

RADFORD UNIVERSITY

**PROCUREMENT AND CONTRACTS
P.O. BOX 6885
501 STOCKTON STREET
RADFORD, VA 24142**

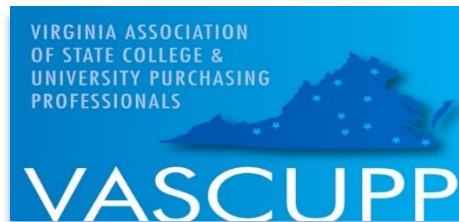
REQUEST FOR PROPOSAL

R20-008

TITLE

Marketing Strategy and Media Placement

FEBRUARY 10, 2020



RADFORD UNIVERSITY IS A PROUD MEMBER OF VASCUPP

REQUEST FOR PROPOSAL
RFP # R20-008

ISSUE DATE: February 10, 2020

TITLE: Marketing Strategy and Media Placement

ISSUING AGENCY: **RADFORD UNIVERSITY**
Procurement and Contracts
David E. Armstrong Complex, 501 Stockton St.
Post Office Box 6885
Radford, VA 24142-6885

PERIOD OF CONTRACT: July 1, 2020 through June 30, 2021 with four (4) one-year renewal options **or as negotiated.**

SEALED PROPOSALS DUE DATE/TIME: March 16, 2020 up to and including 3:00 PM Eastern Standard Time
Proposals received after the due date and time or electronic submission of proposals will not be accepted. Procurement and Contracts mailing address is as follows:

RADFORD UNIVERSITY
Procurement and Contracts Department
David E. Armstrong Complex
501 Stockton Street [Courier Physical Address]
Post Office Box 6885
Radford, Virginia 24142

OPTIONAL PRE-PROPOSAL CONFERENCE: **Wednesday, February 26, 2020 at 3:00 PM.** Please notify Teresa Anders at tanders@radford.edu or 540-831-6097 no later than close of business on **Friday, February 24, 2020** if you will be attending the conference and whether you plan to attend in person or via teleconference. **See section XI for further details regarding the pre-proposal conference.**

QUESTIONS/INQUIRIES: All inquiries for information shall be directed to: Teresa Anders via email at tanders@radford.edu or via phone at 540-831-6097. **Please submit any questions to be addressed at the pre-proposal conference no later than close of business on February 24, 2020.**

PUBLIC POSTING: Reference section 2) D) 1 – *Commonwealth of Virginia Procurement Manual for Institutions of Higher Education and their Vendors* [VASCUPP](http://vascupp.org) Public notices shall be published on the Department of General Services central electronic procurement website, eVA (<http://eva.virginia.gov>), under Sourcing and Contracting on the eVA home page. This is the only electronic source used by Radford University's Procurement and Contracts Department to electronically post the RFP document and subsequent Addenda.

LATE PROPOSALS: To be considered for selection, proposals must be received by Procurement and Contracts by the designated date and hour. The official time used in the receipt of proposal is that time on the automatic time stamp machine in the Procurement and Contracts Department. Proposals received in the Procurement and Contracts Department **after** the date and hour designated are automatically disqualified and will not be considered. Procurement and Contracts is not responsible for delays in the delivery of mail by the U.S. Postal Office, private couriers, or the interuniversity mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the Procurement and Contracts Department by

the designated date and hour. *Proposal receipt scheduled during a period of suspended state business operations will be rescheduled for processing at the same time on the next regularly scheduled business day.

UNIVERSITY CLOSINGS: If the University is closed as a result of an act of God or an emergency situation, the University’s website shall post notices of said closings. It is the responsibility of the Offeror to check the website at www.radford.edu for said notices. If the University is closed on the day proposals are due they will be accepted the same time the next scheduled business day the University is open. If the University is closed on the day of the scheduled pre-proposal conference a written addendum will be issued to officially reschedule the conference.

In compliance with this Request for Proposal and to all conditions imposed therein, the undersigned offers and agrees to furnish the goods/services described at the prices indicated in Attachment [G]– **Financial Proposal.**

Legal Name and Address of Firm (Type or Print):

| | | |
|---|-------------|--------|
| Name: | Date: | |
| Street: | Signature: | |
| PO Box: | Print Name: | |
| City/State/Zip: | Title: | |
| FEI/FIN/SS No.: | Telephone: | |
| eVA Vendor ID No.: | Fax: | Email: |
| <p>Check all that apply: <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Individual</p> <p>Department of Small Business and Supplier Diversity (DSBSD) Certification No. _____ and Expiration Date: _____ Certification Category: <input type="checkbox"/> Woman-Owned <input type="checkbox"/> Minority-Owned <input type="checkbox"/> Small Business (www.sbsd.virginia.gov) for additional information.</p> <p>eVA Virginia's eProcurement Portal Registered: Yes <input type="checkbox"/> - eVA Vendor ID# _____</p> <p>Commonwealth of Virginia State Corporation Commission registration number: _____</p> | | |

Note: This public body does not discriminate against faith-based organizations in accordance with §36 of the Governing Rules or against a bidder or Offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

