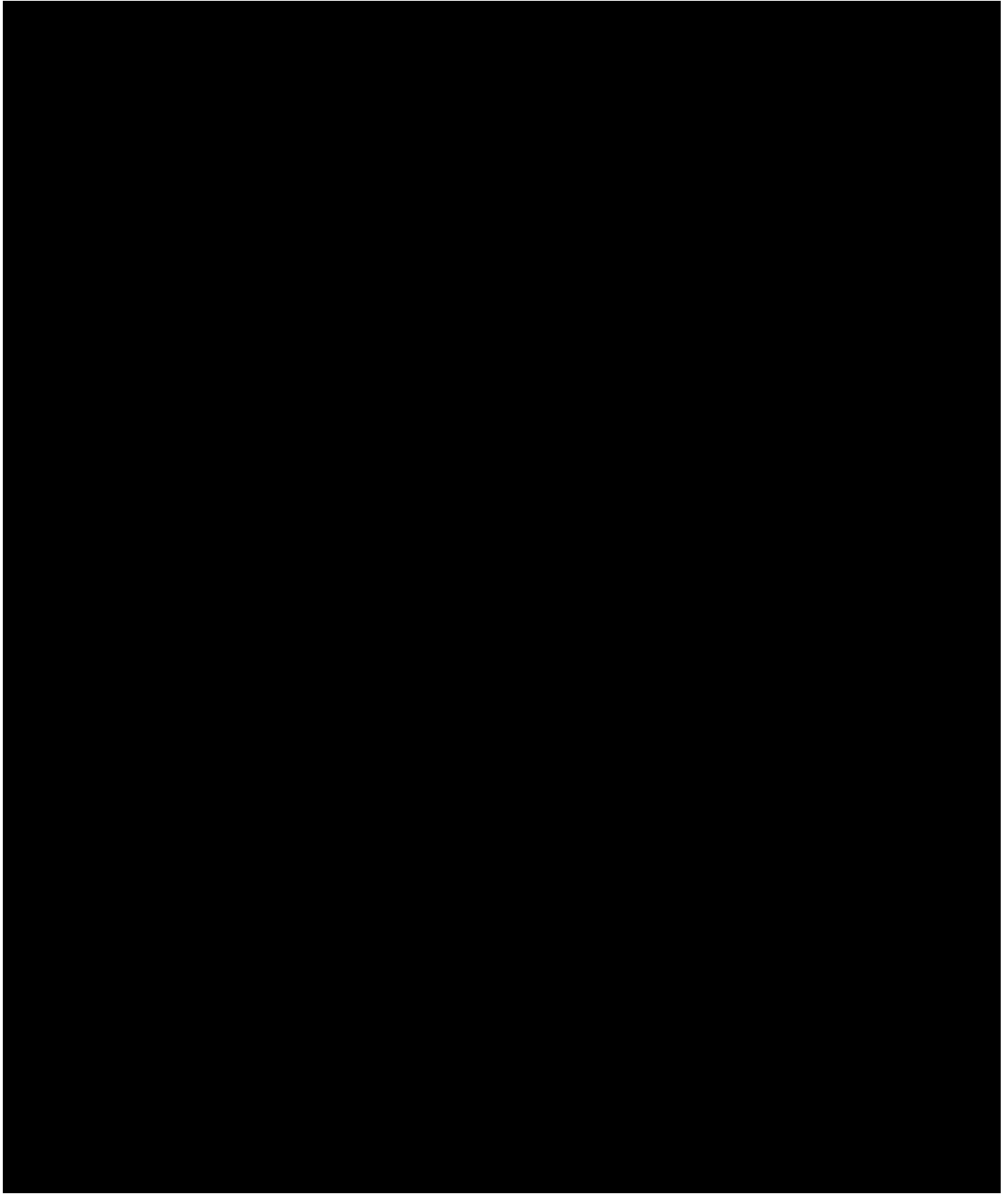
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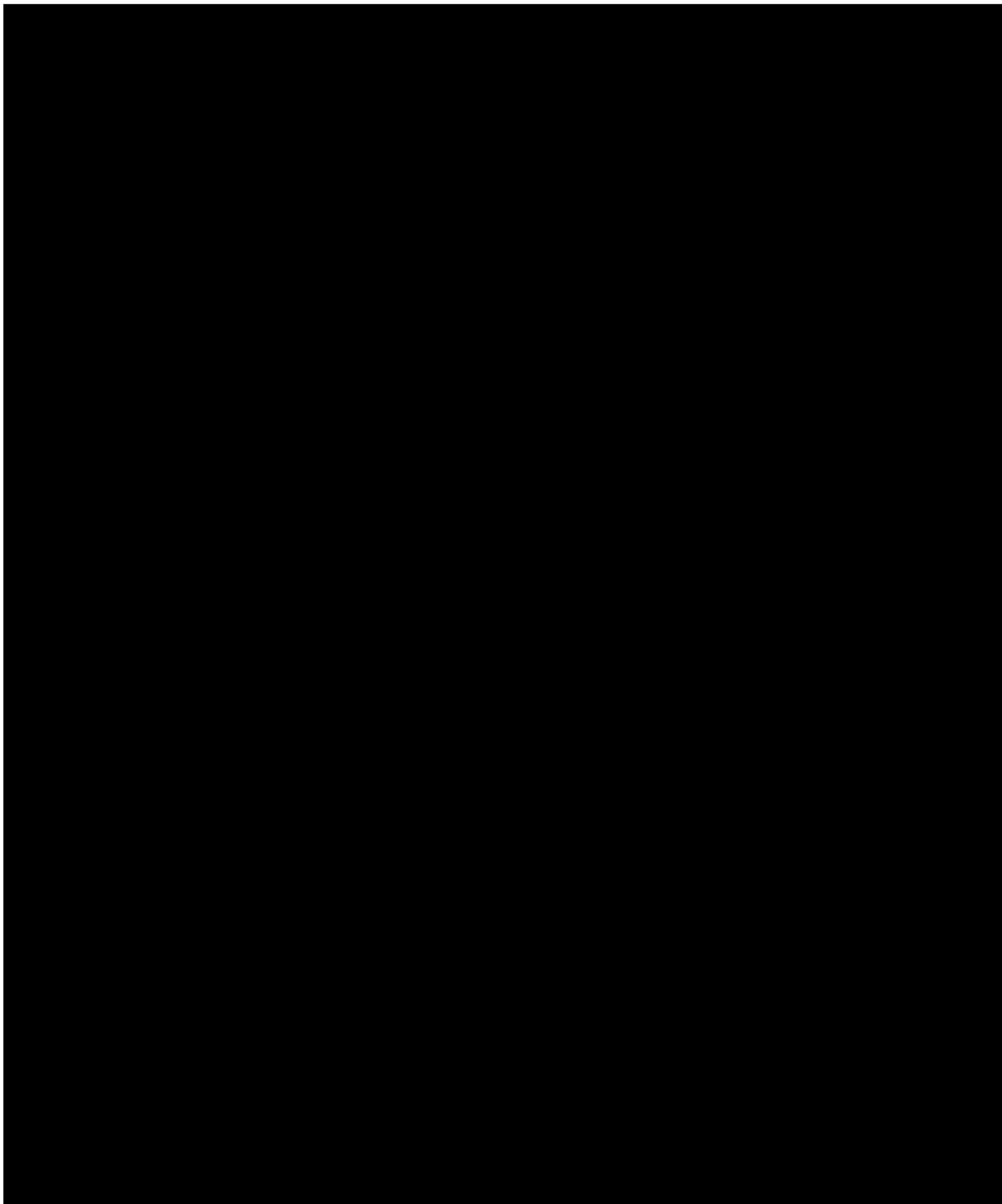
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