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REQUEST FOR PROPOSAL

Issued By:

Responses
Delivered to:

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SECTION 1 OVERVIEW

1.1 Introduction

XXXX seeks written Proposals from qualified and experienced Firms to provide strategic planning services for the College. The selected Firm will commence work in early February, XXXX and will complete the engagement by May 31, XXXX.

1.2 Background Information

XXXX is a private liberal arts college. The College is located on XXX acres of land, and is a self-contained campus with 84 percent of students residing on campus. It enrolls the most academically qualified student body in the State of XXXX and hosts a Phi Beta Kappa Chapter. Its curriculum is rich with learning and service opportunities for its students, and more than 95 percent of its full-time faculty hold the terminal degree in their disciplines.

XXXX roots date back to XXXX, and it assumed its current name in XXXX. The most recently adopted academic curriculum strengthened what was already an emphasis on critical, independent thinking and linkages among disciplines.

The College is a selective admissions institution, with a mean ACT score of entering Fall 2011 freshmen of 26. The College had a fall 2011 enrollment of XXXX students and has full and part-time faculty and staff. The freshman to sophomore retention rate is 82 percent.

XXXX's highest annual enrollment was in Fall 2010, when enrollment was XXXX students. The College's physical facilities have been enhanced significantly in recent years, and the current physical plant is capable of handling approximately XXXX students.

The College is at a crucial crossroads, and its future success will depend on defining and implementing a strategy that increases net tuition and fees revenues and donor contributions and provides new opportunities for generating non-tuition revenue.

The College's recently adopted academic curriculum can be accessed through the College catalog through the following URL:

1.3 Method of Award

Each Proposal will be evaluated by an Evaluation Committee (defined below). Awards will be made by the College to the most responsive and responsible Firm with requisite experience and whose proposal represents the best value, as determined by the Evaluation Committee. All Firms, in submitting Proposals, concur with this method of award and will not, under any circumstances or in any manner, dispute any award made using this method.

1.4 Definitions

"Bidder" "Firm"	Entity submitting Proposal to this RFP
"College"	
"Coordinator"	Chief of Staff
"Evaluation Committee"	President, Provost, VP Enrollment Management, VP Institutional Advancement, VP for Finance; Chief of Staff; strategic planning project staff member.

“Proposal” Response to RFP
“RFP” Request for Proposal

1.5 Estimated Timetable

The following schedule will apply to this RFP:

	<u>Date:</u>
Transmittal of RFP	December 23, 20XX
Closing Date for Inquiries/Clarification Re: RFP language	January 5, 20XX
Receipt of RFPs by College	January 16, 20XX
Oral Presentations	January 17-31, 20XX
Award of Contract	February 3, 20XX

1.6 General Instructions

Bidder’s inquiries relative to the conditions and specifications listed herein as well as clarification of any information contained in this Request for Proposal must be made in writing via email to:

1.7 Requests for Clarification by the College

The College may request that any Bidder clarify or supplement any information contained in any Proposal. Bidder is required to provide a written response to such inquiries by the College within three (3) business days of receipt of request.

1.8 Submission Format/Receipt of Proposal

An original and ten (10) copies of the Proposal must be submitted to XXXX on or before 5 p.m. on January 16, 20XX

All information will be treated as confidential.

Failure to respond to all points may be grounds for rejection. Likewise, failure to supply any information required to accompany the Proposals may cause a rejection of the Proposal as non-compliant. The College reserves the right to request additional information and/or presentations.

All Proposals must be submitted in a sealed envelope and labeled as noted above. E-mail or electronic attachments are not acceptable means of submitting a Proposal and will be rejected as non-conforming. If Bidder intends to use an express delivery service, it is recommended that the Bidder stress the need to deliver the package to the building and office designated above. Packages delivered by express mail to other locations might not be re-delivered to the appropriate address in time to be considered.

Proposals that do not substantially conform to the contents of this RFP, consequently altering the basis for Proposal comparison, may be considered as non-responsive.

SECTION 2 SCOPE OF WORK

- 2.1 The College is developing a comprehensive strategic planning effort that will produce a clearly defined plan that enables the College to distinguish itself as a private liberal arts college occupying a unique niche among its peers and aspirant institutions. As a foundation, this process will require an objective review of the College's history and culture, current status including: a careful review of its mission and values, both stated and demonstrated; an analysis of its economic and demographic realities; tuition pricing; a clearer understanding of its constituencies; and knowledge of constituents' future expectations of the College.