RFP Table of Contents

| <i>Section</i> | <i>Sub Section</i> | <i>Document</i> | <i>Page #</i> |
|----------------|--------------------|--|---------------|
| | | Inside Cover Page, Requires Information and Signature | 2 |
| I | | Purpose | 5 |
| II | | Background | 5 |
| III | | Contract Participation (cooperative contract) | 6 |
| IV | | Contract Administration | 6 |
| V | | Small, Woman-Owned and Minority Owned (SWaM) Participation | 6 |
| VI | | Intentionally Left Blank | 6 |
| VII | | Statement of Needs | 7 |
| VIII | | Proposal Preparation and Submission Requirements | 7 |
| IX | | Evaluation and Award Criteria | 10 |
| X | | Reporting and Delivery Requirements | 10 |
| XI | | Optional Pre-Proposal Conference with Conference Remote Option | 11 |
| XII | | Intentionally Left Blank | 11 |
| XIII | | Invoicing and Payment | 11 |
| XIV | | Attachments Listing | 12 |
| | A | Sample Contract Form | 13 |
| | B | General Terms and Conditions | 15 |
| | C | Special Terms and Conditions | 16 |
| | D | Offeror Data Sheet | 18 |
| | E | COVA W-9 Request for Taxpayer Identification Number and Certification Form | 21 |
| | F | SWaM Utilization Plan | 22 |
| | G | Financial Proposal | 24 |
| | H | Zone Map | 25 |
| | I | RFP Response Checklist | 26 |

I. PURPOSE

- A. The intent and purpose of this Request for Proposals (RFP) is to solicit proposals from qualified sources to establish a contract through competitive negotiations with one qualified contractor to provide the expertise and services of a fully functional marketing entity to assist with recruitment and general awareness. Expertise and awareness fall within the categories of strategy, placement, and analytics as outlined herein. Services are to be provided to Radford University, (hereinafter referred to as “RU”, or “the University”), an agency of the Commonwealth of Virginia.

II. BACKGROUND

A. University Background:

Radford University is a comprehensive public university of 11,870 students that has received national recognition for many of its undergraduate and graduate academic programs, as well as its sustainability initiatives. Radford University serves the Commonwealth of Virginia and the nation through a wide range of academic, cultural, human service and research programs. Well known for its strong faculty/student bonds, innovative use of technology in the learning environment and vibrant student life on a beautiful 204-acre American classical campus, Radford University offers students many opportunities to get involved and succeed in and out of the classroom. The University offers 76 bachelor’s degree programs in 47 disciplines, three associate degrees, and six certificates at the undergraduate level; 27 master’s programs in 22 disciplines and six doctoral programs at the graduate level; and 14 post-baccalaureate certificates and one post-master’s certificate. A Division I member of the NCAA and Big South Conference, Radford University competes in 16 men’s and women’s varsity athletics. With over 300 clubs and organizations, Radford University offers many opportunities for student engagement, leadership development and community service. In addition to robust academic offerings and engaging student experiences on the main campus located in Radford, Virginia, Radford University also offers a clinical-based educational experience for more than 1,000 students living and learning in Roanoke, Virginia as part of Radford University Carilion, a public-private partnership focused on the cutting-edge delivery of health sciences programming, outreach and service.

Specific Background:

University Relations is comprised of writers, designers, photographers, videographers, digital strategists, creatives, and leaders who work to collaboratively advance the brand of Radford University through marketing, communications, media engagement, digital, and creative services. Members of this area have strong educational backgrounds paired with significant industry and higher education experience.

TOP PRIORITIES OF UNIVERSITY RELATIONS INCLUDE:

- Share the Radford University brand across campus, within the local community, the Commonwealth of Virginia, and beyond.
- Promote the achievements of the students, faculty, staff, and alumni.
- Directly support admissions, advancement, and alumni relations efforts.
- Engage with internal stakeholders from the Radford University family to support marketing, communications, media, and creative service needs.
- Implement and advance relevant initiatives as outlined in the [2018-2023 Strategic Plan](#).

At present, University Relations is accomplishing its priorities with a combination of in-house talent, collaboration with enrollment management and admissions, and external partnerships. The creative services team is conceptualizing and executing all creative work necessary for all campaigns. External partners provide strategy creation, media placement and analytics monitoring for the broad campaigns running across traditional and digital tactics.

III. CONTRACT PARTICIPATION

- A. Under the authority of §6 of the Rules Governing Procurement of Goods, Services, Insurance and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia (copy available at [VASCUPP web site](#)). The intent of this solicitation and resulting contracts is to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions or lead issuing institution's affiliated corporations may access any resulting contract if authorized by the contractor. Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) may be extended to the entities indicated above to purchase at contract prices in accordance with the contract terms. The Contractor shall notify the lead-issuing institution in writing of any such entities accessing the contract. 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. Participating entities shall place their own orders directly with the Contractor and shall fully and independently administer their use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from Radford University. Radford University 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 Radford University 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.

Please refer to Attachment H, Zone Map, if the offeror wishes to submit a separate pricing structure based on approved zones for cooperative institutions. If no other prices are offered, pricing provided will apply to all zones in the Commonwealth. If you wish to provide pricing for a zone other than which this solicitation originated, please indicate you are doing so in the response. If you anticipate pricing differentials for different zones, separate pricing structures must be submitted for each zone that includes appropriate for pricing that zone.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as the need may be. Please contact the buyer for additional information.

