

COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-2061-2024

This contract entered into this 19th day of July 2023 by The Change Decision, LLC 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 12, 2023, the proposal submitted by the Contractor dated April 26, 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

admissibility.
EC KN

(Initials)

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

DocuSigned by:
Contractor
By: Ed Cook

Ed Cook President

Name and Title

DocuSigned by:
Virginia Tech
By: Reed Nagel

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 SBSBD 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

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 – DEI scope of work is an additional service. The firm is not required to have DEI 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



EMPOWERING GLOBAL VISION

THE DYNAMIC DECISION TEAM | HIGHER EDUCATION CONSULTING SERVICES

Proposal Response Virginia Tech 2023 RFP: 5671412306

Proposal Response

Virginia Tech 2023 RFP: 5671412306

for

Organizational Consulting Services

Submitted by

The Dynamic Decision Team

210 Rocketts Way, Suite 612

Richmond, VA 23231

Company POC: Edward L. Cook, Ph.D.

ed.cook@thechangedecision.com

804-240-7728

www.thechangedecision.com

Response Due Date: April 26, 2023

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Proposal Submission Administration

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: Edward L Cook Date: 4/20/2023

06/27/2022

[INCLUDE THIS PAGE]

3

Statement of Need/Scope of Work

The Dynamic Decision Team consists of The Change Decision LLC and Agile Immersive LLC. As described below, the two companies are each SWaM businesses that bring complementary best-in-class capabilities which together cover the scope of activities desired to continue advancing the bold vision of Virginia Tech's Beyond Boundaries strategy. Higher Education Consulting Services is our passion because the founders and principal consultants of our firms are a former Provost as well as professors and lecturers to leading academic institutions around the globe. University of Richmond, George Washington University, and Goethe Graduate School of Pharmaceutical Business in Frankfurt, Germany are among the institutions the Dynamic Decision Team continually influence. The principals of both The Change Decision and Agile Immersive have a working relationship that goes back to before the founding of each company. The working relationship and networks of higher education consultants, that the Dynamic Decision Team will bring to empower Virginia Tech's Beyond Boundaries vision will inspire next generation thinking and eliminate barriers. The Dynamic Decision Team will be Virginia Tech's go to higher education consultants that empower Virginia Tech to become one of the Top 100 Global Research universities in the world.

The Change Decision, LLC is a Small Woman-Owned (SWaM), Change, and Culture consultancy focused on growing Joy at Work. The Change Decision does this through consulting and training across Change Management, Decision Analytics, and Team Effectiveness.

The concept of Joy at Work is central to the approach that The Change Decision takes because it takes the work beyond the immediate impact desired and includes the longer-term impact on the culture. Joy at Work is not just an expression of a desire for a happier workplace but also a deeply researched topic by the two principals of The Change Decision, Roxanne Brown and Ed Cook, Ph.D. This is not only for the continuous improvement of their consulting insights but also for the advancement of academic knowledge. Ed Cook, Ph.D. is on the faculty of the University of Richmond and studies how organizations make group decisions and the impact the decision-making process has on Joy at Work.

A core outcome of the research on Joy at Work is a model that integrates the work of Amy Edmundson on Psychological Safety and the work of Pierre Bourdieu on Emotional Capital, a component of his Social Capital model. The result is a practical process for applying the theory described by Edmundson and Bourdieu so that it can be implemented in an organizational setting. Moreover, the Joy at Work research outlines a measurement approach so that the impact of psychological safety and emotional capital can be described through their impact on Joy at Work. In this way, the work that the Dynamic Decision Team does for Virginia Tech can be monitored to ensure it has both a positive impact on the tactical work and a positive impact on the cultural goals of the Beyond Boarders strategy.

Agile Immersive, LLC is a Small Minority-Owned Transformation Strategy consultancy that leverages its proprietary tool, "Friction Less Enterprise™" to transform institutions of Higher

Education, Government agencies and the Fortune 500 into responsive and agile, top performers. Agile Immersive pairs an emotionally intelligent methodology with outstanding outcomes that enables our clients to leapfrog their competitive landscape and become best-in-breed. Agile Immersive was founded by National Reconnaissance Office Fellow, former U.S. Air Force Captain Thomas Lee Johnson. The Central Intelligence Agency sponsored Captain Johnson's thesis to transform its thinking about reducing the cost and inefficiency of spacelift for imaging satellites. Captain Johnson's 1998 scholarship predicted the cost saving outcomes of the X-prize's impact on spacelift two decades before those results became evident to the world. Captain Johnson is joined by a former member of the White House Counsel's office and George Mason Legal Fellow Alastair Walling. Alastair brought best practices and new energy to organizational change initiatives at Clark University and Wichita State University, where he pioneered interdisciplinary scholarship and removed barriers for remote students. Agile Immersive's Fulbright Fellow and Rhode Island School of Design lecturer Roe Messinger models a culture of excellence and accelerates extramural opportunities for faculty and students in television and film projects, which have been jury selected for the New York Film Festival.

The Dynamic Decision Team will exceed Virginia Tech's Beyond Boundaries expectations with our pioneering tools and high touch style. Virginia Tech wants to be a world-renowned destination for recruiting and talent retention and the Dynamic Decision Team will enable the organizational change initiatives and new thinking that will make that happen. Virginia Tech faculty and staff deserve to experience Joy at Work on their transformational journey to remain a Top 100 Global Research universities. Friction Less Enterprise will equip all levels of university leadership, management, and staff with video-on-demand or in person immersive tools to unlock their full potential and align with Virginia Tech's overarching strategy. The Dynamic Decision Team specializes in immersive, multichannel media so that Strategy Consulting projects can translate across all Virginia Tech campuses from Blacksburg to Alexandria to Punta Cana, DR and Riva San Vitale, Switzerland. In the experience of The Dynamic Decision Team, it is a thriving and ever-evolving culture that is the key enabler of such a transformation. That is why The Dynamic Decision Team proposes to guide its work with Virginia Tech to grow Joy at Work.

Vendor Profile Information (Sec VII, A, 1)

RFP Description

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.