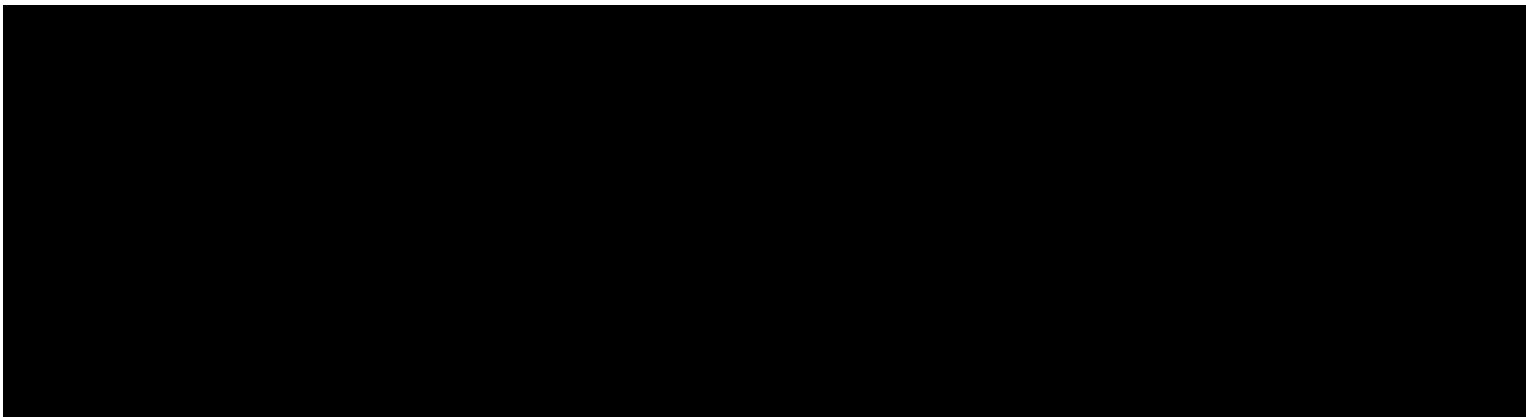
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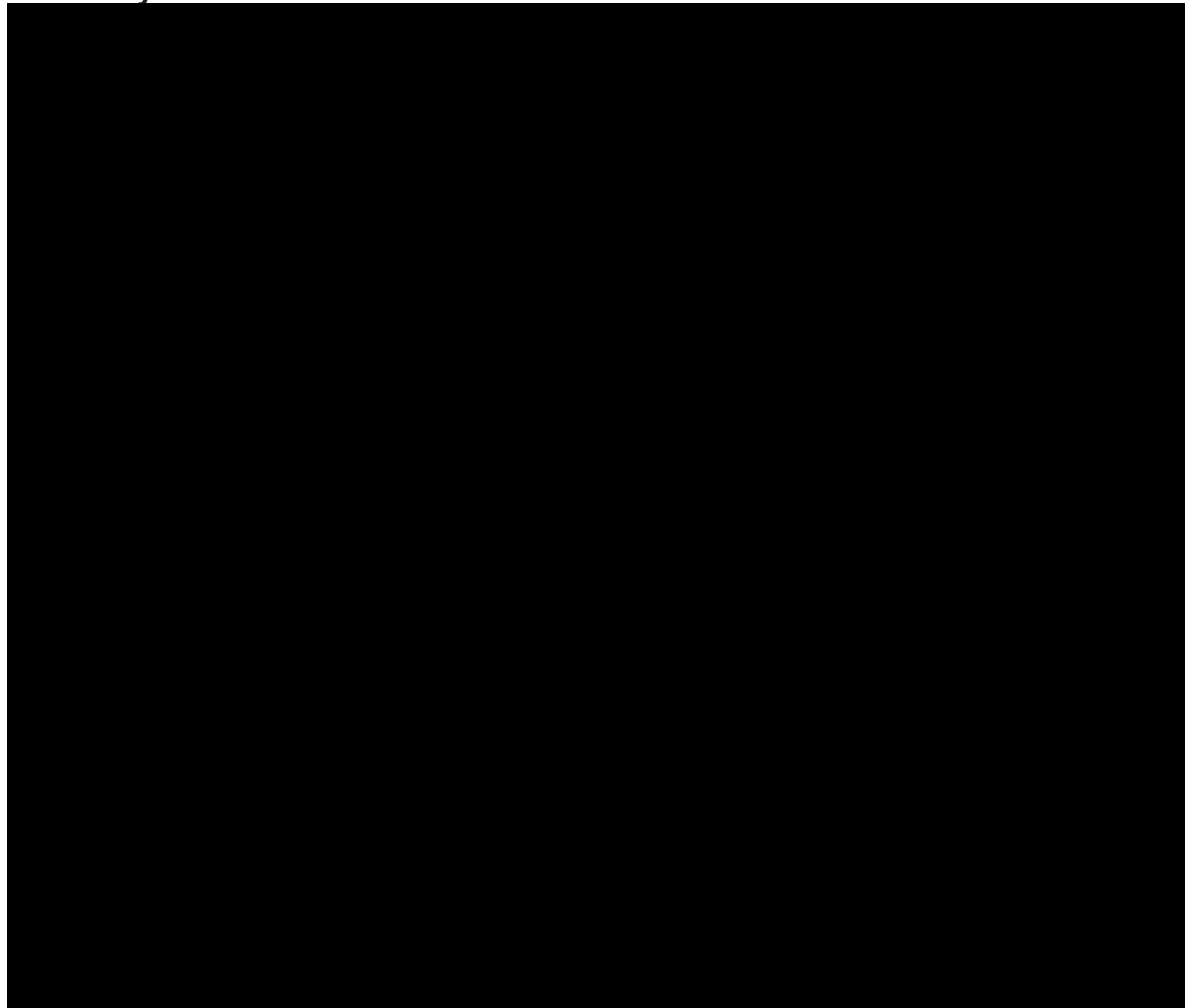
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