- IV. **CONTRACT ADMINISTRATION:** Radford University assigns "Contract Administrators" to each contract awarded. The Contract Administrator shall be the initial point of contact for the Contractor. Contract Administrators are charged with ensuring the terms and conditions of the contract are followed, payments are made in accordance to the contractual pricing schedule, and reporting noncompliance issues to the Procurement and Contracts Department at Radford University. Contract Administrators **do not** have the authority to authorize changes and/or modifications to the contract. Should noncompliance issues exist and cannot be resolved at this level or changes/modifications to the contract are required, the assigned Contract Officer in the Procurement and Contracts Department must be notified immediately by the Contract Administrator. The assigned Contract Administrator is the Chief of Staff and Vice-President of University Relations.

- V. **SMALL, WOMAN-OWNED AND MINORITY-OWNED (SWAM) PARTICIPATION:** It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities and to encourage their participation in state procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses, and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities.

Radford University has established SWaM goals that are posted to the Procurement and Contract website. Links to the University's SWaM initiative can be located at: [Procurement and Contracts | Radford University](#).

See **Attachment F** for information on reporting spend data with subcontractors and a SWaM Table (Table A only) to complete and submit in the proposal.

VI. INTENTIONALLY LEFT BLANK

VII. STATEMENT OF NEEDS

General:

Radford University is seeking an extension of the professional branding, creative, and marketing team housed within the Office of University Relations to develop a comprehensive annual media and marketing plan utilizing traditional, digital, and emerging engagement and messaging platforms. The plan, which should employ best practices and a strategic approach, will need to be executed and tracked on behalf of the University by directly facilitating all marketing and media placement and trafficking as outlined in the final approved plan.

The University is also seeking access to detailed analytics in the form of comprehensive and reoccurring reports, thereby providing an overview of strategy effectiveness with the ability to modify the approaches and deliveries based on actionable and measurable outcomes.

In order to develop and maintain a collegial environment and strong partnership, the University will engage in regular meetings and interactions with the fully-functional marketing entity in order to ensure the development, execution, and effectiveness of the overall strategy and specific placements with a strong focus on analytics. As a result, The University is keenly interested in the development of and access to an online platform providing real-time analytics.

The University has sufficient in-house expertise for the development of creative assets and related messaging, but seeks a collaborative partner for the strategy, placement, and analytics associated with the thoughtful development and successful execution of the University's broad-based messaging and related strategy for the purpose of student recruitment and general awareness. Furthermore, the University is looking to build a lasting and meaningful partnership with an energetic and innovative entity, which is both aligned with and guided by the University's mission, vision, and core values, while at the same time being proactive to University needs and reactive to industry developments.

The Contractor shall furnish all labor, insurance, materials, equipment, supervision, and incidentals necessary to provide said services to the University.

VIII. PROPOSAL PREPARATION AND SUBMISSION

A. GENERAL INSTRUCTIONS:

1. **RFP Responses:** In order to be considered for selection, the Offeror shall submit to the University a complete response to this RFP. Proposals shall be a combination of **paper and electronic documents as detailed below, each containing full identical content including all attachments.**

Format: Electronic file shall be text searchable using common business software, such as Adobe, Microsoft Word and Microsoft Excel.

Media: Include all of the following:

PAPER DOCUMENTS

One (1) paper **original signed** document

ELECTRONIC DOCUMENTS

One (1) complete electronic proposal, inclusive of all attachments, on individual USB drive
REDACTED ELECTRONIC DOCUMENT

One (1) redacted electronic proposal on a USB drive labeled **FOIA**

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

VFOIA (Virginia Freedom of Information Act) – The one redacted FOIA proposal contains identical content, however it blacks out information that is personally identifiable (such as FIN) and, if applicable, any trade secrets and proprietary information for which the Offeror must invoke in writing the protections of the [Code of Virginia 2.2-4342, Public Inspection of Certain Records](#) .

2. **Contact:** Communications regarding this Request for Proposal (RFP) shall be formal from the date of issue until either a Contractor has been selected or the University Procurement and Contracts Department rejects all proposals. Formal communications, including but not limited to, request for information, comments or speculations regarding this RFP to any University employee other than a Procurement and Contracts representative may result in the offending Offeror's proposal being rejected.
3. **Proposal Presentation:**
 - **Sign and Complete:** Proposals shall be signed by an authorized representative of the Offeror. See page 3. *The original proposal must be clearly marked on the outside of the proposal.* All information requested must be submitted. Failure to submit all information requested may result in the University 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 the University. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation. All information requested by this Request for Proposal on the ownership, utilization, and planned involvement of small businesses, women-owned businesses and minority-owned businesses must be submitted. See **Attachment F**. If an Offeror fails to submit all information requested, the University may require prompt submission of missing information after the receipt of proposals.
 - **Concise & Clear:** Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
 - **Organization:** 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 attachment, paragraph number, sub letter, 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 sub letter 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 the RFP requirements are specifically addressed.
 - **Word Usage:** As used in this RFP, the terms “must”, “shall”, “should” and “may” identify the criticality of requirements. “must” and “shall” identify requirements whose absence will have a major impact on the suitability of the proposed solution. Items labeled as “should” or “may” are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual “must” and “shall” items may not be fully satisfied, but it is the intent to satisfy most, if not all, “must” and “shall” requirements. The inability of an Offeror to satisfy

a “must” or “shall” requirement does not automatically remove that Offeror from consideration; however, it may seriously affect the overall rating of the Offeror's proposal.

