



Request for Proposal

Executive/Academic/Healthcare Search Firms
Monday, April 3, 2017



College of William and Mary
George Mason University
James Madison University
Old Dominion University
Radford University
The University of Virginia
Virginia Commonwealth University
Virginia Military Institute
Virginia Tech

A VASCUPP™ Member Institution
Issued by
Procurement and Supplier Diversity Services
Charlottesville, Virginia

A. GENERAL INFORMATION

Request for Proposal (RFP) Name: Executive/Academic/Healthcare Search Firms

RFP Number: END040317

Issue Date: Monday, April 3, 2017

Brief Description: The University of Virginia (the University) is seeking to establish multiple Agreements with a variety of Executive/Academic/Healthcare search firms.

Preproposal Questions: Any questions concerning this RFP must be sent to the buyer listed below no later than 12:00 p.m. EDT, Thursday, April 6, 2017 in order to guarantee a timely response prior to the proposal due date.

Proposal Due Date: 3:00 PM EDT, THURSDAY, April 13, 2017. Firm must submit an electronic original proposal that will be received by the University by the proposal deadline. The electronic original proposal must be submitted via electronic mail to pur-rfp@virginia.edu. All electronic proposal documents should be formatted as Microsoft Word documents.

Note: Any trade secrets or proprietary information submitted with a proposal (original or copy) for which the firm seeks protection from public disclosure must be clearly identified by the specific page and section number in the proposal and accompanied by a suitable justification requesting non-disclosure.

Expected Award Date: May 31, 2017

Term of Agreement: The term of resulting Agreements may be active through May 31, 2027. After this ending date, the University will issue another RFP.

REFER ALL QUESTIONS TO THE ISSUING OFFICE:

UNIVERSITY OF VIRGINIA
Department of Procurement and Supplier Diversity Services
1001 North Emmet St, Carruthers Hall
P.O. Box 400202
Charlottesville, VA 22904-4202
Attention: Eric Denby, Director
Phone: 434-924-4019
Fax: 434-982-2690
Email: end@virginia.edu

NOTE 1: If RFP proposal is sent U.S. Postal Service, use the P. O. Box. The University does not take responsibility for lost or misdirected mail.

NOTE 2: During the RFP process, all communication must be directed to the buyer listed above, with the exception of issues directly related to SWAM business and SWAM subcontracting opportunities. Such SWAM issues may be alternately directed to Les Houghton, Director Supplier Diversity, at (434) 924-7174 or SWAM@virginia.edu. Any failure to adhere to this requirement may result in the rejection of the firm's proposal or cancellation of the RFP.

This Request for Proposal (RFP) has been posted on Procurement and Supplier Diversity Services web site for its convenience. Addenda and attachments are posted if issued. The RFP can be downloaded at this web site: <http://www.procurement.virginia.edu/pagerfp>. It is the firm's responsibility to ensure that the latest version of the entire RFP and related links are reviewed prior to submission of a proposal. We

encourage you to check the web site frequently for any changes prior to the due date. Call (434) 924-1346 if you have trouble accessing the RFP from the web. For questions about the content of the RFP, contact the buyer listed above. Additional information can be found on Procurement and Supplier Diversity Services web site: <http://www.procurement.virginia.edu>.

For ease of reference, each firm or individual receiving this RFP is referred to as a "firm" and the firm or individual selected to provide services for the University is referred to as the "Selected Firm." This RFP states the instructions for submitting proposals and the procedure and criteria by which a firm may be selected.

B. SCOPE OF SERVICES

It is the University's intent to establish multiple Agreements with Selected Firms to assist with open Executive/Academic/Healthcare positions. By establishing multiple Agreements, University departments will have the opportunity to evaluate resulting Agreements for each qualified firm and select the one which best suits its needs.

The Selected Firms will provide Services in accordance with the following:

1. Provide assistance in the recruitment, selection and placement of qualified candidates to fill various senior level executive positions.
2. Provide documented expertise and significant value in recruiting senior-level executive management in higher education, medical center leadership, and physician specialties.
3. Provide searches with utmost sensitivity in these highly visible and closely monitored positions.
4. Ability to establish partnership and clarify expectations with University search committees and The Rector and Board of Visitors. Collaborate with the University in developing an overall search plan of action, timeline, recruitment materials and design interviews and selection process.
5. Provide assistance in preparation and submission of advertisements for higher education and healthcare publications.
6. Provide highly qualified candidates regardless of gender, ethnicity, and age.
7. Ability to ensure that during the interview process, candidates feel the University's process remains confidential and sensitive.
8. Coordinate candidate flights and any other travel arrangements.
9. Conduct Employment Searches in Compliance with the Office of Federal Contract Compliance Regulations. The Selected Firms agree to conduct all employment searches pursuant to this RFP in accordance with the Office of Federal Contract Compliance regulations. For each position for which an employment search is conducted, the Selected Firms will compile applicant demographic and disposition information ("information") for each applicant who meets the Office of Federal Contract Compliance Definition of an Internet Applicant and will maintain this information in a Microsoft Excel file ("record"). The record will include, at a minimum, Applicant Number or Name, Gender, Race and Ethnic Identification (Based on EEO reporting category definitions), Applicant Status, and Working Title of the position for each applicant. Applicants must be requested to self-identify their gender and race and ethnic identification.