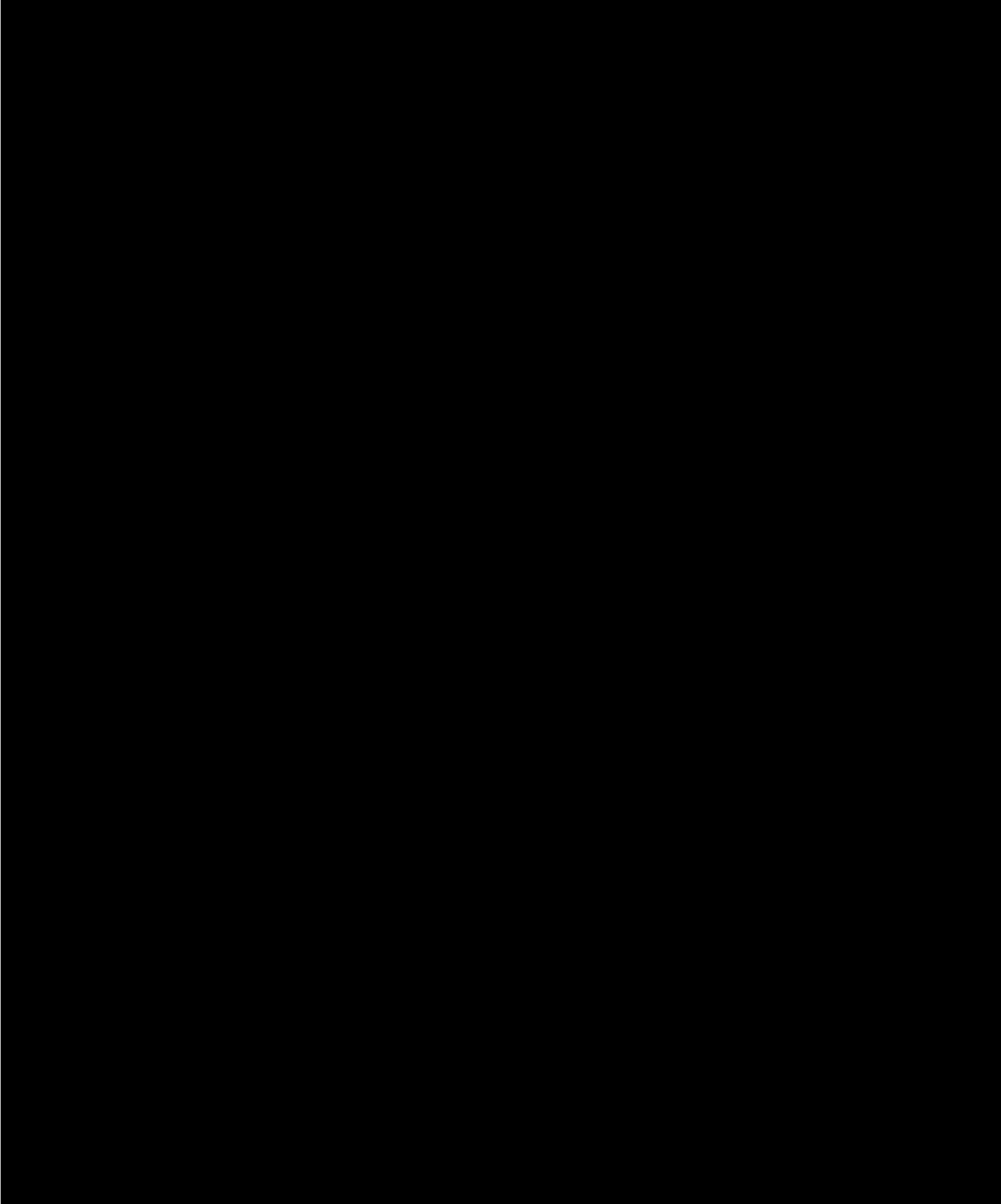
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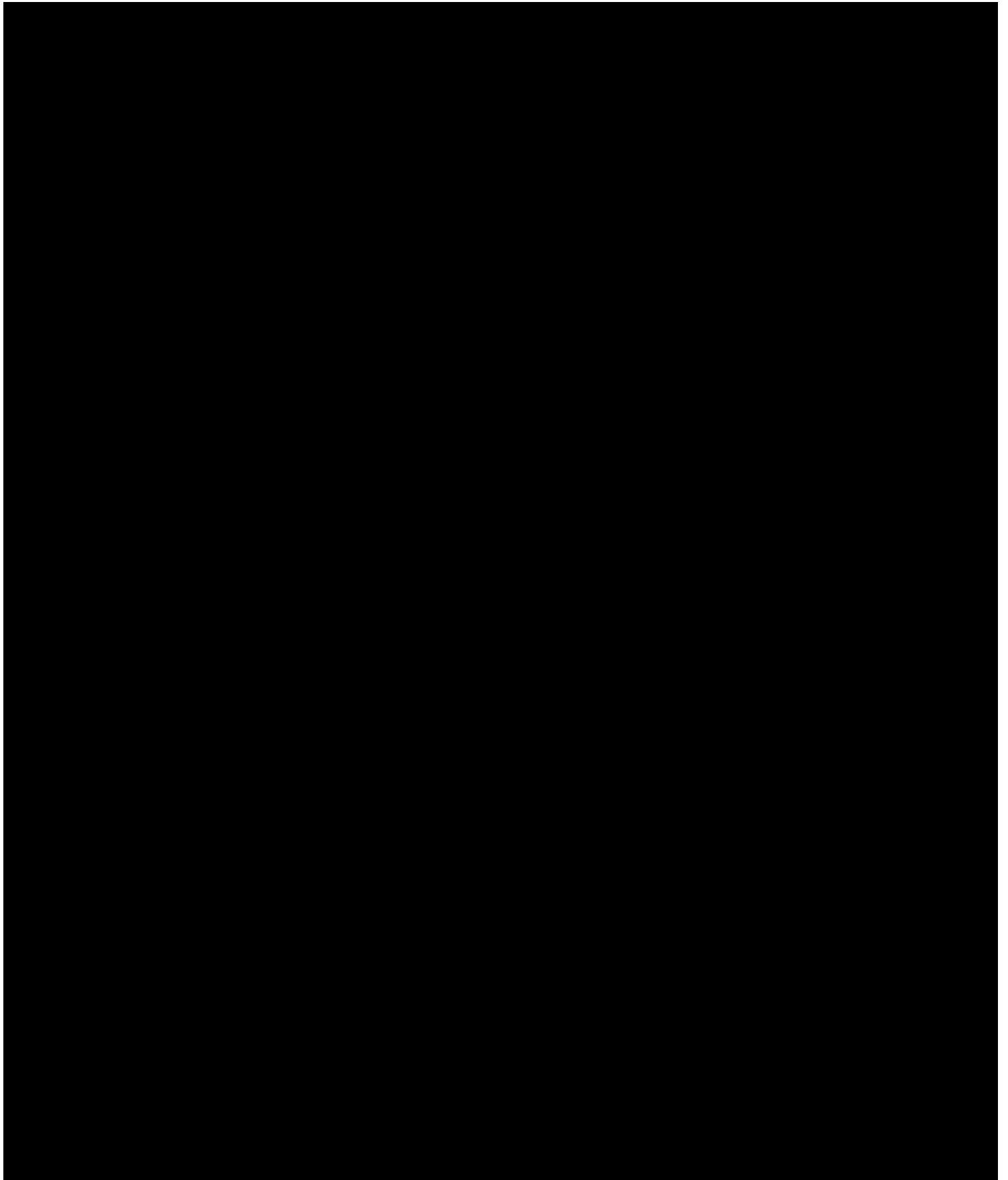