The President has charged one individual with the internal responsibility for coordinating and facilitating, through a working group, the strategic planning process. She will work with the external Firm chosen by the Evaluation Committee during the process. The College officers will work closely with this person and the chosen Firm to ensure that the process is a top priority and to expedite the successful implementation of the planning process.

The College requires the services of a proven Firm to contribute to the intensive strategic planning effort by working with it to define a niche for BSC that provides maximum compatibility between the College's mission and size and the opportunities for success. This includes but is not limited to an analysis of its curriculum; student and faculty size; student demographics; opportunities for growth, fee structure; linkages with local business, government and the

broader community; and communication strategies. As a part of the engagement, the selected firm will:

- Conduct market research with prospective students, families and high school counselors in order to better understand the target market and how to communicate most effectively with that group
- Define the College's distinctiveness and core positioning message.
- Create models that accurately project the consequences of pricing decisions, i.e., tuition and fees and financial aid in order to provide an empirical foundation for pricing decisions; provide guidance on communicating these decisions to constituents.
- Assess the current academic curriculum and identify changes that would strengthen the College's competitive position.
- Work with the College to implement all accepted recommendations.

SECTION 3 PROPOSAL CONTENT

Each Proposal shall contain, at a minimum, the following information:

3.1 Services

- 3.1.1 Bidder will present a plan for how the objectives will be accomplished.
- 3.1.2 Bidder will provide a detailed work plan that shows the detailed elements, the sequence of work, and a projected timeline for completion.
- 3.1.3 Bidder will indicate the ongoing assistance to be provided during implementation of recommendations.

3.2 Experience

- 3.2.1 A detailed description of similar engagements performed by Bidder during the last two years in colleges or universities comparable to the College.

- 3.2.2 Names, addresses, telephone numbers and contact persons of, at a minimum, five clients who can speak to Bidder's involvement and expertise.
- 3.2.3 Resumes and other pertinent information for all personnel who would actively participate in the work should Bidder's Proposal be accepted. In particular, the College is interested in the expertise of Bidder's staff with similar clients.
- 3.2.4 Number of personnel to be assigned to the engagement and their position(s) within the Firm.
- 3.2.5 Information on the senior person(s) who will be the College's contact. Include a description of the individual's experience in providing these services.
- 3.2.6 Detail of the percentage of each individual's time that would be spent working on the College's account and how this fits into each individual's other client base.
- 3.3 Miscellaneous
 - 3.3.1 Any other information the Bidder believes will be useful to the Evaluation Committee in making its selection.
- 3.4 Fees and Payment Schedule
 - 3.4.1. A statement of fees for services, clearly identifying services that are included in the quoted fee. Bidder should also include a payment schedule.

SECTION 4 EVALUATION CRITERIA

The award of an Agreement to this RFP will be based upon a comprehensive review, analysis and negotiation of the Proposal which best meets the needs of the College. The award will be made to the most responsive Bidder offering the best services at the best value as determined by the Evaluation Committee. All Bidders submitting Proposals concur with this method of award and will not, under any circumstances or in any manner, dispute any award made using this method.

All Proposals will be evaluated by the Evaluation Committee using the evaluation criteria listed below.

4.1 Evaluation Criteria:

- A. Proposal Content:
 - 1. Clearly defined process to successfully achieve the goals and objectives identified within the content of the RFP.
 - 2. Quality of proposed plan methodology.
- B. Firm's Demonstrated Experience:
 - 1. References that demonstrate a history of experience in successfully providing identified services to educational institutions whose requirements are equivalent to the College's.
- C. Percentage of time and qualifications of personnel assigned to the engagement
- D. Pricing

SECTION 5 GENERAL TERMS AND CONDITIONS

5.1 Each Firm, by submitting a Proposal, represents that the Firm has:

- A. Read and completely understands the RFP documents and attachments thereto.
- B. Is familiar with the conditions under which services would be provided, including availability and cost of materials, equipment and personnel.

5.2 Receipt of Proposals

- A. The College will receive Proposals at the address shown on page 4 by January 16 at 5 p.m. All information will be treated as confidential.
- B. Any Proposal received after the time and date specified for receipt of Proposals shall not be considered and shall be returned unopened via regular mail.
- C. Each Bidder shall be solely responsible for the delivery of its Proposal to the College at the place and before the time as specified above.
- D. Unless otherwise noted in this document, all materials submitted in response to this RFP shall become the property of the College upon delivery and are to be

appended to any formal documentation, which would further define or expand the contractual relationship between the College and the Bidder.