The Selected Firms further agree to provide the University with an electronic copy of the record for each employment search within ten business days of the termination of the

employment search. The Selected Firms will maintain all records for any employment search resulting in a hire for a period of three years.

C. CONTENTS OF PROPOSAL

Proposals should include information requested in this section and presented in the order as outlined. Proposals will be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis will be on completeness and clarity of content, and will be organized in the order in which the requirements are presented in the RFP.

Unnecessarily elaborate brochures and other presentations beyond that sufficient to present a complete and effective proposal are not desired and may be construed as an indication of the firms' lack of cost consciousness. Elaborate artwork, expensive paper and bindings, and expensive visual and other presentation aids are neither necessary nor desired.

Firms will provide the following information:

1. Information about the firm
 - a. Please describe your firm's experience conducting searches in higher education or healthcare generally. Also please describe experience in any specialty areas where you believe your firm has unique expertise.
 - b. Provide the qualifications of senior professionals in your firm that are likely to be assigned to University searches.
 - c. Provide at least three references where similar Services to institutions of higher education or healthcare have been provided within the past three years. Include the name of the firm/organization, the year the project was implemented, the complete mailing address, and the name, telephone number and email address of the contact person.
2. Assistance during Interviewing Process.
 - a. State firm's capabilities in providing assistance during the interview process. Examples of assistance to include but not be limited to: assistance with correspondence between applicants, nominators and nominees, and coordinate interviews of internal and external prospects and the University.
 - b. Provide a University dedicated website with password protection so that resumes are available to search committees at all times.
 - c. Verify all education degrees of candidates. Provide coordination of obtaining credit/financial background check and litigation background check.
 - d. Describe how firm handles candidate reference checks.
 - e. State the firm's internal screening methodology that produces the most viable candidates (video conference/in person/telephone, etc.). Provide examples of external screening tools in providing possible past controversies with which a candidate has been associated.
 - f. Provide to the University a salary comparison of the position among peer institutions early in the process.
 - g. Develop and provide the University a timeline for each candidate from search initiation and establishment of expectations through candidate selection, negotiation, and search completion. The timeline should include milestones, activities and deliverables along the interviewing process.

- h. Provide a full list of successful recruiting conclusions and resulting positions by title and institution of higher education or healthcare.
3. Financial Proposal
- a. What is your firm's proposed fee for providing the Services? Innovation in fee proposals may set your firm apart from the competition.
- Would firm consider a fixed fee regardless of the final compensation provided to the successful candidate?
 - Another possible option among others would be to propose a sliding scale, fixed price fee schedule based on final salary package.
 - What expenses are billed to the client?
 - Will there be any mark-up on expenses?
 - Describe in detail the expenses for which it would seek reimbursement.
- b. Describe how the University will be charged. Include any additional discounts available for early payment of invoices.
- c. Describe how the University will benefit from cost savings by accepting the firm's proposal.
- d. What are the firm's payment terms? The Selected Firm may indicate payment terms of less than 30 days so long as those terms also contain a cash discount for early payment. For example: "5% 15/Net 30" would correspond to a 5% discount if paid in 15 days, otherwise net 30. The University will compute discounts from the date of completion of services, or from the date the correct invoice is received in Accounts Payable, whichever is later. The University will take the cash discount if payment is made within the specified time frame.
- Unless alternate payment terms, with cash discounts, are proposed by the Selected Firm(s), invoices submitted to the University by the Selected Firm(s) will be paid on a Net 45 days after receipt and approval of the corresponding invoice.
- e. State the firm's capability for accepting electronic payments through Automated Clearing House (ACH) and/or purchasing card and provide any additional discounts that may result from paying electronically.
- f. Please find under Section D. Terms and Conditions the University's mandatory contractual provisions that the selected firm will be required to fully accept and will be incorporated into the final contract. If selected for an assignment, the University's purchase order will suffice as the entire agreement as it will reference the contract to which the firm is assigned and all other matters will be detailed in the purchase order.
4. Additional Information
- a. Small, Woman-owned or a Minority-owned Business Enterprise
Specify whether the firm is a SWaM. Firms can only be considered a Small, Woman-owned or a Minority-owned Business Enterprise, if certified by the Commonwealth of Virginia's Department of Small Business and Supplier Diversity (SBSD) and assigned a specific identification number. No SWaM firm is required to certify under this program and no SWaM firm will be excluded from doing business with the Commonwealth because of its failure to certify as a SWaM firm. However, if the firm does qualify as a SWaM firm, we strongly suggest that registration with SBSB (<http://www.dmbc.virginia.gov/>) be completed. The Commonwealth's definitions may be found at <http://www.procurement.virginia.edu/pagediversity>
- b. If awarded an assignment, does firm agree to abide by and follow all Faculty Appointment Procedures as monitored and approved by the Office of Equal