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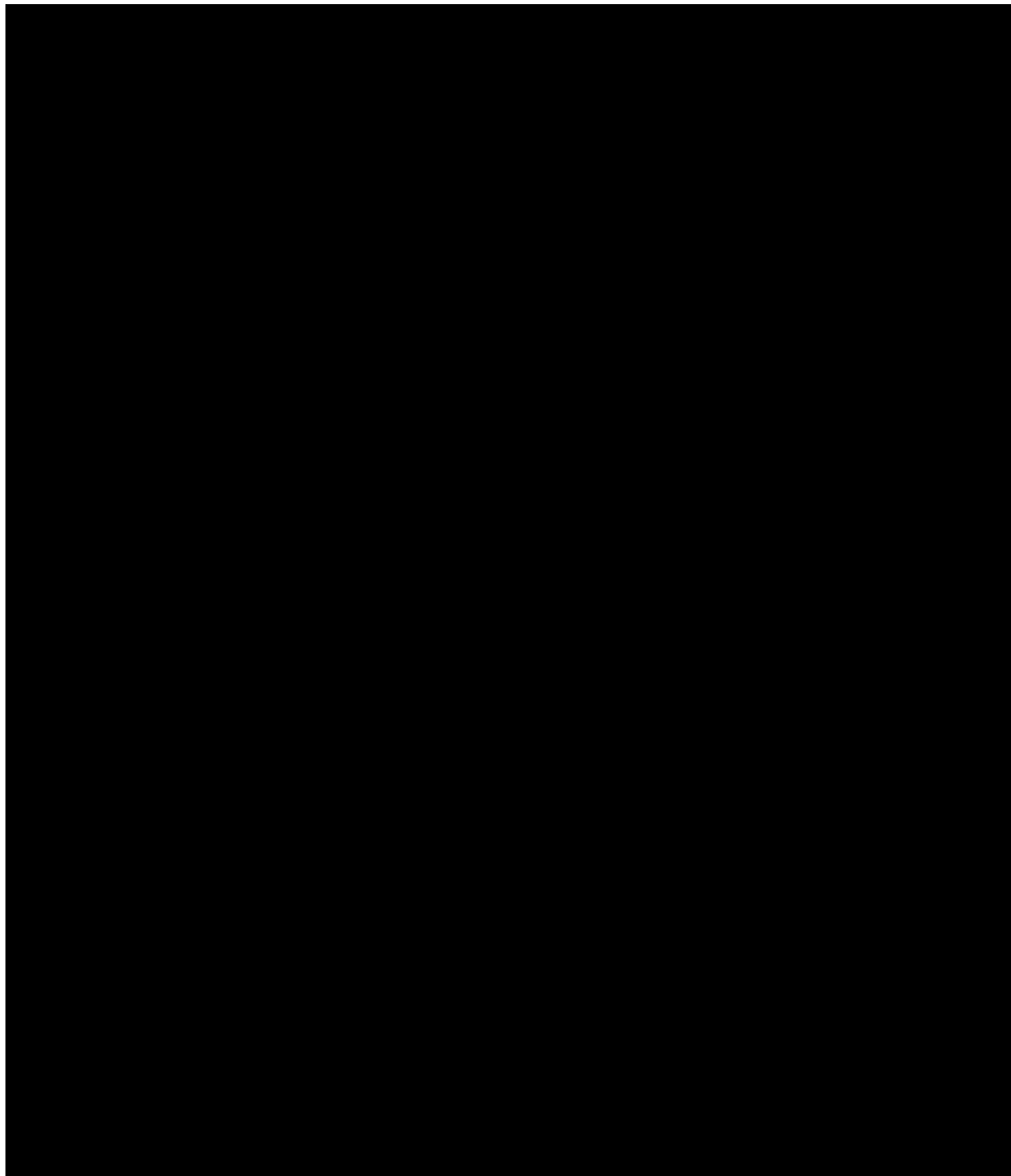
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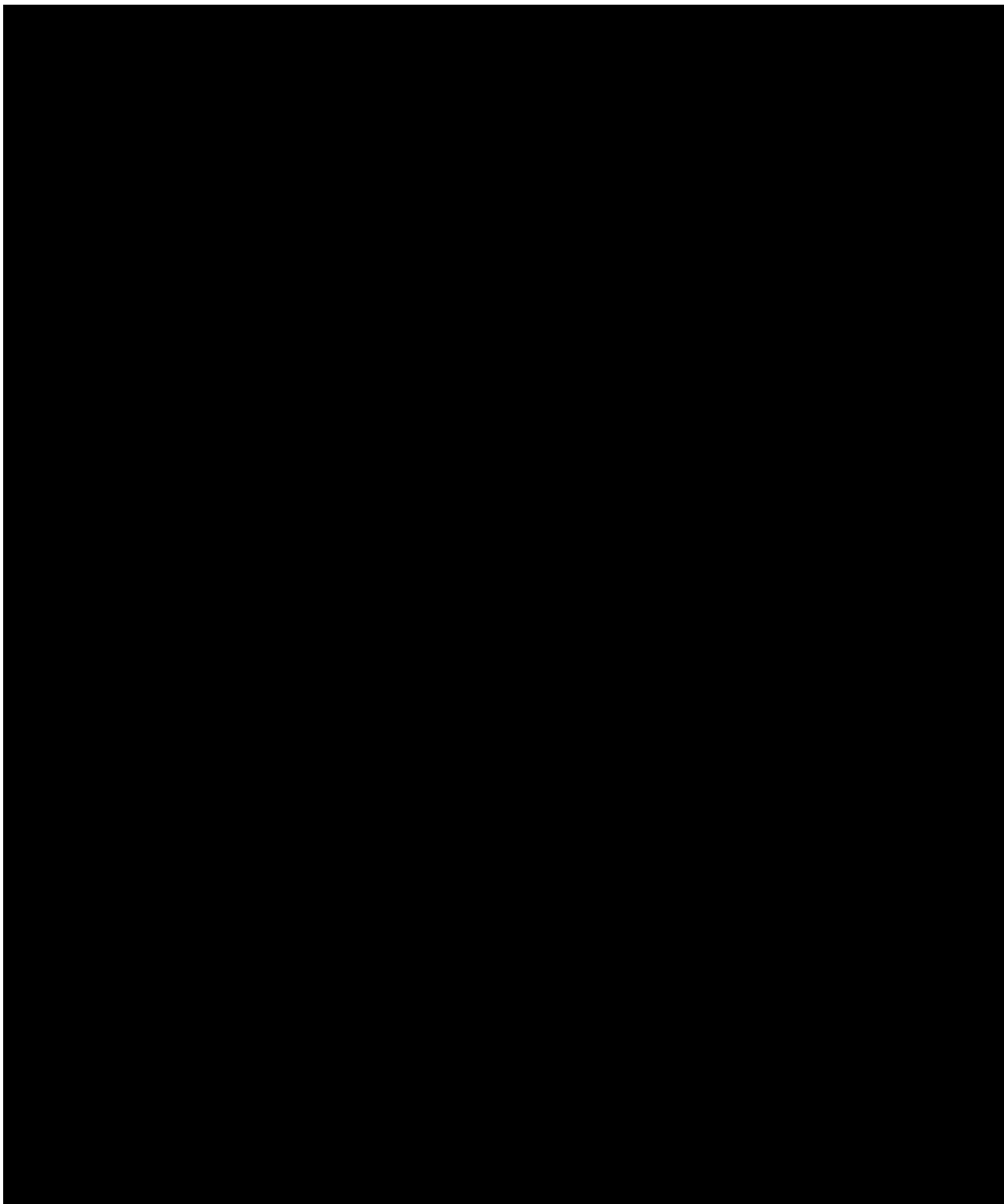