Response from The Dynamic Decision Team

Legal Business Name

The Change Decision

Agile Immersive

Legal Status

Limited Liability Corporation

Start Date

The Change Decision: February 1st, 2016

Agile Immersive: August 30, 2015

Home Address

The Change Decision

210 Rocketts Way Suite 612

Richmond, VA 23231

Agile Immersive

16192 Coastal Highway

Lewes, Delaware 19958

Phone Number

The Change Decision: 804-506-0403

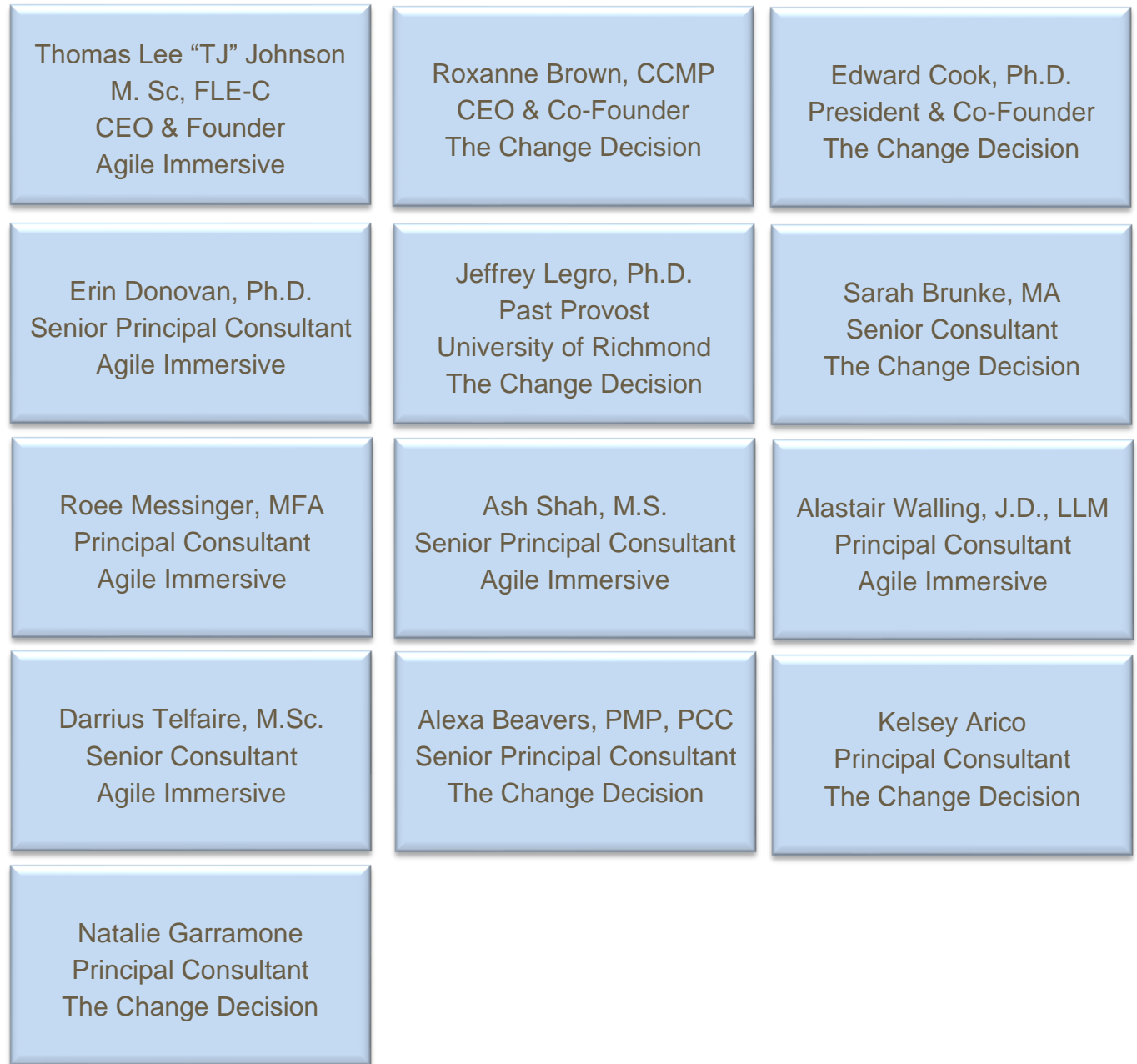
Agile Immersive: 571-403-1506

Web Site

TheChangeDecision.com

AgileImmersive.com

Dynamic Decision Team Organizational Chart



Vendor Organizational Capabilities (Sec VII, A, 2)

RFP Description

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.

Response from The Dynamic Decision Team

Brief Description of the Dynamic Decision Team

The Dynamic Decision Team is a team arrangement between The Change Decision, LLC, based in Richmond VA, and Agile Immersive, LLC, based in Lewes, Delaware, and includes a team of consultants with considerable experience with direct applicability to Virginia Tech's Beyond Boundaries strategy. Notable among these is Jeff Legro, Ph.D., the (soon-to-be) former Provost of the University of Richmond.

The Dynamic Decision Team will present as a single company with Ed Cook, Ph.D. acting as the point of contact for the contract so that interactions are smooth for Virginia Tech; however, the structure of the partnership will be transparent to Virginia Tech so that interactions are clear.

Roxanne Brown, CCMP

Roxanne is a career Change Practitioner with over 25 years of change experience from the Fortune 200 to small businesses Her work has spanned large-scale change initiatives, culture strategy, communications, and training with extensive time in coaching executives through organizational transformation.

Roxanne is the former Chair of the Board for the Association of Change Management Professionals (ACMP). She led that organization through the existential crisis of the global COVID-19 pandemic. Her tenure on the board also included the launching of the Certified Change Management Practitioner credential and the Standard for Change Management which includes her welcome letter.

Roxanne has established a Change Leadership Community of Practices, helped implement the first change management practices, and set the program change management methodology and toolset for organizations from the Fortune 200 to small businesses. She teaches change management courses, leads discussion groups on the subject, and mentors practitioners.

Her specialty is in creating high-performing teams by engaging the unique abilities of leaders and team members. As a result, Roxanne moves the organization beyond just implementation and into culture strengthening.

Roxanne is the co-founder of the Change Decision, LLC, a SWaM certified, change and culture consultancy focused on growing Joy at Work. She brings her unique combination of leadership insight and coaching abilities to guide leaders through not only completing the change by improving their organization's culture.

Thomas Lee “TJ” Johnson, M.Sc., FLE-C

Thomas Lee “TJ” Johnson is the CEO & Founder of the SWaM-certification pending, Transformation Strategy Firm, Agile Immersive. Agile Immersive was founded in 2015 after TJ spent 20 years in professional leadership roles. Before TJ founded Agile Immersive, he built spy satellites at the National Reconnaissance Office and earned the Joint Meritorious Unit Award, Air Force Organizational Excellence Medal, Air Force Achievement Medal, and the National Defense Service Medal. TJ invented and pursued patenting for his novel transformation strategy framework called, “Friction Less Enterprise™.” Friction Less Enterprise (FLE) has driven profound outcomes in multiple industries all over the globe and led TJ to be an invited keynote speaker in various locations and repeat guest lecturer at the Goethe Graduate School of Pharmaceutical Business in Frankfurt, Germany. TJ is a former co-chair of the Pharma 4.0 Working Group for the International Society of Pharmaceutical Engineering and co-authored scholarship on breaking barriers for transformational thinking and sustained transformation adoption in the health sciences.

TJ founded Agile Immersive because he wanted to bring his passion for responsive industry and transformation from stale thinking to visionary ideas to clients around the world. TJ has had the privilege of coaching Financial Services Sector and Healthcare and Pharmaceutical Industry CEOs, President's, Executive Vice Presidents, and executive teams for a decade. His impact on those leaders and their businesses has been far-reaching. In 2016, he helped The University of Texas at Arlington Research Institute (UTARI) reimagine its ground-breaking Traumatic Brain Injury go to market strategy, in 2019, he helped MetLife resolve a \$500M pensions payment challenge, in 2020 he helped medical technology firm eSolutions re-orchestrate its infrastructure for 41% gains in efficiency during the height of the COVID-19 pandemic.

TJ is a polymath who has won national recognition for his contribution to Arts & Humanities. In 2019 he won the National Black Theater Festivals Frank Silvestra Writing Workshop for his screenplay “Albert & Paul” and has used his art in collaboration with Agile Immersive's Diversity Equality Inclusion and Belonging Practice to lead Princeton, New Jersey in a highly attended community inclusion event entitled, “Shattering the Illusion of Otherness,” to enthusiastic reviews. TJ's speeches, podcasts and artistry can be seen on HBO, Discovery Channel, Spotify and Apple.