- **Binding, Ownership:** The original proposal and copies if requested, should be bound or contained in a single volume where practical (ex: ring binder, spiral bound, stapled, etc.). All documentation submitted with the proposal should be contained in that single volume. Ownership of all data, materials and documentation originated and prepared for the state pursuant to the RFP shall belong exclusively to Radford University and be subject to public inspection in accordance with the Virginia Freedom of Information Act as specified in General Terms and Conditions.
 - **Legal Agreement:** Unless noted in the proposal, a signed and submitted proposal certifies that the firm’s principals or legal counsel has reviewed the Request for Proposal General Terms and Conditions and the Special Terms and Conditions and agrees that these provisions will become a part of any final agreement, and that the principals or legal counsel has reviewed and approved the firm’s entire proposal prior to submission to the University.
4. **Presentations:** Offerors who submit a proposal in response to this RFP may be invited to give a presentation of their proposal to the University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a **fact finding** and **explanation** session only and does not include negotiations. The University will schedule the time and location of these presentations. Presentations are an option for the University and may or may not be conducted.

Radford University expects Offerors who are invited to give an oral presentation will utilize the person or persons who will be working on the project to conduct the presentation so quality and experience of the contractor’s staff can be evaluated prior to making the selection. See **Section XII** for the estimated schedule.

B Specific Proposal Requirements: Proposals should be as thorough as possible so that Radford University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

1. **Complete and Sign:** The return of the completed RFP inside cover sheet (See page 3) and addenda acknowledgements, if any, signed, and filled out as required.
2. **Qualifications and Relevant Experience:** Describe your experience in providing services as outlined in this RFP. Provide an overview of how long you have been in business detailing the names, qualifications and experience of personnel to be assigned should be awarded a contract. Include an organizational chart, individual qualifications, experience, etc. **Provide references as directed in Attachment D.**
3. **Capabilities and Capacity:** Provide information detailing your capabilities and capacity to fulfill the Statement of Needs of this RFP (i.e., analytics, strategy and placement of media opportunities.)
4. **Approach and Methodology:** Describe your approach and methodology to:
 - Supporting the Office of University Relations to develop a comprehensive annual media and marketing plan.
 - Utilizing traditional, as well as digital, platforms.
 - Comprehensive reporting.
 - Online platforms and real time analytics.
5. **Financial Proposal:** Provide a fee structure associated with goods and services proposed to fulfill requirements. This should incorporate financial considerations such as labor costs, overhead, contingency budgets, etc. See **Attachment G**. This is a template for your use; however, you can provide your own financial document.

6. **Identification on Proposal Envelope:** The signed proposal should be returned to the University to the attention of the identified Contract Officer in a sealed envelope or package with the following identifying information on the outside of the sealed envelope/package:

| | |
|------------------------------|--|
| Name of Offeror: | RFP# R20-008 |
| Address: | Due Date: March 16, 2020 Time: 3:00 PM EST |
| | RFP Title: Marketing Strategy and Media Placement |
| City, State, Zip Code | Name of Contract Officer: Teresa C. Anders |

IX EVALUATION AND AWARD CRITERIA

- A. **Evaluation Criteria:** Proposals will be evaluated for full compliance with the RFP requirements and the mandatory terms and conditions set forth within the RFP document. The objective of the Radford University Evaluation Committee will be to select the contractor that is most responsive to the herein described needs and represents the best value for Radford University.

The proposals will be evaluated by Radford University using the following weighted evaluation criteria.

| | Evaluation Criteria | Percentage of Points |
|---|---|-----------------------------|
| 1 | Qualifications and Relevant Experience | 25% |
| 2 | Capabilities, Skills, and Capacity | 30% |
| 3 | Approach and Methodology | 20% |
| 4 | Financial Proposal | 15% |
| 5 | SWaM - Participation of Small Businesses and Businesses Owned by Women and Minorities | 10% |
| | TOTAL | 100% |

- B. **Award of Contract:** 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 criteria included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offers so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each Offeror so selected, the University shall select the Offeror which, in its opinion, has made the best proposal, and shall award the contract to that Offeror. The University may cancel this Request for Proposal or reject proposals at any time prior to award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous (*Code of Virginia, § 2.2-4359D*) [Code Section 2.2-4359D](#). Should the Commonwealth determine in writing and in its sole discretion that only one Offeror is fully qualified, or that one Offeror is clearly more highly qualified than the others under consideration, 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 the solicitation and the contractor's proposal as negotiated.

X REPORTING AND DELIVERY REQUIREMENTS

- A. During active campaigns, the University will require monthly reports to provide data on progress, areas of strength, and opportunities for improvement. Such reports must blend quantitative data with commentary that provides context and associated next steps. It is desired that the analytics reports prompt interaction between the Contractor and the University such that the marketing and campaign efforts can continuously improve.

Items that are required within analytics reports include overall impressions and/or reach, engagement rates, best performing creative, and worst performing creative, if applicable.

The Offeror should provide sample analytics reports and information surrounding their ability to satisfy the aforementioned reporting and delivery requirements.

- B. The Contractor shall provide a quarterly report to the Radford University Director of Strategic Sourcing and Supplier Diversity detailing the small business subcontractor spending if SWaM subcontracts are utilized. See **Attachment F**.