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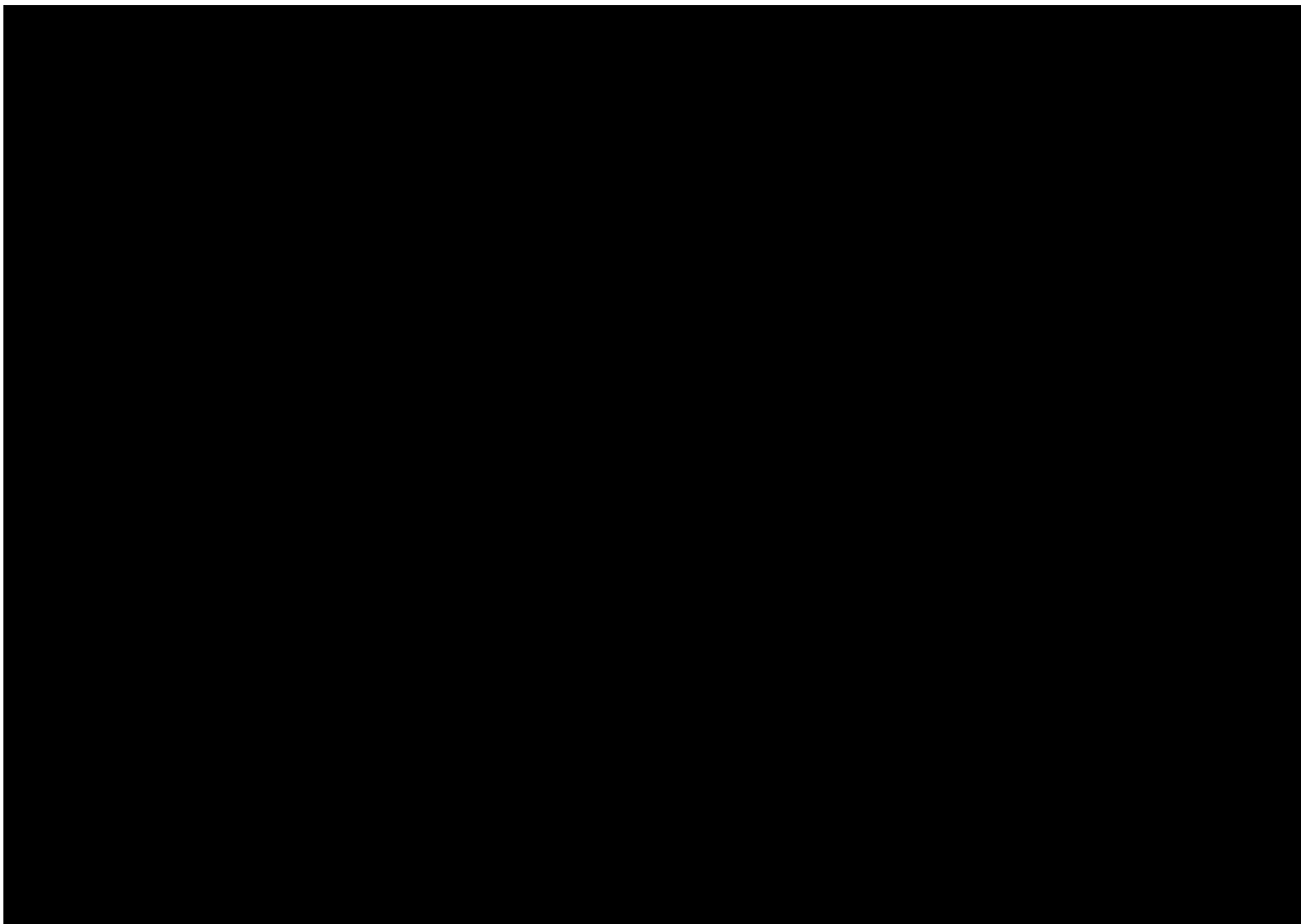
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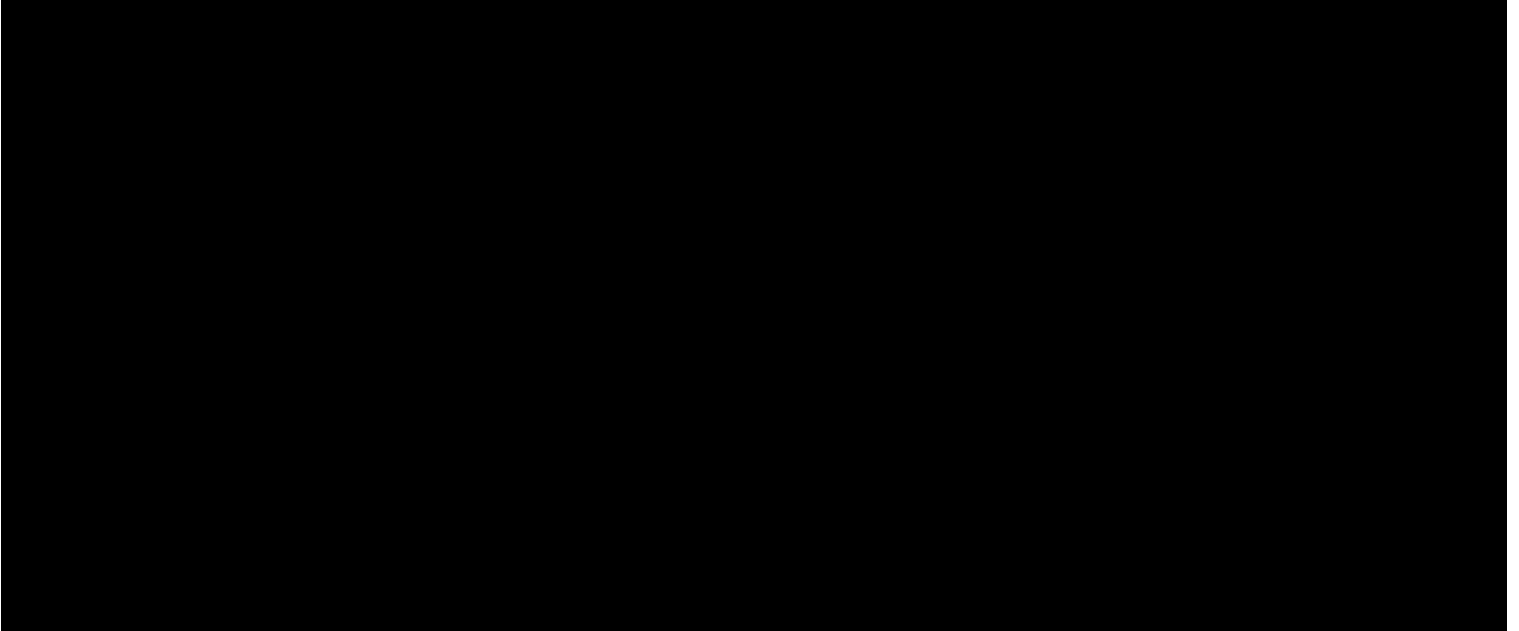