Ed Cook, Ph.D.

Ed has over 20 years of leadership and analytical experience at Fortune 200 companies and is a retired Naval Officer and Naval Aviator. As a pilot in the C-2A Greyhound, Ed had over 700 aircraft carrier landings and help develop the special operations paratroop capabilities of the C-2A.

As a business executive, Ed has led multimillion-dollar product lines and implemented large process and infrastructure changes. The culminating effort was in leading the program where Capital One built coffee houses (Capital One Cafés) across the country instead of traditional branches.

In 2007, Ed was mobilized by the US Navy and sent to Baghdad, Iraq where, as CDR Ed Cook, he worked in the Green Zone on the Commanding General's Staff, at the time Gen. David Petraeus. Ed worked extensively on employment initiatives for the people of Iraq bridging across the US military, the US Embassy, and the Government of Iraq. For his efforts, Ed was awarded the Bronze Star.

Ed is the co-founder of The Change Decision, LLC, a change and culture consultancy focused on growing Joy at Work. Ed has a BS in Aerospace Engineering, an MBA, and holds a Ph.D. in Systems Modeling and Analysis. He brings his expertise in Decision Analytics to the work of The Change Decision. Ed also employs his analytics expertise as a Visiting Professor at the University of Richmond in both the undergraduate and MBA programs.

Jeff Legro, Ph.D.

Jeff Legro is the (soon-to-retire) Executive Vice President and Provost at the University of Richmond. He is also a Professor of Political Science. Jeff led the University of Richmond through the global pandemic.

As the chief academic officer, he is responsible for the academic mission of the University including the curriculum, research programs, academic budgets, and faculty development. He oversees the five schools, the divisions of student development, enrollment management, planning and policy, and departments of community initiatives, faculty development, international education, research, student academic initiatives, and the library.

Previously, Jeff was the Vice Provost for Global Affairs and Taylor Professor of Politics at the University of Virginia. As Vice Provost, he led the creation of the Global Studies major, a global internship program, a new research center, UVA Global LLC, and a university office in China. He has chaired the American Political Science Association Task Force on U.S. Standing in the World and is the past president of the APSA's International History and Politics section. He has also served as a consultant to governments and foundations.

An expert on international affairs, Jeff is the author of numerous books and articles, including *Rethinking the World: Great Power Strategies and International Order*. He co-edited *Shaper Nations*:

Strategies for a Changing World and *Uncertain Times: American Foreign Policy after the Berlin Wall and 9/11*. He has researched and taught in China, Great Britain, Germany, Russia, and India.

[Erin Donovan, Ph.D.](#)

Erin is tenure track professor at Carolina Coastal University and an experienced senior level executive with over fifteen years of organizational transformation success. Erin has led organizational change initiatives at Carolina Coastal, MassMutual, Cisco, and Archwell Mortgage. She develops and facilitates sustainable learning development strategies, including technical training, professional development, continuing education, and master instructor training. Erin consistently achieves performance excellence by leveraging vision, mission, resources, and results-focused priorities, objectives, and timetables. She delivers successful outcomes within the most high-visibility and challenging environments. She also serves as a trusted advisor and confidante to the executive team, management, and staff. Collaborates with key stakeholders to identify hidden improvements within learning and training programs and to develop innovative solutions. And, fuses technology and learning to transform underperforming individuals and groups into dedicated teams driven to achieve unprecedented results.

[Alastair Walling, J.D., LL.M.](#)

Alastair is an Adjunct Professor at Wichita State University and Clark University with fifteen years' experience in development of Strategy Consulting and Organizational Change Initiatives, Internal Management and Business Consulting, Education, Law and Economics. Alastair uses his legal acumen to shape and reshape regulatory frameworks to spark new thinking in business process evaluation and design. He is a former member of the White House Counsel Office Nomination team that recommended judges to the Federal Bench and the U.S. Supreme Court. He is a legal scholar who has been responsible for reading the opinions of judges being considered for appointment by the President of the United States and making recommendations so that informed conclusions are reached. Alastair has published in national, university, state and commercial journals and lectured extensively.

[Roe Messinger, MFA](#)

Roe is a Fulbright Fellow and lecturer at Rhode Island School of Design with twelve years of experience working as a narrative and documentary filmmaker. Roe embodies Agile Immersive's organizational transformation technique of knowing your story to be able to reinforce the agile values of your story and unlearn the misaligned ones. Roe brings transformative thinking into storytelling tools so that his faculty, staff and students can streamline workflows, minimize redundant efforts and leverage automation tools to accelerate higher learning. Roe's passion and energy is infective! He models Friction Less Enterprise for Rhode Island School of Design by bringing excellence in transformative storytelling to stories featured in the New York Film Festival, Gotham Film & Media Institute, Hollywood Reporter, Washington Post, MSNBC, Filmmaker Magazine, and PBS. Roe models transformative storytelling in Agile Immersive's Diversity Equity Inclusion and Belonging Practice by giving

communities, faculty, and students the storytelling techniques and tools to unlock their story and reveal their own hidden truths. Roee's skillsets include all creative components of filmmaking including film directing, cinematography and film editing as well as practical business end competencies ranging from development and planning, production management, postproduction coordination and video editing and securing distribution for the projects.

[Ash Shah, M.Sc.](#)

Ash is a Transformation Strategist with 24 years of hands-on experience leveraging a wide variety of transformation methodologies in multiple domains and enterprises to build high performing teams and helping the federal government adopt iterative development and incremental value-delivery. He enjoys shifting mindsets in highly matrixed public sector organizations to focus on delivering value early and often within changing, ambiguous, and complex business environments. Ash has led organizational change transformation for the Veterans Health Administration (VHA) Scheduling and Telehealth Product line successfully with accolades from VHA client. Conducted 10+ Program Increment (PI) Planning events supporting 4 programs - VAOS (VA Online Scheduling), VSE (Vista Scheduling Enhancement), TMP (Telehealth Management Program) and VA Scheduling (VAS) UI Agile Teams. Ash has coached VA's program management office and facilitated annual Strategic Planning events, coaching teams on agile methodology, capacity allocations, risks, and dependencies.

[Darrius Telfaire, M.Sc.](#)

Darrius brings 16 years of organizational change program management with a deep, concentrated understanding of the corporate learning & educational development space. Darrius has inspired and led organizational change initiatives at the staff level with a hands-on approach and remarkable outcomes. He has provided transformative sales and technical training for global corporations: Amazon Web Services, Lenovo, Hewlett-Packard, and Dell, within tight budgetary constraints. Darrius has led multiple, simultaneous transformation projects in sales training at Amazon Web Services to a 22% growth in learning retention. He has an exceptional ability to observe every business situation from different perspectives and apply necessary actions to provide superb results.

[Sarah Brunke, MA](#)

Sarah holds a Master of Arts, in Educational Leadership and Administration and is an Adjunct Professor at Virginia Commonwealth University's School of Business.

Sarah has significant experience in analytics with financial services and FinTech companies primarily with respect to marketing, business development, and customer acquisition. Sarah has led efforts to broaden the customer base through adjacent product development which led to the expansion of the customer base and the deepening of customer relationships.