XI. OPTIONAL PRE-PROPOSAL CONFERENCE (in-person or by phone) **Please notify Teresa Anders at tanders@radford.edu or 540-831-6097 no later than close of business on February 24, 2020 if you plan to attend the optional pre-proposal conference and whether you will attend in person or via teleconference. If you elect to attend via teleconference you will be required to provide your email address in order to receive a teleconference notification email providing details to access the teleconference.**

- A. An optional pre-proposal conference will be held **February 26, 2020 at 3:00 PM Eastern Standard Time** in the Procurement and Contracts Conference Room located in the Armstrong Complex. The street address is 501 Stockton Street, Radford, VA 24142. While attendance at this conference will not be a prerequisite to submitting a proposal, Offerors who intend to submit a proposal are encouraged to attend. It is recommended you have a copy of the solicitation readily available to review during the pre-proposal conference.
- B. The purpose of the conference is to allow potential Offerors an opportunity to present questions and requests for clarification, with final responses provided in an RFP Addendum that is published to eVA [eVA - Virginia's eProcurement Portal](#). The Addendum will include any updates to the RFP, including changes and questions with answers.

XII. INTENTIONALLY LEFT BLANK

XIII. INVOICING AND PAYMENT:

- A. The Contractor shall submit a fully itemized invoice that references the Radford University contract number, material description, quantities and unit prices, and Purchase Order number, if applicable. Payment will be made thirty days after receipt of proper invoice for the amount of payment due, or thirty days after receipt of goods / services, whichever is later, in accordance with the [Commonwealth of Virginia Prompt Payment Act](#). Mail or Email Invoice(s) to:

**RADFORD UNIVERSITY
ACCOUNTS PAYABLE
POST OFFICE BOX 6906
RADFORD, VA 24142-6906
Email: acctspayable@radford.edu**

XIV. ATTACHMENTS

- Attachment A – Sample Contract Form
- Attachment B – General Terms and Conditions
- Attachment C – Special Terms and Conditions
- Attachment D – Offer Data Sheet
- Attachment E – COVA W9 Request for Taxpayer
Identification Number and Certification
- Attachment F – SWaM Utilization Plan
- Attachment G – Financial Proposal
- Attachment H – Zone Map
- Attachment I - RFP Response Checklist

RFP R20-008 - Attachment A - SAMPLE CONTRACT

FOR REFERENCE ONLY - DO NOT COMPLETE



COMMONWEALTH OF VIRGINIA STANDARD CONTRACT

Contract Number: Rxxxxx

This contract entered into this ___ day of _____, 20__, by _____, located at (insert complete physical address), hereinafter called the "Contractor" and Commonwealth of Virginia, **Radford University**, called the "Purchasing Agency, located at 801 East Main Street, Radford, VA. 24142."

- I. **WITNESSETH** that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements contained, agree as follows:
- II. **SCOPE OF WORK:** The Contractor shall provide the goods/services to the Purchasing Agency as set forth in the Contract Documents.
- III. **TERM OF CONTRACT:** From _____ through _____ with _____ **(1) year renewal options or as negotiated, to include all contractual provisions contained herein.**
- IV. **THE CONTRACT DOCUMENTS SHALL CONSIST OF:**
 - A. This signed form (Radford University Commonwealth of Virginia's Standard Contract inclusive of Commonwealth of Virginia General Terms and Conditions-Radford University and Special Terms and Conditions.
 - B. Radford University's Request for Proposal (RFP) Rxx-xxx dated _____, Addendum xxx dated _____ (list all addendums in this format). (Attachment A);
 - C. Contractor's Proposal signed and dated _____ (Attachment B);
 - D. Contractor's supplemental contract correspondence (Attachment C); (e.g., clarification and negotiation points) dated as follows:
 1. (list each document by title and execution date)
 - E. This Standard Contract identifies terms as negotiated and as agreed by both parties. In the event there is a conflict between the Standard Contract, Request for Proposal # Rxx-xxx, the Contractor's Proposal or Negotiation/Clarification points, the Standard Contract shall prevail.
- V. **FINANCIAL CONSIDERATIONS:**
- VI. **CONTRACT ADMINISTRATION:** [Include CA Special Term listing CA title with all contact information.]
- VII. **COMMONWEALTH OF VIRGINIA GENERAL TERMS AND CONDITIONS:**
- VIII. **SPECIAL TERMS AND CONDITIONS:** (Insert all applicable T/C's from the template located on the Procurement forms folder.)

IX. **GOVERNING RULES:** This Contract is governed by the provisions of the Restructured Higher Education Financial and Administrative Operations Act, Chapter 4.10 (§23-38-88 et seq.) of Title 23 of the Code of Virginia, and in particular § 23-38.90 of the Restructuring Act, referred to as the *“Governing Rules”* and the *Purchasing Manual for Institutions of Higher Education and Their Vendors.*”

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

CONTRACTOR:

RADFORD UNIVERSITY

Print Name: _____

Print Name: _____

Title: _____

Title: _____

Signature: _____

Signature: _____

Date: _____

Date: _____

RFP R20-008 - Attachment B - General Terms and Conditions-Mandatory

Radford University mandatory General Terms and Conditions are incorporated into this Request for Proposal by reference. It is the Offeror's responsibility to access the document by clicking on the link below. These terms and conditions are deemed mandatory for each solicitation issued by Radford University. The Offeror agrees to these mandatory General Terms and Conditions.

[RADFORD UNIVERSITY GENERAL TERMS AND CONDITIONS](#)

RFP R20-008 - Attachment C

Preferred - Special Terms and Conditions

1. **ACCEPTANCE PERIOD:** Any bid/proposal submitted in response to this solicitation shall be valid for (180) days. At the end of the (180) days, the bid/proposal may be withdrawn at the written request of the bidder/Offeror. If the bid/proposal is not withdrawn at that time, it remains in effect until an award is made or the solicitation is canceled.

2. **ADDITIONAL GOODS AND SERVICES:** The University may acquire other goods and services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services as negotiated under the same 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 that are newly introduced during the term of this contract. Such additional goods and services will be provided to the University at favored nations pricing. The exact pricing of these good and services will be determined at the time of procurement.

3. **CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION:** The Contractor assures that the information and data obtained as to personal facts and circumstances related to students or staff will be collected and held confidential, during and following the contract, and unless disclosure is required pursuant to court order, subpoena or other regulatory authority, will not be divulged without the individual's and the University's written consent and only in accordance with federal law or *Code of Virginia*. Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the University of any breach or suspected breach in the security of such information. Contractors shall allow the University to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

4. **CONTINUITY OF SERVICES:**
 - A. The Contractor recognizes that the services under this contract are vital to the University and must be continued without interruption and that, upon contract expiration, a successor, either the University or another Contractor, may continue them. The Contractor agrees:
 - To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
 - To make all University owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the contract to facilitate transition to successor; and
 - That the University Contract Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.

 - B. The Contractor shall, upon written notice from the Contract Office, furnish phase-in/phase-out services for up to ninety (90) days after this contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Contract Officer's approval.

 - C. The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in/phase-out

operations) and a fee (profit) not to exceed a pro rata portion of the fee (profit) under this contract. All phase-in/phase-out work fees must be approved by the Contract Officer in writing prior to commencement of said work.

5. **CONTRACTOR PERSONNEL:** All employees of the Contractor shall comply with the rules, regulations, policies and procedures of the University and shall maintain proper conduct. In the event the University finds, at its sole discretion, that an employee of the Contractor is objectionable to the University that employee shall be removed by the Contractor from the University grounds and shall not again be employed by the Contractor on University grounds until approved by the University.
6. **INDEMNIFICATION:** Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any 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/any services of any kind or nature furnished by the Contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the issuing agency to use the materials, goods, or equipment in the manner already and permanently described by the Contractor on the materials, goods or equipment delivered.
7. **PUBLIC POSTING OF COOPERATIVE CONTRACTS:** Radford University maintains a web-based contract database with a public gateway access. Any resulting cooperative contract(s) to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.
8. **RENEWAL OF CONTRACT:** This contract may be renewed by the University for four (4) successive one-year periods) under the terms and conditions of the original contract except as stated in A. and B. below. Price increases may be negotiated only at the time of renewal. Written notice of the University's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
 - A. If the University elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one-year shall not exceed the contract price(s) of the original contract increased/decreased by more than the percentage increase/decrease of the "other services" category of the Consumer Price Index for All Urban Consumers (Current Series) <CPI-U> released by the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
 - B. If during any subsequent renewal periods, the University elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more than the percentage increase/decrease of the "other services" category of the Consumer Price Index for All Urban Consumers (Current Series) released by the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
9. **SUBCONTRACTS:** No portion of the work shall be subcontracted without prior written consent of the University. In the event that the Contractor desires to subcontract some part of the work specified herein, the Contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The Contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assume compliance with all requirements of the contract.

RFP R20-008 - Attachment D - Offeror Data Sheet

Attachment D is to be completed and submitted by the Offeror as part of a complete Proposal.

*Note: The following information is required as part of your response to this solicitation. Failure to complete and provide this sheet may result in finding your offer nonresponsive.

| | |
|---|----------------|
| Qualifications: The Offeror must have the capability and capacity in all respects to satisfy fully all of the contractual requirements. | |
| Vendor's Primary Contact for this RFP: | |
| NAME: | TITLE: |
| PHONE: | EMAIL: |
| Years in Business: Indicate the length of time the Offeror's company has been in business providing the type of good or service to the type of customer detailed in this RFP: | |
| YEARS: | MONTHS: |
| References: Indicate below a listing of at least four (4) current or recent accounts (educational, commercial or governmental) that your company is servicing, has serviced, or has provided similar goods/services. Include the length of service and the name, address and telephone number of the point of contact. The Contact should be knowledgeable about the design, implementation, training, and service the Offeror's company provided to the referenced company. | |

| | |
|--------------------------------|--------------------------------|
| 1) Company: | Contact Name and Title: |
| Phone: | Email: |
| Fax: | |
| Project: | |
| Dates of Service: | \$ Value: |
| 2) Company: | |
| Contact Name and Title: | |
| Phone: | Email: |
| Fax: | |
| Project: | |
| Dates of Service: | \$ Value: |

| | |
|--------------------------|--------------------------------|
| 3) Company: | Contact Name and Title: |
| Phone: | Email: |
| Fax: | |
| Project: | |
| Dates of Service: | \$ Value: |
| 4) Company: | Contact Name and Title: |
| Phone: | Email: |
| Fax: | |
| Project: | |
| Dates of Service: | \$ Value: |