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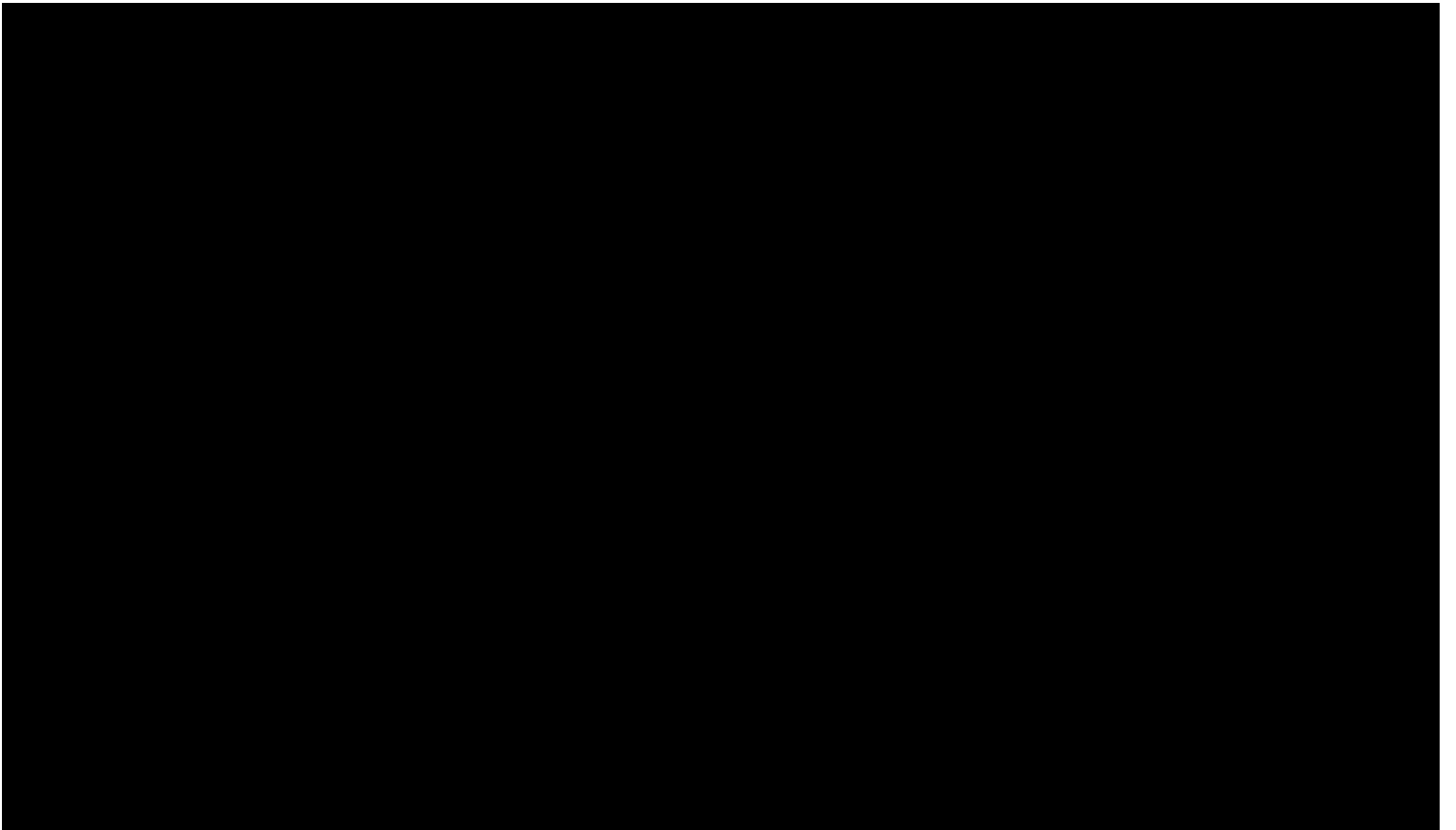
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Virginia Tech University

Proposed Leadership Coaches

Rachel Maglinger, Ph.D.



Brian J. Brim, Ed.D.



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Virginia Tech University

Gallup's Commitment to Diversity, Equity and Inclusion

Gallup was founded more than 80 years ago with an important mission: help people be heard. Since then, we have provided a voice to more than 95% of the world's adult population globally, through the Gallup World Poll and other important research partnerships with our clients. Diversity in our own workforce — in race/ethnicity, sexual orientation, gender identity, geography, religiosity, disability, political ideology, age and lived experience — has been crucial to amplifying the voices of millions of individuals in the U.S. and globally. It is the diversity in our employees' perspectives that guides us to asking the often-unasked questions and quantifying the will of the world on the most pressing issues, including equity, discrimination and harassment in the workplace, access to quality healthcare, access to clean water, food security, domestic violence, forced labor, trust in science and climate change, among others.

Gallup Workforce

Hiring

Gallup is committed to building a diverse, equitable and inclusive workplace in which employees can share their opinions and attitudes freely so their colleagues and clients can benefit from their unique perspectives. Gallup views diversity as the traits and characteristics that make people unique, equity as fairness in treatment, access and advancement for each person, and inclusion as an environment that makes people feel welcome, respected and valued.

At Gallup, we show our commitment to a diverse workplace throughout our hiring and development processes. Our scientifically validated and legally sound hiring assessments remove inherent biases and narrow in on a candidate's innate talent profile, helping us select the best candidate for the role, regardless of sexual orientation, gender identity, race, religion, disability or ethnicity. While we offer company-wide learning opportunities, most employee development and career growth opportunities are driven by employees' unique needs, talents and passions.

Training and Education

In 2020, Gallup created a Diversity Advisory Council — a team of Gallup associates who represent differences in race, ethnicity, age, gender, sexual orientation, tenure, role and location. The Diversity Advisory Council is dedicated to ensuring all Gallup associates and candidates have a realizable path to success and can express themselves authentically in every interaction. The council meets regularly to identify and recommend best practices Gallup can implement to improve diversity, equity and inclusion within its workforce.

Gallup also regularly provides internal education to its associates about DEI topics. These education opportunities help associates understand diversity within a specific area (i.e., race/ethnicity, gender, disability



Celebrating International Day of Persons with Disabilities

This past weekend, on December 3rd, was [International Day of Persons with Disabilities](#), where we celebrate and honor the contributions and importance of people with disabilities around the world.

More than one billion people — approximately 15 percent of the world's population — live with some form of disability. Disabilities can be invisible and range from sensory concerns to chronic illness.

With so many in the global community impacted, this day encourages awareness, understanding, and well-being of persons with disabilities and calls upon us to create a society free of discrimination.

If you're not sure what disability looks like, that's okay! Expanding our awareness of disabilities is a powerful first step in creating inclusive environments for everyone.

Gallup's Promise

Here at Gallup, we are committed to providing a workplace free of discrimination and harassment. This includes discrimination around mental or physical disabilities.



"We celebrate our associates based on their unique strengths, and we value and appreciate how different we are. For us to thrive, we need to be sure that we aren't just being inclusive — but that we are empowering each other to learn and share perspectives."

Matt Mosser, Chief Human Resources Officer

Gallup Response to RFP567142306
Virginia Tech University

or other difference), the value this type of diversity provides us as a society and workforce, and Gallup's relevant commitment.

Monitoring

Gallup also surveys its employees about their lived experience in areas related to diversity, equity and inclusion twice annually to ensure progress toward our own diversity, equity and inclusion objectives and goals. Gallup releases results from these surveys throughout the organization so that all Gallup employees can track progress over time as we seek to be an even more inclusive environment for all associates. Gallup leadership also reviews results by subgroup of the employee population to ensure we are offering a consistent employee experience.

Client Partnerships

Gallup partners with some of the world's largest corporations, foundations, agencies and schools to measure diversity, equity and inclusion within their workplaces. For more than 40 years, Gallup has measured the employee experience in the U.S. and globally through its employee engagement practice. Diversity, equity and inclusion are important and related to engagement — it is hard for employees to feel engaged if they do not feel included and welcomed within their own culture.

Gallup responded to the challenges its clients were facing on issues of diversity, equity and inclusion by developing a series of questions and indexes that systematically measure the extent to which employees feel treated with respect, valued for their unique skills and contributions and are treated fairly in their workplace. The most popular of these measures is Gallup's Culture of Inclusion index, which was developed through extensive research and testing, via a nationally representative survey of U.S. adults. In this national survey, participants were asked if they had experienced discrimination, nonsexual harassment or sexual harassment of any form at work during the previous 12 months. Participants were asked if they experienced any of 32 specific forms of discrimination, nonsexual harassment (11 forms, such as personal insults, jokes, threats, physical contact) or sexual harassment (seven forms, such as comments, jokes, touching, suggestions) in the past 12 months. Gallup conducted analysis to identify the top predictors of discrimination and harassment. Forty-two potential predictors (e.g., workplace experience, culture, engagement, personal characteristics, supervisor characteristics, job type, team composition) were studied in relation to each form of discrimination and harassment to identify the most important predictors. The result of this process was the three-question index, now used in thousands of organizations globally to measure inclusion within the workplace. Gallup brings this level of rigor to every new study of diversity, equity and inclusion that it conducts to ensure clients are continuously improving and creating cultures in which employees can thrive.

Gallup finds that 55% of U.S. employees strongly agree their organization has policies that promote diversity and inclusion, and 45% of U.S. workers report they have experienced some form of discrimination or harassment at work in the past 12 months.

Gallup Center for Black Voices

Since its founding, Gallup has tracked issues of diversity, equity, inclusion, discrimination and harassment — beginning in 1939 when Gallup asked its first documented question about systematic racism amid national news that a singer had been excluded from Daughters of the American Revolution due to her race. Since then, Gallup has tracked Americans' attitudes toward other national events, including the desegregation of schools and support for civil rights, voting rights and same sex marriage. In June 2020, Gallup extended its research by launching the [Gallup Center on Black Voices](#), which is devoted to studying and highlighting the experiences

Gallup Response to RFP567142306
Virginia Tech University

of more than 40 million Black Americans: tracking and reporting progress on life outcomes and a life well-lived. The center highlights experiences across **six pillars: justice, health and wellbeing, economic opportunity, jobs and work, education, community and environment**. Through the center and other related studies, Gallup has shared important insights about the percentage of Black Americans who report they have been discriminated against in the workplace; the extent to which Black and Hispanic workers feel valued, treated with respect and treated fairly within their workplace, and the percentage of women who have felt passed over for a job because of their gender. The Gallup Center for Black Voices is entirely Gallup funded and Gallup has committed to providing research through the center for the next 100 years.

Copyright Standards

This document contains trademarks, copyrighted materials and literary property of Gallup, Inc.

Gallup asserts all its international and domestic rights under applicable laws. The literary materials of Gallup shall only be used in consideration of this proposal.

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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: DocuSigned by:
Stephanie Marken
D17160DE63D7445.. Date: 4/25/2023

06/27/2022

[INCLUDE THIS PAGE]

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.

DocuSigned by:
Stephanie Marken 4/25/2023
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.

DocuSigned by: <i>Stephanie Marken</i> Signature	4/25/2023 Date
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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.

Gallup response – No, there is currently no information included that would be used to identify or harm a person's identity, finances or personal information.

2. Are there any additional forms or documents that you will require to be incorporated into the contract documents? If so, please submit.

Gallup response – None at this time based upon the services described in the proposal.

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?

Gallup 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?

Gallup 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?

Gallup 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.

Gallup response – Gallup can begin work as soon as 24 hours following contract finalization.

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?

Gallup response – Yes.

8. Do you agree that the initial contract period shall be two years?

Gallup 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?

Gallup 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?

Gallup response – Yes.

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

Gallup 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.

Gallup response – Gallup's head of Public Sector and Senior Partner, Joe Daly, is aware of this solicitation and directly supervises Gallup Partner Stephanie Marken, who is responsible for the overall Gallup-Virginia Tech relationship. Gallup's CEO Jon Clifton is also aware of this solicitation and directly supervises Joe Daly. Both Daly and Clifton are committed to staffing this project with the necessary team to ensure high-quality services are delivered, and VT expectations are met.

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?

Gallup response – Yes. When engaging with a client, Gallup meets weekly with our partner to ensure alignment throughout the project. These regular touch-bases ensure Gallup continues to meet and exceed VT expectations for the project, and remain on schedule/budget. Gallup also regularly surveys and requests feedback from its clients to ensure it continues to meet client needs. Gallup conducts a formal survey at least once annually, providing clients an opportunity to share anonymous feedback about the client experience.

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?

Gallup response – Yes. Gallup maintains a 1,200 person workforce, and can quickly staff individual projects and handle surges based upon client demand.

15. Please provide your best and final price structure?

Gallup response – Pricing provided in the proposal submitted April 25th continues to be Gallup’s best and final price offering for Virginia Tech.

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

Gallup response – Gallup can begin work within 24 hours of contract signature.

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

Gallup 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?

Gallup response – Yes.

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

Gallup 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?

Gallup 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?

Gallup response – No.

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?

Gallup response – Yes.

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

Gallup response – Yes.