Opportunity Programs, and to contact the Office of Equal Opportunity Programs to review these required procedures prior to beginning the search? The Faculty Appointment Procedures can be found at <http://www.virginia.edu/eop/>, click on Employment Equity at UVA.

- c. Complete and return the information requested in Attachment 2, Firm Information.

NOTE:

Virginia Freedom of Information Act

Except as provided below, once an award is announced, all proposals submitted in response to this RFP will be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act; however, the firm must invoke the protections of this section prior to or upon submission of its proposal, and must identify the specific data or other materials to be protected and state the reasons why protection is necessary. A firm may not request that its entire proposal be treated as a trade secret or proprietary information. Nor may a firm request that its pricing be treated as a trade secret or proprietary information, or otherwise be deemed confidential.

D. TERMS AND CONDITIONS

This solicitation and any subsequent award are subject to:

- The Selected Firm registering as a vendor with the University of Virginia.
<https://www.procurement.virginia.edu/pagevendorregistrationform>
- Unless otherwise deemed appropriate by the University, the Selected Firm(s) will enroll in one of the University approved methods for receipt of electronic payments. Accordingly, the Selected Firm agrees to accept Bank of America's ("BoA") ePayables® method of electronic payment or BoA's PayMode® method of electronic payment.
- The Selected Firm registering and accepting eVA Terms and Conditions prior to award.
<http://www.eva.virginia.gov/>
- The University's Mandatory Contractual Provisions:
<http://www.procurement.virginia.edu/main/publicpostings/rfp/mandatoryprovisions.pdf>
- Additional Mandatory Contractual Provisions:
Solicitation of Employees
"Search Firm" will hold the hired candidate at University of Virginia "off-limits" for three (3) years and will not approach any of the hired candidate's direct reports at the University for a period of one (1) year from the completion of the search. If the placed candidate later declares intention to leave the University, "Search Firm" will seek confirmation from the University that the individual may be recruited.

Replacement Search Terms

"Search Firm" agrees to make every possible effort to present the University with the best candidates, but cannot guarantee the performance of a candidate that is ultimately selected. "Search Firm", however, must stand by what should have reasonably been foreseen.

Should the University hire one of "Search Firm's" candidates, but that individual is later discharged within one year of hire for reasons that "Search Firm" should have identified during the search assignment, "Search Firm" will conduct a replacement search. In such event, assuming no material change to the candidate specification, "Search Firm" will apply the original fees paid toward the replacement search and charge only for out-of-pocket expenses.

- The University's Preferred Contractual Provisions:
<http://www.procurement.virginia.edu/main/publicpostings/rfp/preferredprovisions.pdf>

Note: Unless a firm *expressly and specifically states its exception* to any of the Preferred Provisions in its written proposal, then the proposal from the firm will automatically be deemed to include those Provisions.

- The University's Procedure for Resolution of Contractual Claims
<http://www.procurement.virginia.edu/main/publicpostings/rfp/resolution.pdf>

E. OTHER INFORMATION

1. Anticipated Award Schedule/ Open Enrollment

It is the intent of this RFP to have multiple open award enrollment periods, over the course of a 10-year span. The University reserves the right to award to new Selected Firm(s) and/or re-negotiate pricing with currently Selected Firm(s) during these open enrollment periods.

Annual periods of open enrollment will be initiated the first quarter of the calendar year, January 1st through March 31st of each year for the ten (10) year term until the year 2027. These periods of open enrollment will be referred to as specific "Generation(s)" of vendor award(s). Selected Firm(s) may be awarded for one, more than one, or all Services Categories. Firm(s) will be asked to provide proposals in a similar process as described in Section C. for Proposal Submission, during each Generation open enrollment period.