LOST ACCOUNTS: If you have lost accounts in the past (12) twelve months please indicate below providing the reasons as to why.

| | |
|--------------------------|--------------------------------|
| 5) Company: | Contact Name and Title: |
| Phone: | Email: |
| Fax: | |
| Project: | |
| Dates of Service: | \$ Value: |
| 6) Company: | Contact Name and Title: |
| Phone: | Email: |
| Fax: | |
| Project: | |
| Dates of Service: | \$ Value: |

RFP R20-008- Attachment E
COVA W-9 Request for Taxpayer Identification Number and Certification

Effective February 1, 2016 Radford University began using the Commonwealth of Virginia's new financial management system, Cardinal, with which the University is required to interface. Within Cardinal, a statewide vendor table has been created to establish a single vendor database for the Commonwealth. As a result, the Commonwealth Vendor Group (CVG) was created to keep up to date vendor records and to ensure all vendor data is managed uniformly and consistently.

All vendors must be properly established Virginia's eProcurement Portal, eVA, for the purchase of goods and services. Vendors are encouraged to become self-registered with eVA prior to doing business with Radford University. Please visit the eProcurement Portal for additional information at the following link <https://eva.virginia.gov/pages/eva-i-sell-to-virginia.htm> . A vendor will be required to submit a W9 to eVA when they register. The Commonwealth of Virginia has a [Substitute W-9 \(COVA W-9\)](#) that is required in lieu of the IRS W-9 form for each individual who is a US citizen or US resident alien and from each corporation, company, partnership, or association created or organized in the US or under the US laws. The COVA W-9 requires additional information that is needed by the CVG to ensure the vendor is properly established in Cardinal. Once a vendor is established in eVA their information will be integrated into Cardinal. *Updated by Kim McKinney, RU Accounting Services_ 2.24.2017.

Please note the COVA W-9 should be completed by the vendor and returned with their proposal as directed in the RFP.

RFP R20-008 - Attachment F - SWaM Utilization Plan

Attachment F, Table A is to be completed and submitted by the Offeror as part of a complete Proposal.

- A. Table A - Complete the SWaM Utilization Plan table below and submit with Proposal. See www.sbsd.virginia.gov for additional information on DSBSD certification.

| SWaM Vendor Name, Address, Phone | Virginia DSBSD Certification # and Expiration | Knowledgeable Contact Name, Title, Email | Goods/Services to be Provided | \$ Planned Spend and % of Total \$ |
|---|--|---|--------------------------------------|---|
| | | | | |
| | | | | |
| | | | | |

***This information will be used to determine percentage of points assigned to Evaluation Criteria if Offeror is not a DSBSD SWaM certified vendor.**

- B. Table B is not to be completed for the proposal. If a contract is awarded, the contractor shall provide the below quarterly report to Radford University’s Director of Strategic Sourcing and Supplier Diversity detailing the small business utilization actual spending. The quarterly report will be due the first week of the subsequent month for each quarter year, consisting of Jan-Mar, Apr-Jun, Jul-Sep, and Oct-Dec. The report must be submitted to the following address (email preferred):

Radford University
 Director of Strategic Sourcing and Supplier Diversity
 POB 6885
 Radford, Virginia 24142
 amah@radford.edu

Table B is on the following page for reference only – do not complete the Quarterly SWaM Subcontractor Expenditure Reporting Form as part of the proposal.

**Radford University
Quarterly SWaM Subcontractor Expenditure Reporting Form**

The subcontractor expenditure information provided on this form will be submitted in an electronic dashboard on behalf of Radford University to the Virginia Department of Small Business and Supplier Diversity (DSBSD). Provide all information requested for actual expenditures for the monthly billing period.

Reporting Period: Fiscal Year _____ Quarter Ended _____

Prime Contractor Information: Complete one form for each Prime Contractor

| | | | |
|------------------|-------|------------------------|-------|
| Company Name: | _____ | Company Contact: | _____ |
| Company Address: | _____ | Company Tax ID: | _____ |
| | _____ | RU Contract/Project ID | _____ |
| | _____ | | |

Subcontracting Expenditures: The amount paid by prime contractors to DSBSD-certified SWaM business for work directly traceable to the fulfillment of a contract or project with Radford University.

Table B:

| Subcontractor Name | Subcontractor Tax ID | Category * (MB/WB/SB) | Subcontractor Dollar Amount | DSBSD Certification Number |
|--------------------|----------------------|--------------------------|-----------------------------|----------------------------|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

* Category: (MB) Minority Business, (WB) Women-owned Business, and (SB) Small Business.
(Attach additional pages if necessary)

Summary of Expenditures by SWaM Category

| Total Subcontracting Amount with Minority Businesses (MB) | Total Subcontracting Amount with Women-owned Business (W) | Total Subcontracting Amount with Small Business (SB) |
|---|---|--|
| | | |

| | | | |
|----------------------|-------|------------------|-------|
| Submitted by: | _____ | Name: | _____ |
| Title: | _____ | Signature | _____ |
| Telephone: | _____ | Title | _____ |

RFP R20-008 - Attachment G - Financial Proposal

Attachment G is to be completed and submitted by the Offeror as part of a complete Proposal. Offerors shall identify **all** costs associated with providing the services as specified in this document.