She has worked within a university structure as a marketing strategist for the University of Central Florida where she focused on event marketing to build student loyalty and provide expanded learning experiences.

[Alexa Beavers, MS, PMP, PCC](#)

Founder and managing partner of The Axela Group, Alexa has a track record of successfully coaching leaders, cultivating change-making teams and shaping organizational transformations that deliver results. Her career spans public and private sectors, and includes leadership in education, manufacturing, pharmaceutical, animal health, financial services, non-profit, and Fortune 500 companies.

With over 25 years in leadership training and 13 years of coaching experience, Alexa helps her clients leverage their self-awareness, resilience, learning agility and interpersonal skills so they can bring their best selves to work and get amazing results. Creator of The Axela Group's unique SCAN™ coaching approach, Alexa is committed to equipping leaders to thrive in times of rapid change by giving them a repeatable framework for change agility. As a certified practitioner of Everything Disc®, Hogan 360, and EQ-I 2.0, Alexa has many tools to support clients in developing to their fullest potential.

A graduate of Human Synergetics's Culture Accreditation program, Alexa is adept at helping organizations make transformational shifts rooted in data that yield lasting results. Leveraging her training in human systems dynamics, neuroscience, and emotional intelligence she consults organizations in engaging their team members to drive the changes and pave the way to improved future states. As a team and transformation leader, Alexa is recognized for her insights, innovative approaches to complex issues, humanistic leadership, and disciplined drive for results as "Industry Rising Star" and "Pharmaceutical Industry Luminary" by the Healthcare Businesswomen's Association.

Prior to founding The Axela Group, Alexa was responsible for Leadership and Organizational Development in the US Animal Health business of Boehringer Ingelheim. In this broad role she was advisor and coach to the executive team; led and devised talent strategies; spearheaded the diversity, inclusion, culture and engagement (DICE) strategy for the division and led functional and organizational transformations.

Alexa is the President of The International Coaching Federation, Virginia Chapter, and is on the Community Advisory Board for the Junior League of Richmond. Alexa holds a Project Management Professional Certification from the Project Management Institute and is a graduate of Georgetown's Institute for Transformational Leadership, Leadership Coaching certificate program. Alexa is a two-time graduate of Virginia Commonwealth University. She holds a Bachelor's in English and a Master's in Teaching.

Kelsey Arico

Kelsey is the Lead Consultant and Vice President of Strategic Partnerships for The Axela Group. Her career experience includes roles in Change Management, Culture Strategy, Project Management, Communications, and Human Resources in manufacturing, healthcare, construction, pharmaceutical, and animal health companies.

Kelsey has managed and supported merger and acquisitions, site restructures, and HR Transformations, including acting as a Global Program Manager for a network of ~500 global change champions which went on to be recognized for the program's innovative design and achievements at the 2018 SABRE Awards. During the integration of two multinational organizations, Kelsey led the project to assess the combined entity's Diversity and Inclusion landscape and established culture-shifting programs as a result of the study to include engaging and equipping Executive Sponsorship, establishing a DEI task force, and catalyzing the creation and/or revitalization of employee-led Business Resource Groups.

Kelsey is an expert in workshop design and facilitation, is a certified Prosci Change Management practitioner and holds a BA in Sociology from the University of Virginia.

Natalie Garramone

For the past decade, Natalie has worked with teams--both nationally and internationally--to develop strategies aimed at fostering growth and innovation, shifting organizational culture, and engaging employees. She has supported large-scale culture change and innovation initiatives inside Fortune 500 companies such as Lowe's, Pfizer, and Honeywell - alongside sales, customer service, R&D, and new product innovation teams - to name a few.

Natalie will tell you that --regardless of size or industry--successful organizational change stems from micro-change at an individual level because, when you take away the devices, the buildings, and the titles, we're all just a bunch of people trying to do good work. That's why she loves figuring out what people care about and what motivates them. She loves building trust and creating safe spaces to power people and teams to do work they're proud of.

Her passion for integrating balance into her own life and the lives of others has motivated her to pursue and receive certifications in both Mindfulness-Based Stress Reduction (MBSR) as well as Mediation. Her career experience is grounded largely in growth strategy, change management, and organizational and leadership development, all of which have led her to her current area of expertise: conflict resolution and mediation.

She also happens to be a 200RYT (certified yoga instructor) but she prefers to incorporate elements of the practice--like interconnectedness, self-awareness, alignment, and mindfulness--

into her coaching and consulting as opposed to physically teaching. In addition to providing in-house mediation and coaching support for her clients, Natalie is an expert facilitator and trainer. Natalie received her Bachelor of Science in Business Administration from Itaca College.

Brief Description of The Change Decision

The Change Decision is a Small Woman-Owned (SWaM) change and culture consultancy focused on growing Joy at Work. Founded in 2016, it is majority owned by Roxanne Brown with the remaining minority stake owned by Ed Cook Ph.D., a military veteran.

The Change Decision specializes in three areas:

1. Change Management
2. Decision Analytics
3. Team Effectiveness

The clients of The Change Decision range from small businesses to the Fortune 200 as well as government agencies. The Change Decision has also regularly performed *pro bono* work for non-profits. The commonality is not in size or industry but rather in the strong desire of the leaders of the organization to make a significant improvement in their strategy or operations (through Change Management, Decision Analytics, or Team Effectiveness) as well as a positive impact on their culture, what The Change Decision calls growing Joy at Work.

Joy at Work is a measurable state of being (for both an individual and an organization) that indicates to what extent the culture of an organization contributes to its success. The Change Decision is actively researching what grows Joy at Work to understand what the practical steps are to increase team performance through the development of psychological safety and the building of emotional capital. All of this is in service to elevating Team Effectiveness. Decision-Analytics draws on the six decades of research on how groups can optimize decision-making (the core of a strategic planning process) so that they achieve a high level of decision hygiene which is a decision process where all objectives are considered against the field of possible alternatives. This process is called values-based decision-making. Change Management is the other side of the Decision-Change coin. This part of the approach sets up the plan to implement the decision especially focused on what people in the organization will need to do differently to implement the Strategic Planning. The Change Management aspect is crucial for moving past a plan that “sits on the shelf” and has little impact on the organization. A well-executed change, even one that is difficult, can strengthen the culture and grow Joy at Work.

Brief Description of Agile Immersive [proprietary]

Redacted

Organizational Design and Culture

The Dynamic Decision Team can deliver in multiple areas of Organizational Consulting all with the goal of making a lasting change on culture because culture change is what leads to lasting transformation. It is in guiding organizations to transformations that the complimentary capabilities of Agile Immersive and The Change Decision are realized to their fullest. For Virginia Tech, the inclusion of Jeff Legro, Ph.D. (former Provost of the University of Richmond) informs the work of the Dynamic Decision Team with a critical level of insight into what it takes for University Leadership to be successful.

The combination of core methodologies from the members of the Dynamic Decision Team like the Friction Less Enterprise and Joy at Work coupled with insights on challenges of universities from not only Jeff Legro, Ph.D. but also Thomas Lee Johnson, Roxanne Brown, Roe Messinger, and Alastair Walling who have taught as Adjuncts as well as Ed Cook, Ph.D. and Erin Donovan, Ph.D. who have taught full-time in both MBA and undergraduate programs brings a powerful potential to help guide Virginia Tech's Beyond Boundaries transformation.

Joy at Work Methodology (proprietary)

At its heart, the work The Dynamic Decision Team does is connected to the Ten Dimensions of Joy at Work which are outlined in the eBook: [A Guide to Joy at Work: Insights into a joyful work experience based on Joy Research](#) by Roxanne Brown and Ed Cook, Ph.D. The eBook was informed not only by the work the two principals have done over the last 30 years but also by research conducted with executives in businesses large and small.

The Ten Dimensions of Joy at Work

Participation	willingness to invest their unique capabilities and energy to contribute to achieving the group's goal.
Commitment	willingness to remain focused and keep promises even when achieving them becomes difficult and requires additional effort.
Accountability	willingness to be held to promises made that are expected of their role and of those they declare publicly.
Trust	willingness to risk being dependent on others for my personal success.
Belonging	willingness to be part of the group with the purpose of delivering their unique capabilities toward achieving the group's goal.
Cohesion	willingness to work with the group as a united force to achieve the purpose of the group.
Adaptability	willingness to consider new information and make a personal adjustment in service to achieve.

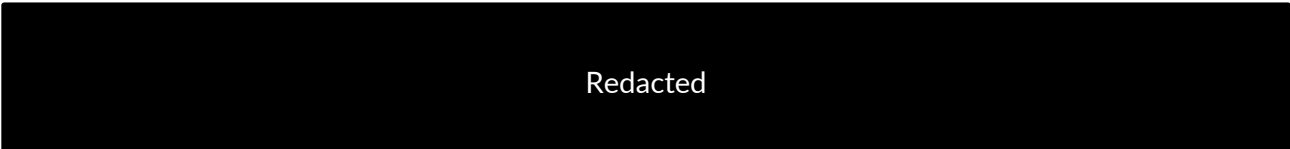
Growth	willingness to improve, explore, learn, integrate new information, and take on bigger and more complex tasks.
Respect	willingness to demonstrate an understanding of the unique value of others.
Integrity	willingness to behave ethically and in accordance with a moral code and personal set of values that are aligned with the group's values.



Redacted

Business Process Evaluation and Design [proprietary]

(HR, Finance, Administrative Operations, Academic Enterprise Management)



Redacted

Change Management

The Change Decision is one of the relatively few Qualified Education Providers (QEPs) approved by the Association of Change Management Professionals (ACMP) to be able to deliver change management classes that allow candidates to sit for the Certified Change Management Professional (CCMP) exam, the licensing exam for Change Practitioners. The Change Decision is also a leader in bringing Data-Driven Change Management to the forefront of the practice of Change Management.

Roxanne Brown holds the CCMP credential. She is also the former President of the Board of Directors for ACMP, and it is her welcome letter that introduces the Standard for Change Management, the core document that defines the profession.

The Dynamic Decision Team regards every organizational activity as including some level of change management. Dynamic Decision Team members, Ed and Roxanne, have been engaged in guiding small organizational changes to multimillion-dollar technology, process, and policy changes. An example of the latter is the implementation of a new compensation system at a Fortune 200 financial services company. This was the add-on to an existing system. The change management for that original system's implementation had been nearly non-existent and as a result, the system had a bad reputation. The goal for the change management for this new compensation system was to make the effort a non-event. This somewhat counterintuitive goal

was important for the culture of the company which would have viewed the integrity (one of the ten dimensions of Joy at Work) of the program team as lacking if the rollout was overly hyped as it had been with the original system.

Using a carefully constructed stakeholder network, Ed and Roxanne were able to understand the sentiment of the 10,000 managers who would use the system and implement tactics to help them both know how to use the new system and feel confident that they would be able to do it during the critical two weeks where they needed to make decisions about employee compensation. The result was a successful technical implementation and an error-free employee compensation decision period. Meaningfully, surveys showed that the sentiment about the entire system (and the HR team that was responsible for it) had improved dramatically. This increased the likelihood that the next inevitable change would be a success.

[The Change & Joy Methodology \(proprietary\)](#)

Redacted

Business Analytics

Analytics undergirds every aspect of the work of The Dynamic Decision Team. This is an aspect where Ed Cook Ph.D.'s experience as a corporate analyst as well as a professor of analytics in both the MBA and undergraduate programs at the University of Richmond comes into view. But it is also where Roxanne Brown's expertise as a Change Practitioner and TJ Johnson's expertise as a strategist in highly analytical environments also provide significant insight. The core distinction that The Dynamic Decision Team makes is between *interesting* and *useful* data. Business Analytics can be performed on either type of data; however, it is useful data that drives meaningful change. Although this notion is obvious, implementation can be difficult. The Dynamic Decision Team uses a technique that is based on a combination of two approaches: swing weights and a premortem. This approach ensures that the data gathered is useful.

An example of this is work done with a small company that delivers food to office grab-and-go markets. The issue they were dealing with was reducing the number of fresh food items that would go past their sell-by date and must be removed from the shelf and disposed of. This was generating about \$100,000 in cost per year with no revenue. Awash in data, the managers of the company were unable to make useful decisions in all the data noise. Ed approached the project in three phases. First, move the data from several disparate systems into an analytical database. Second, develop a forecasting model that would work for low-volume and high-volume clients, third, implement a change management plan that not only ensured operational success but also grew Joy at Work for the employees.

All three phases of this work were difficult for various reasons. The database phase required significant manipulation of the existing systems not because they were difficult to work with but because the resulting analytical database needed to be able to be operated by the managers of the company once Ed had completed the work. This required a high degree of reliability so that the managers, who were not experienced in database management, could be successful. The forecasting phase was challenging because of the variable nature of purchases for fresh food in a corporate office grab-and-go market. A key aspect turned out to be input from the delivery drivers who would learn non-forecastable information like an office party that might dramatically decrease sales. Obtaining information like that made the third phase of the project even more critical to immediate financial success. If the delivery drivers did not wish to participate in the effort (one of the ten dimensions of Joy at Work) then useful data would have been lost.

The result of the effort was an 80% decrease in the amount of food wasted which meant an \$80,000-a-year reduction in costs for this small company.

[Business Analytics Methodology\(proprietary\)](#)

Redacted

Project Development and Management [proprietary]

Redacted

Strategic Advisory Services [proprietary]

Redacted

Executive Coaching

The Dynamic Decision Team includes executive coaching in all aspects of the consulting work that it does, holding to the philosophy that “Before Change can happen, the leader must change first.” Roxanne Brown is a certified coach, and the Dynamic Decision Team includes other members with International Coaching Federation (ICF) credentials. The principals of The

Dynamic Decision team have had experience coaching executives in the Fortune 200, generals and admirals of the US Military, and CEOs of smaller companies and non-profits. That experience, coupled with the inside knowledge of university administration that Jeff Legro, Ph.D. brings, allows the Dynamic Decision Team to provide executive coaching for all levels of leadership at Virginia Tech.

Within consulting engagement executive coaching often becomes extensive. Even to the level of coaching an entire executive team. An example of that is the work that Ed and Roxanne are currently doing with a mobile application development firm. The firm has three members of the C-Suite (CEO, CFO, & CTO) and four members of the senior management team. Currently, Ed and Roxanne are coaching all seven members both individually and in groups. The coaching has included aspects of Change Management, Decision-Making, and Team Effectiveness. The goal has been to help the firm grow in both revenue and headcount so that it can be a more sustainable firm as well as one that can experiment more and take bets on future technologies.

The challenges faced by the firm were significant. When the work began, the three members of the C-Suite would rarely communicate and often miscommunicated when they tried. As a result, decision-making was poor and often did not result in the change desired. The four members of the senior management team struggled to execute the strategy of the firm because it was confusingly communicated, and decisions were often unclear. After working with the team for a few months, new structures were put in place to manage the firm. A revised Portfolio Review meeting was created and initially led by Ed to set a new pattern for how that important meeting could work. Similarly, weekly senior management meetings, monthly c-suite meetings, and quarterly owner meetings were reconstructed with agendas grounded in Joy at Work principles.


As a result of these efforts, the profitability of the firm has increased, and the headcount jumped by 25% over where they were before the engagement began. The firm has continued to retain Ed and Roxanne to manage through changes in delivery approach, the creation of an employee onboarding and personal development program, as well as the creation of a promotion program fitted into a new organizational design. This engagement continues today, and the firm has committed to the engagement through the end of the year.

Vendor Account Manager (Sec VII, A, 3)

RFP Description

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

	<p>[Redacted]</p> <p>[Redacted]</p>
Diversity Equity Inclusion and Belonging – Transformative Storytelling – “Shattering The Illusion of Otherness”	<p>[Redacted]</p> <p>Howard University</p> <p>[Redacted]</p>
Diversity Equity Inclusion and Belonging – Transformative Storytelling – “Shattering The Illusion of Otherness”	<p>[Redacted]</p> <p>Princeton Paul Robeson House</p> <p>[Redacted]</p>
Change Management Consulting and Executive Coaching	<p>[Redacted]</p> <p>Shockoe</p> <p>[Redacted]</p>
Fresh Food Forecasting Model Consulting	<p>[Redacted]</p> <p>Trolley House Refreshments</p> <p>[Redacted]</p>
Team Effectiveness and Decision Rights Consulting	<p>[Redacted]</p> <p>Workshop Digital</p> <p>[Redacted]</p>
Data Visualization Course	<p>[Redacted]</p> <p>Virginia Tech Richmond Center</p> <p>[Redacted]</p>

	
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Cost Proposal (Sec VII, A, 5)

RFP Description

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

Response from The Dynamic Decision Team

Consulting Methodology

[The Strategy Methodology \(proprietary\)](#)

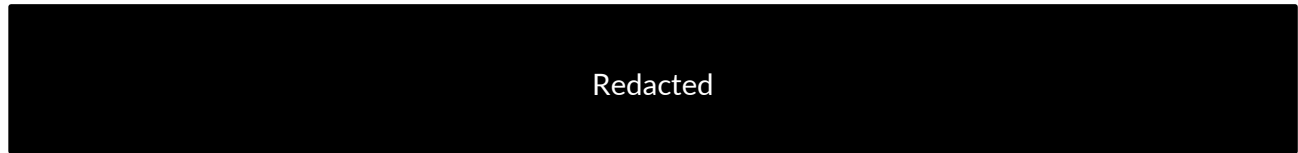
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[The Change Methodology \(proprietary\)](#)

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[The Business Analytics Methodology \(proprietary\)](#)

Redacted



Cost Table

Hourly rates are offered below. These are “ceiling” rates. The Dynamic Decision Team recognizes that at times state budgets can be constrained. To alleviate that issue should it arise, The Dynamic Decision team would be willing to discount the agreed upon rates by up to 10%.

Additionally, if it is better for Virginia Tech, The Dynamic Decision Team would create a fixed rate SOW based on the agreed upon rates or use a blended hourly rate of \$268.21 for a particular SOW.

Dynamic Decision Team	Name	Hourly Rate
Managing Consultant	Thomas Lee “TJ” Johnson	\$278.10
	Roxanne Brown	\$278.10
+ (Account Manager)	Ed Cook	\$278.10
	Jeff Legro	\$302.82
Senior Principle Consultant	Ash Shah	\$278.10
	Erin Donovan	\$278.10
	Alexa Beavers	\$278.10
Principal Consultant	Roe Messinger	\$265.74
	Alastair Walling	\$265.74
	Kelsey Arico	\$265.74
	Natalie Garramone	\$265.74
Senior Consultant	Darius Telfaire	\$228.66
	Sara Brunke	\$228.66

Capacity as a Small Woman-Owned Business (Sec VII, A, 6)

RFP Description

Demonstrate capacity and readiness to perform service and deliverables as described. Participation of Small, Women-owned and Minority-owned Business (SWaM) Business: If your firm is currently certified, you agree to maintain your certification for the life of the contract.

Response from The Dynamic Decision Team

In terms of capacity, the Dynamic Decision Team was formed to provide not only the combined set of services needed to aid in the realization of Virginia Tech's Beyond Boundaries initiatives but also to provide the depth of capacity needed by a major university. Both Agile Immersive and The Change Decision have access to other consultants to bring more skills, more experience, and more capacity to Virginia Tech. In fact, because the dynamic Decision Team is comprised of two SWaM-certified companies, the team presents itself as a much larger company because the networks of consultants are different and with complementary skills and experiences.

The Change Decision is currently registered with the Commonwealth of Virginia as Small Woman-Owned Business (SWaM) and will maintain that certification. The Change Decision will act as the lead company of the Dynamic Decision Team.

The screenshot shows the Virginia Department of Small Business and Economic Development (SBSDE) Directory Listing. The search results for 'the Change Decision' are displayed. The listing includes contact information for Roxanne M. Brown and a table of certification details.

The Change Decision	
Roxanne M. Brown 210 Rocketts Way Unit 012 Richmond, VA 23231 Phone: (804) 363-5891 Ext: Fax: roxanne.brown@thechangedecision.com www.thechangedecision.com	
Certification Number	[REDACTED]
SWaM Certification Type	
Women Owned Start Date	10-09-2018
SWaM Expiration Date	10-09-2023
NIGP Code and Description:	91800 CONSULTING SERVICES
Pcard	N
Business Category	Consulting Services

Agile Immersive is a SWaM-certification pending, Delaware LLC with principals and consultants with the full capacity and readiness to perform all of the work demonstrated in our proposal. Agile Immersive will maintain its SWaM-certification for the duration of the engagement with Dynamic Decision Team and Virginia Tech.

The screenshot shows a web browser window with the URL certification-app.sbsd.virginia.gov/boPortal/146895. The page features a progress bar at the top with five steps: Application, DBE Required Documents, Optional DBE Documents, SWaM Documents, and Submit. The 'SWaM Documents' step is currently active. Below the progress bar, the tracking ID is 828111. The main content area is split into two columns. The left column contains an 'Info' section stating: 'Your Application was submitted on Monday, April 24, 2023 4:51 PM.' The right column contains a numbered list of six steps: 1. Submit Application (Completed), 2. Pending Review (Pending), 3. Assignment (Pending), 4. Review (Pending), 5. Request for Additional Documentation (Pending), and 6. Decision (Pending). A curved arrow points from the 'Info' section to the 'Pending Review' step. At the bottom of the page, there are buttons for 'BACK', 'SUBMIT DBE ANNUAL DOCUMENTS', 'RECEIPTIFY SWaM', 'EDIT', and 'VIEW/PRINT APPLICATION'. The Windows taskbar at the bottom shows the date and time as 4:52 PM on 4/24/2023.

Delaware

The First State

Page 1

I, JEFFREY W. BULLOCK, SECRETARY OF STATE OF THE STATE OF DELAWARE, DO HEREBY CERTIFY "AGILE IMMERSIVE LLC" IS DULY FORMED UNDER THE LAWS OF THE STATE OF DELAWARE AND IS IN GOOD STANDING AND HAS A LEGAL EXISTENCE SO FAR AS THE RECORDS OF THIS OFFICE SHOW, AS OF THE TWENTY-FOURTH DAY OF APRIL, A.D. 2023.

AND I DO HEREBY FURTHER CERTIFY THAT THE SAID "AGILE IMMERSIVE LLC" WAS FORMED ON THE TWENTY-THIRD DAY OF MAY, A.D. 2018.

AND I DO HEREBY FURTHER CERTIFY THAT THE ANNUAL TAXES HAVE BEEN PAID TO DATE.



6898666 8300

SR# 20231589747

You may verify this certificate online at corp.delaware.gov/authver.shtml

Handwritten signature of Jeffrey W. Bullock in black ink, with a horizontal line underneath. Below the signature is the printed name "Jeffrey W. Bullock, Secretary of State".

Authentication: 203198298

Date: 04-24-23

Addendum #1 Diversity Equity, Inclusion, and Belonging

RFP Addendum #1 Description

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.

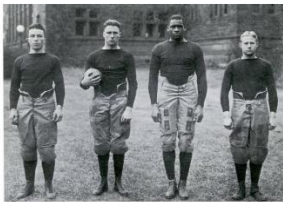
Response from The Dynamic Decision Team

Thomas Lee Johnson and Roe Messinger have led communities and classes in the power of DEIB transformative storytelling. Transformative storytelling unlocks the truth of Harmony in all human beings and enables us to relate to each other's Diversity, Inclusion, Equity and Belonging. Our [transformative storytelling \[video link\] https://youtu.be/zXD1RoFhitc?t=165](https://youtu.be/zXD1RoFhitc?t=165) approach shatters the illusion of otherness. The Transformative storytelling journey begins with a willingness to learn the historical truth of real people who shattered the illusion of otherness in their times, like Mr. Paul Robeson and his friend of twenty years Dr. Albert Einstein.



Mr. Robeson met and befriended Dr. Einstein at McCarter Theater in Princeton, New Jersey on October 31, 1935.

We Journey Into Three Moments of Illusion Shattering The Illusion of Otherness



1915



1924



14 1935

We all live our lives from the stories we tell ourselves and each other. As Virginia Tech considers its InclusionVT journey has it made Diversity, Inclusion, Equity and Belonging a strategic imperative for the university?

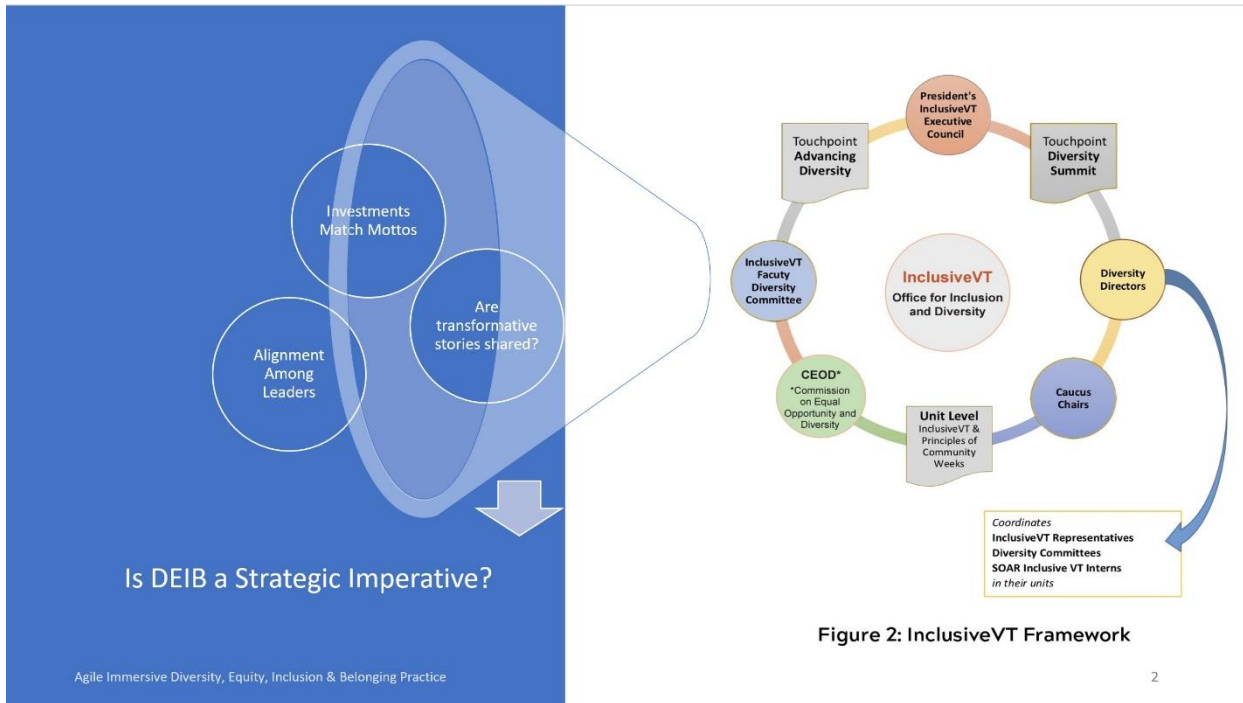


Figure 2: InclusiveVT Framework

Dynamic Decisions would start answering that crucial question by assessing and analyzing progress to previously set goals.

Assessment: What is Virginia Tech's progress in its Diversity, Equity, Inclusion & Belonging goals?

Goal 1: Increase representational diversity

Goal 2: Increase cultural competency

Goal 3: Address critical societal issues impacting humanity and equity

INITIAL MILESTONES:

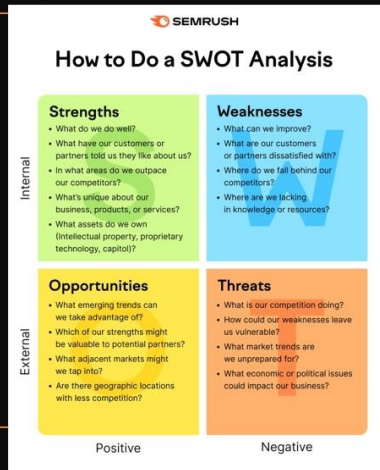
- Achieve 25% representation of underrepresented minority students in the entering class (freshmen and transfers) by 2022
- Achieve 40% representation of underrepresented minority or underserved students (Pell-eligible, first generation, and veterans) in the entering class (freshmen and transfers) by 2022
- Increase the total enrollment in the Corps of Cadets to 1400 by 2022
- Achieve 20% representation of underrepresented minority graduate and minority professional students by 2024
- Increase underrepresented minority faculty to 15% (which is equal to or greater than the mean Research (R1) Public Land-Grant Universities) by 2024
- Increase female faculty representation to 50% (which is equal to or greater than the mean Research (R1) Public Land-Grant Universities) by 2024
- Increase underrepresented minority faculty new hires to 25% annually by 2022
- Increase female faculty new hires to 50% annually by 2022
- Ensure 100% of graduate programs of study include a required cultural competency component by 2022
- Increase undergraduate students graduating with at least two Pathways courses that satisfy the Critical Analysis of Equity and Identity in the United States core concept to 25% by 2024
- Increase undergraduate students graduating with at least two Pathways courses that satisfy the Intercultural and Global Awareness integrative concept to 25% by 2024
- Increase representation of underrepresented minority staff and administrative and professional faculty to 25% by 2024

1. Expressed commitment to DEI	Gender	Race	LGBT	Disability
a) Our vision, mission statement, and/or strategic plan includes an expressed commitment to opportunity on the basis of...	Y	N	Y	N
2. Authorization of DEI in organizational policy	Gender	Race	LGBT	Disability
a) We have a policy for Board and staff diversity that covers...	Y	N	Y	N
b) We have a policy for investment advisor and vendor diversity.				Y
c) We have a policy for asset investment that supports DEI.				Y
d) Our grantmaking policy expects all grantees to address DEI.				Y
3. Implementation of DEI practices in operations	Gender	Race	LGBT	Disability
a) We actively engage diverse members of the Board and staff (e.g., distribute key assignments, capitalize on their strengths and networks).	Y	N	Y	N
b) We work to build an increasingly diverse pipeline of potential Board and staff members on the basis of...				Y
c) We work to expand the pipeline for greater diversity among investment advisors and vendors.				N/A
d) We actively work to diversify our donors on the basis of...	Y	N	Y	N
e) We have intentional processes for Board, staff, advisors, vendors to become DEI-informed and competent (e.g., orientations, training).				Y
f) Our grant and vendor payment processes accommodate recipients with limited organizational cash flow.				Y
4. Implementation of DEI practices in grant-making	Gender	Race	LGBT	Disability
a) We systematically access the perspectives of diverse grantees and constituent groups in the areas of...	Y	N	Y	N
b) We understand the ways in which inequities are produced and maintained on the basis of...	Y	N	Y	N
c) We understand how the various dimensions of diversity intersect/interact.				Y
d) We have specific investment strategies that address individual, institutional, and structural barriers on the basis of...	Y	N	Y	N
e) We intentionally fund diverse programmatic leadership on the basis of...	Y	N	Y	N
f) We factor into our funding decisions the grantee's ability to advance DEI.				Y
g) We fund capacity-building for diverse groups on the basis of...	Y	N	Y	N
h) We use our organizational advocacy and our position in the community to advance DEI.				Y
5. Use of accountability mechanisms to monitor DEI	Gender	Race	LGBT	Disability
a) We regularly collect, disaggregate, and publish data on Board, staff, advisor, vendor, grantee diversity by...	Y	N	Y	N

Agile Immersive Diversity, Equity, Inclusion & Belonging Practice

Dynamic Decisions would then step through the results of those assessments with key leaders and perform SWOT analysis on the outcomes.

Assessment: What is the level of maturity of VT confrontation of rejection, fear & otherness? SWOT Analysis



Inclusion SWOT Analysis	
(Internal) Strengths	(Internal) Weaknesses
<ul style="list-style-type: none"> • Employee diversity <ul style="list-style-type: none"> • U.S. employees: 43% minorities, 66% female • SVP+: 32% female, 19% minorities • Eight Diverse Partner Networks • Awards for "work on diversity and inclusion" 	<ul style="list-style-type: none"> • High price points exclude individuals with lower discretionary income • Generalized standards reduce products' cultural alignment with local target markets & consumer preferences • Narrow understanding of "diversity"
(External) Opportunities	(External) Threats
<ul style="list-style-type: none"> • Response to April 2018 incident - opportunity to be proactive and systemic • Drive leader accountability for D&I outcomes • Benchmarks for supply chain and contractor diversity 	<ul style="list-style-type: none"> • Other markets may dismiss U.S.-centric D&I programs based • Lack of diversity in customer base • Credibility, lack of trust

Agile Immersive Diversity, Equity, Inclusion & Belonging Practice

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We could then benchmark Virginia Tech's DEIB progress with other higher education institutions like Johns Hopkins University:



Agile Immersive Diversity, Equity, Inclusion & Belonging Practice

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Montgomery College of Maryland has an action plan with measurable goals and a Strategic Direction that could be instructive for Virginia Tech as it reassesses InclusiveVT next steps:

Strategic Direction, Mission and Operations for Diversity, Equity, Inclusion & Belonging

Agile Immersive Diversity, Equity, Inclusion & Belonging Practice



Dynamic Decision leverages best-in-breed Diversity, Equity, Inclusion and Belonging materials from Deloitte, Price Waterhouse Coopers and many other DEIB consultancies so that our clients DEIB Training Strategy is always world-class and empowering. DEIB Training always starts with leadership and then cascades across the work force:

Diversity, Equity, Inclusion and Belonging Training Strategy

FIGURE 4 | Inclusive leadership and team performance



Source: Based on Deloitte Australia's analysis of 105 leaders as assessed by 600 raters against the six signature traits of inclusive leadership and perceived performance outcomes.

Agile Immersive Diversity, Equity, Inclusion & Belonging Practice

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Long term DEIB success requires a university wide commitment to sustained maturity and a willingness to exemplify the ideals it communicates:

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.

The Change Decision response – The current Redacted Copy covers all concerns.

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

The Change Decision response – N/A

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?

The Change Decision 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?

The Change Decision 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?

The Change Decision 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.

The Change Decision response – 5 business days

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?

The Change Decision response – Yes, excluding any proprietary products and processes as outlined in our RFP response.

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

The Change Decision 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?

The Change Decision 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?

The Change Decision response – Yes

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

The Change Decision 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.

The Change Decision response – Roxanne Brown is the CEO of the Change Decision and will deliver some of the services in the contract. She is well aware of this solicitation and is personally committed to delivering the highest quality services to Virginia Tech. Dynamic Decision partner firm (Agile Immersive) is led by CEO & Founder Thomas Lee Johnson, who contributed to the content of our proposal and will be a part of our service delivery and is committed to the best possible service Virginia Tech could expect.

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?

The Change Decision response – The Change Decision and Agile Immersive make up the Dynamic Decision Team which will deliver the wide variety of services to Virginia Tech under this solicitation. Both companies are SWaMs so the commitment to quality is what keeps small businesses like ours flourishing. Virginia Tech will be an important client for both companies and therefore receive considerable attention. Monthly contact with departments and regular attention to customer service will be the minimum we will do.

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?

The Change Decision response – Yes. We have automated tools and access to an extensive roster of consultants. As Virginia Tech needs grow we can scale across all staff, campuses, and departments.

15. Please provide your best and final price structure?

The Change Decision response – The pricing provided in our RFP is our best and final price structure, but we do offer volume discounts and other benefits.

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

The Change Decision response – Our understanding is that the contract start date is January 1st, 2024. We will be ready to provide services then. If Virginia Tech needs services before that date, we are capable of delivering earlier.

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

The Change Decision 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?

The Change Decision response - Yes

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

The Change Decision 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?

The Change Decision 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?

The Change Decision response – The Change Decision is a certified SWaM with the Virginia Department of Small Business and Supplier Diversity and will remain certified as a SWaM.

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?

The Change Decision response – Yes. The Change Decision and Agile Immersive have agreements with other certified SWaM businesses in case more consultants are needed.

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

The Change Decision response - Yes