- E. The College reserves the right to reject any or all Proposals submitted for consideration in whole or in part; and to waive technical defects, irregularities or omissions, if, in its judgment, the best interest of the College would be served thereby. Non-acceptance of a Proposal shall mean that another Proposal was deemed more advantageous to the College, or that all Proposals were rejected. Firms submitting Proposals that are not accepted shall be notified, upon request, after a binding contractual agreement between the College and the selected Firm exists, or after the College has rejected all Proposals.
- F. The Proposal shall bear the signature of the principal duly authorized to execute contracts on behalf of the Bidder. The name of each person signing the Proposal shall be typed or printed below the signature.

5.3 Preparation of Proposals

- A. All erasures or corrections shall be initialed by the person(s) signing the Proposal.
- B. The terms and provisions of this RFP and any contract resulting from this RFP shall be construed in accordance with the laws of the Your State. All deliveries hereunder shall comply in every respect with all applicable laws of the Federal Government and/or Your State.
- C. Any interpretation, correction, or change to this RFP shall be made by a written addendum to this contract. Interpretations, corrections or changes to the RFP made in any other manner shall not be binding and s shall not rely upon such interpretations, corrections or changes. Questions about the RFP will be submitted by email to the Coordinator:
- D. Additional Charges - All additional charges must be included in the Proposal prices.
- E. The schedule for billing and payment shall be made a part of the Proposal.

5.5 Submittal of Proposals

- A. Ten (10) copies of each Proposal shall be submitted in a sealed parcel addressed to the College at the address given above.

- B. No oral, telephonic or telegraphic Proposals will be accepted. If a Proposal is sent by mail, allowance should be made for the time required for such transmission.

5.6 Modifications or Withdrawal of Proposals Will Be Executed As Follows:

- A. A Proposal shall not be modified, withdrawn or canceled by the Bidder for a ninety (90) day period following the time and date assigned for the receipt of Proposals as specified in paragraph 1.08 above and the Bidder so agrees in submitting a Proposal.
- B. Prior to the time and date assigned for receipt, Proposals submitted early shall be modified or withdrawn only by written notice by the Bidder to the College.
- C. Withdrawn Proposals may be resubmitted up to the time designated for receipt of Proposals provided they are then fully in conformance with these terms and conditions.

5.7 Formation of Agreement

- A. The Bidder's response to this RFP will be considered an offer to contract. At its option, the College may take the following actions in order to form an agreement between the College and the selected Bidder:
 - 1. Accept a Proposal as written by issuing a written letter of acceptance to the selected Firm which refers to this RFP and accepts the Proposal as submitted; or
 - 2. Enter into negotiations with one or more Firms in an effort to reach a mutually satisfactory agreement that will be executed by both parties and will be based on this RFP, the Proposal submitted by the selected Firm, and the negotiations concerning these.
- B. Because the College **may** use the first alternative described above, each Bidder should include in its written Proposal all requirements, terms or conditions it may have, and should not assume an opportunity will exist to add such matters after the Proposal has been submitted.
- C. The College reserves the right to award a contract not based solely on the Bidder with the lowest cost, but based on an offer which, in the sole opinion of the College, best fulfills or exceeds the requirements of this RFP and is deemed to be in the best interest of the College.

D. The contract, when duly executed, shall represent the entire agreement between the parties.

5.8 Presentations

Bidders will be asked to discuss their written responses to this document in a presentation to the Evaluation Committee on date(s) mutually agreed upon between the Bidder and the College. The Bidder will make the necessary arrangements and bear any costs associated with the presentation.

5.9 Qualifications of Firm

- A. Proposals will be considered only from those Bidders with a demonstrated and substantial history of experience in successfully providing the services outlined in this RFP to similar higher education institutions.
- B. Bidder must be prepared to provide any evidence of experience, performance ability and/or financial surety the College deems necessary to fully establish the performance capabilities represented in their Proposal.
- C. The College will reject the Proposal of any Bidder and void any award resulting from this RFP to any Firm that makes any material misrepresentation in its Proposal.

5.10 Assignment

Any contract resulting from this RFP may not be assigned or transferred without the prior written consent of both parties.

FIRM: _____ **BY:** _____

ADDRESS: _____ **TITLE:** _____

_____ **DATE:** _____

PHONE #: _____ **EMAIL:** _____

FAX #: _____

F.E.I.N. #: _____