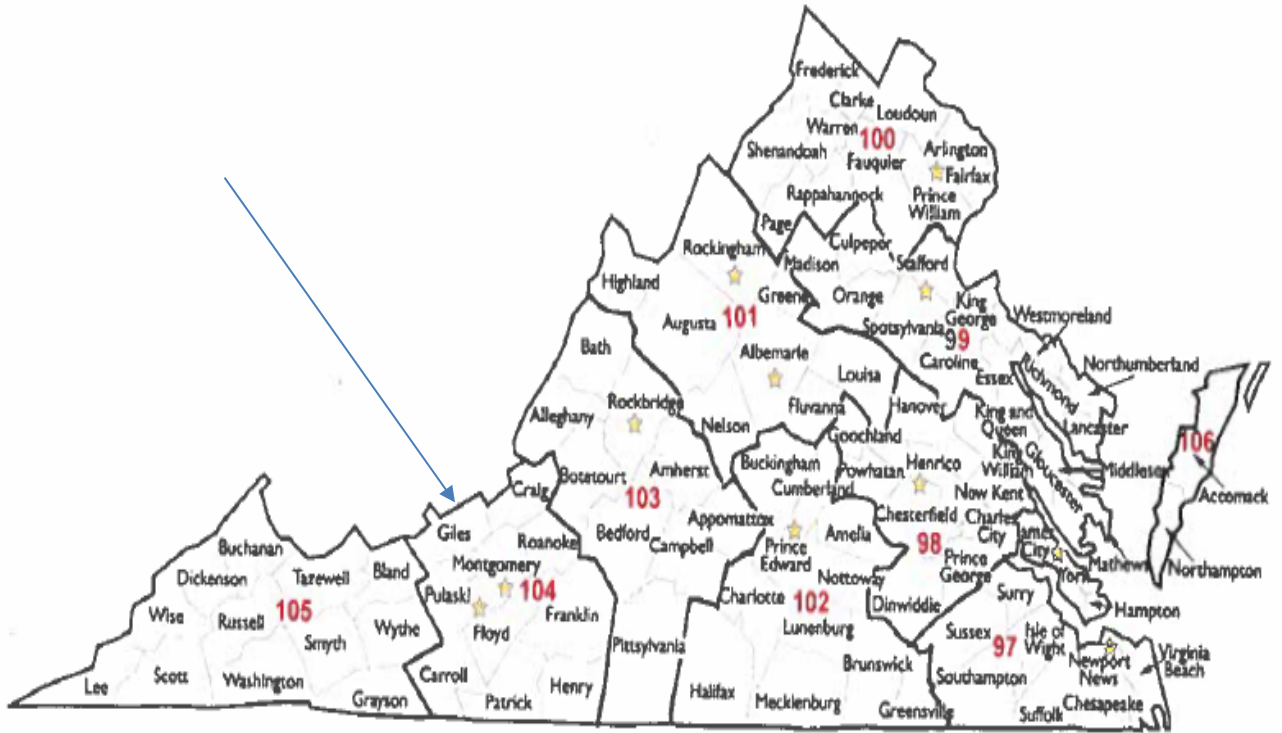
- A. Offerors should submit a fixed pricing as applicable. The hourly rates should be a schedule of hourly labor rates categorized by labor categories appropriate to perform the services requested. All labor rates shall be inclusive (fully burdened) to include all direct labor, indirect costs, travel, and profit.
- B. Offerors are encouraged to include pricing incentives and relative discounts.
- C. Indicate allowed discounts for payment terms less than n30 days.

FINANCIAL PROPOSAL:

*Note: The Financial Proposal may be applied to the Offeror's form/template and included in their proposal.

| Line Item | Description <i>Provide additional description as appropriate for clarity of offer</i> | Notes on Price Details, Factors, and Discounts | Fixed Price for each Line Item |
|------------------|---|---|---------------------------------------|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | SAMPLE ONLY | | |
| 5 | | | |
| 6 | | | |
| 7 | | | |
| 8 | | | |
| 9 | | | |

ATTACHMENT H – ZONE MAP



Virginia Association of State College & University Purchasing Professionals (VASCUPP)

List of member institutions by zones

Zone 97

Old Dominion Univ (Norfolk)
College of William & Mary (Williamsburg)

Zone 98

Virginia Commonwealth Univ (Richmond)

Zone 99

Univ Mary Washington (Fredicksburg)

Zone 100

George Mason Univ (Fairfax)

Zone 101

James Madison Univ (Harrisonburg)
University of Virginia (Charlottesville)

Zone 102

Longwood University (Farmville)

Zone 103

Virginia Military Institute (Lexington)

Zone 104

Radford University (Radford)
Virginia Tech (Blacksburg)



RFP R20-008 - Attachment I - RFP Response Checklist

The following items are required as part of your RFP submission. Ensure you have either completed the task or included the deliverable as part of your response.

___ Completed and Signed Legal Name, Address and additional information, inside cover sheet

___ Detailed RFP Response per Section VIII, Proposal Preparation and Submission

___ Acknowledge of Addendum(s) to RFP – If applicable

___ Attachment D – Offeror Data Sheet

___ Attachment E – COVA W9

___ Attachment F - SWaM Utilization Plan

___ Attachment G – Financial Proposal