Selected Firm(s) who have been awarded in the prior year will be subject to auto-renewals for the full ten (10) year period unless otherwise determined by the University. Selected Firm(s) pricing and discounts will remain for a period of one year from date of Agreement. The University may negotiate or re-negotiate pricing or service terms during the open enrollment period of each year. Selected Firm(s) awarded in subsequent Generation(s) will have the same expiration term and pricing requirements as identified in this RFP.

2. Insurance

Listed below is the insurance the Selected Firm must maintain under any Agreement resulting from this RFP. In no event should the Selected Firm construe these minimum required limits to be its limit of liability to the University. The Selected Firm will maintain insurance which meets or exceeds the requirements of the University with insurance companies that hold at least an A-financial rating with A.M. Best Company. No Agreement will be executed by the University until the Selected Firm satisfies the insurance requirements of the University. The Selected Firm may be required to provide the University with a valid Certificate of Insurance before providing any

goods or services to the University. The University reserves the right to approve any insurance proposed by the Selected Firm.

Comprehensive Commercial General Liability:

The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of \$1,000,000 per occurrence with coverage for the following coverage:

- {X} Premises/Operations {X} Contractual
- {X} Personal Injury

Automobile Insurance:

The Selected Firm and any Subcontractor will provide a minimum combined single Limit of Liability for bodily injury and property damage of \$500,000 per accident with the following coverages for vehicles operated by its employees or agents.

- {X} Any Automobile

Errors & Omissions:

The Selected Firm and any Subcontractor will maintain Errors and Omissions liability insurance with a limit of at least \$1,000,000 per claim, providing liability coverage for the services outlined in this RFP.

Workers Compensation:

The Selected Firm and any Subcontractor will maintain Workers' Compensation insurance in accordance with the Virginia Workers' Compensation Act, and also maintain Employers Liability insurance with limits of not less than \$100,000.

*Additional Insured:

The University will be named as an Additional Insured, and the proper name is: "The Commonwealth of Virginia, and the Rector and Visitors of the University of Virginia, its officers, employees, and agents."

3. Formation of the Agreement with the Selected Firm

All proposals received will first be carefully evaluated by the University, and then the University intends to conduct negotiations with two or more firms. After negotiations have been conducted, if the University chooses to make award, the University will select the firms which, in its opinion, best meets the needs of the University.

Any firm(s) invited to negotiations should note that the University reserves the right to begin negotiations by combining the best aspects of submitted proposals from all responding firms as the basis for subsequent formation of any Agreement resulting from this RFP.

Firms should also note that, as described above, certain matters will automatically be deemed part of the proposal.

Attachment 1

Vice President for Finance's Request for Commitment

Greetings:

The University of Virginia is able to deliver excellent education, research, healthcare, and public service because the high value support from you and all our suppliers of goods and services. Thank you for sharing our commitment to excellence. As a University, we are committed to diversity within our students, our faculty and staff, and our vendors and contractors. An important part of our procurement program involves our commitment to doing business with small, women- and minority-owned (SWaM) businesses. We look to you to help us achieve this objective.

We currently have a substantial volume of activity with small firms; however, we are striving to increase the number of substantial, long-term business relationships with minority- and women-owned businesses. We need your help here.

I have two requests. First, I ask that you actively seek out opportunities to involve small, women- and minority-owned businesses as you deliver services to UVa. Our team in Procurement and Supplier Diversity Services will assist you in identifying qualified diverse business partners. Second, please report your success in this area through our quarterly subcontracting reports – this is critical in quantifying how well we are meeting our goals. The terms and conditions previously provided to your organization outlined this process.

This effort is important to the University. We truly appreciate your efforts to join us in this commitment and partnership towards excellence.

Sincerely,



Melody S. Bianchetto
Vice President for Finance

O'Neil Hall
Post Office Box 400210
Charlottesville, Virginia 22904-4210
434-982-2347 · Fax: 434-297-6444
msb2p@eservices.virginia.edu * www.virginia.edu/avpfinance

Attachment 2
Firm Information

Full Legal Name (*Company name as it appears with its Federal Taxpayer Number*):

Address:

Telephone Number:

FAX Number:

Web Address:

Email Address:

DUNS Number:

SWAM Information:

Is the firm certified with the Commonwealth of Virginia's Department of Small Business and Supplier Diversity (SBSD): Yes No

Minority-Owned Business: Yes No

Women-Owned Business: Yes No

Small-Owned Business: Yes No

Is the firm registered as a vendor in the Commonwealth of Virginia's e-procurement system (eVA)?
 Yes No

Point of Contact for this Proposal:

Name:

Address:

Office No.

Mobile No.

FAX No.

Email Address: