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|-----------------------------|---|---|------------------------------------|
| Request<br>for<br>Proposals |  | <b>Marshall University</b><br><b>Office of Purchasing</b><br><b>One John Marshall Drive</b><br><b>Huntington, WV 25755-4100</b><br>Direct all inquiries regarding this order to: (304) 696-2599 | <b>Proposal#</b><br><br>MU18SEARCH |
|-----------------------------|---|---|------------------------------------|

|   |   |
|---|---|
| <b>Vendor:</b><br><br><b>Phone:</b><br><br><b>Email:</b><br><br><b>FEIN/SSN:</b><br><br><b>Fax:</b> | <b>For information contact:</b><br><br><b>Buyer:</b> Stephanie Smith<br><b>Phone:</b> (304) 696-2599<br><b>Email:</b> purchasing@marshall.edu |
|---|---|

Sealed requests for proposals furnishing services described below will be received by the Institution. TO RECEIVE CONSIDERATION FOR AWARD, UNLESS OTHERWISE NOTED, THE PROPOSAL WILL BE SUBMITTED INTO THE BONFIRE PORTAL ON OR BEFORE THE DATE AND TIME SHOWN FOR THE PROPOSAL OPENING AND (1) ONE COURTESY COPY MAILED TO THE OFFICE OF PURCHASING AT THE ADDRESS PROVIDED HEREIN. The Institution reserves the right to accept or reject proposals separately or as a whole, to reject any or all proposals, to waive informalities or irregularities and to contract as the best interests of the ON THE REVERSE SIDE HEREOF AND AS SET FORTH HEREIN.

| DATE     | DELIVERY REQUIREMENTS | DEPARTMENT REQUISITION NO.   | PROPOSALS OPEN:                | BIDDER MUST ENTER DELIVERY DATE FOR EACH ITEM BID |                |
|----------|-----------------------|--|--------------------------------|---|----------------|
| 10/16/17 |                       |  | 3:00 PM on<br>November 6, 2017 |   |                |
| Item #   | Quantity              | Description  |                                | Unit Price  | Extended Price |
|          |                       | Marshall University will accept proposals for the following services until 3:00 p.m. on 11/06/17. At that time, proposals will be recorded in Room 125, Old Main Building, located on the Campus of Marshall University.<br><br>MARSHALL UNIVERSITY<br>SEARCH CONSULTING SERVICES<br><br>The cost proposal must be enclosed in a separately sealed envelope to be opened at a later proposed date and time.<br><br><u>Final questions will be received on or before October 25, 2017</u><br><u>Submit written questions to <a href="mailto:smiths@marshall.edu">smiths@marshall.edu</a> with the subject line RFP MU18SEARCH Questions</u> |                                |   |                |

**Total**

To the Purchasing Department,  
 In compliance with the above, the undersigned offers and agrees, if this offer is accepted within \_\_\_\_\_ calendar days (30 calendar days unless a different period is inserted by the purchaser) from the bid open date, specified above, to furnish any or all items upon which prices are offered, at the price set opposite each item, delivered at the designated point(s), within the time specified.

Bidder guarantees shipment from \_\_\_\_\_  
 \_\_\_\_\_ within \_\_\_\_\_ days  
 FOB \_\_\_\_\_ After receipt of order at address shown  
 Terms \_\_\_\_\_

BOG 43

Bidder's name Vendor \_\_\_\_\_  
 Signed By \_\_\_\_\_  
 Typed Name \_\_\_\_\_  
 Title \_\_\_\_\_  
 Street Address \_\_\_\_\_  
 City/State/Zip \_\_\_\_\_  
 Date \_\_\_\_\_ Phone \_\_\_\_\_  
 Fein \_\_\_\_\_

I. PURPOSE:

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from experienced search consulting firms to establish a contract or contracts through competitive negotiations for executive search consulting services for Marshall University. Firms with expertise and current experience with executive search consulting services, as outlined in the RFP, are invited to submit proposals.

II. BACKGROUND:

Marshall University was founded as an academy in 1837 in Huntington, West Virginia located in the southwestern border of the state. Marshall University officially became a public university in 1961. The University has experienced major growth in the last few decades.

Approximately 14,000 students attend Marshall University, including about 370 international students representing more than 60 countries.

Twelve colleges and schools, which offer over one hundred undergraduate, graduate and doctoral programs, are part of the University. Over 70 undergraduate programs/majors are offered in various fields.

More than 50 graduate, doctoral and medical degree programs are offered, including Teaching of English to Speakers of Other Languages (TESOL), biomedical/biological science, health care administration, human resource management, information systems, Master of Business Administration (MBA), and technology management.

The campus is within walking distance of shopping, restaurants, movie theaters, hotels and banks. On campus, students have access to contemporary instructional facilities, a recreation center, student health services, dining and residential facilities, a state-of-the-art library with a 24-hour study center, tutoring services, numerous social and academic student organizations and a host of artistic, cultural athletic events.

Quick Facts: <http://www.marshall.edu/home/quick-facts>

Institutional Data: <http://www.marshall.edu/irp/institutional-data/>

Institutional Priorities: [https://www.marshall.edu/2020/files/Affirmation-of-Institutional-Priorities\\_April-29-2015.pdf](https://www.marshall.edu/2020/files/Affirmation-of-Institutional-Priorities_April-29-2015.pdf)

III. CONTRACT PERIOD:

The term of this contract is for two years, or as negotiated. There will be an option for four (4) two-year renewals, or as negotiated.

IV. STATEMENT OF NEEDS:

The University, recognizing the need to attract and retain highly experienced personnel, seeks to enhance its existing recruitment procedures by securing the services and resources of an executive search firm or firms when filling particular vacancies within the University. The firm or firms selected must have demonstrable qualifications and experience in the placement of individuals to positions within a higher education, not-for-profit institution. **The FIRST initial search is for the Office of the Provost.**

V. SCHEDULE

The RFP proposal timeline is represented in the following schedule:

|                          |   |
|--------------------------|---|
| October 25 <sup>th</sup> | Final Questions from Firms                          |
| October 30 <sup>th</sup> | University's Response to Questions                  |
| November 6 <sup>th</sup> | Proposals received by University                    |
| TBD                      | Technical responses reviewed                        |
| TBD                      | Shortlist Firms invited for Oral Presentations      |
| TBD                      | Final Technical Scores completed                    |
| TBD                      | Financial Proposals opened                          |
| TBD                      | Notification of firm(s) selected for contract award |
| TBD                      | Begin FIRST search process                          |

VI. PROPOSAL PREPARATION AND SUBMISSION:

1. General Requirements:

*i. RFP Response:*

In order to be considered for selection, Offerors must submit a complete response to this RFP. **One submittal into the Bonfire portal and four (4) copies** submitted to: Marshall University Office of Purchasing Department One John Marshall Drive, Huntington, WV 25755-4100. List the RFP Number on the envelope(s) or package(s).

*ii. Proposal Preparation:*

Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in 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 at its discretion. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

Proposals should be prepared simply and economically providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

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. The proposal should contain a table of contents. Information that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

Each digital copy of the proposal should be segmented where practical. All copies submitted should be bound in a single volume.

Ownership of all data, material and documentation originated and prepared for the University shall belong exclusively to Marshall University and be subject to public inspection in accordance with the West Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the West Virginia Freedom of Information Act. However, to prevent disclosure the Offeror must invoke the protections of Section §29B-1-4. Exemptions of the Code of West Virginia, in writing, either before or at the time the data or other materials are submitted. The written request must specifically identify the data or other materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and may result in rejection of the proposal.

*iii. Oral Presentation:*

Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to the University. This will provide an opportunity for the Offeror to clarify or elaborate on the proposal but will in no way change the original proposal. A time and location will be scheduled for these presentations, if necessary. Oral presentations are an option of the University and may not be conducted. Therefore, proposals should be complete.

*iv. Specific Requirements:*

Proposals should be as thorough and detailed as possible so that the University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following information/items as a complete proposal:

1. The return of the General Information Form and addenda, if any, signed and filled out as required.
2. Execution of Services: Provide details for the items in this section that are applicable to your firm's expertise:
  - a. Describe how the firm plans to provide consulting and advisory services related to the recruitment of the University Provost, in particular, other executive and senior management, including positions within the academic and administrative areas of the university.
  - b. Describe how the firm plans to provide consulting and advisory services related to the recruitment
    - i. Provost
    - ii. University executive and senior management
    - iii. University senior scientific and technical administrative directors
    - iv. Information technology professionals
    - v. Development and fundraising officers for the university
  - c. Describe and/or specify any other areas of expertise the firm has in consulting and advising services.
  - d. Advise of the restrictions and limitations, if any, to the University hiring unsuccessful candidates for other university positions.

*v. Firm Information, experience, personnel and references:*

1. Provide a brief history of the firm and its experience in providing executive search services similar to those described in this RFP.
2. Provide information on the individuals that will be assigned to provide service to the University. Include a description of their experience in providing similar consulting and advisory services related to executive searches.
3. Provide examples of the firm's recent success in identifying competitive woman and minority candidates.
4. Describe the firm's past working relationships with search committees.
5. Provide four (4) references, either educational or governmental, for which the firm has provided services similar to those described herein. Include the dates the services were furnished, the client name, address and the name, phone number and email address of the individual that Marshall University has your permission to contact.
6. Provide a list of any clients lost within the last three years which includes a contact name and phone number, length of service of the account, and the reason for the loss. A loss would include clients that ceased doing business with the firm because an adequate candidate pool was not supplied, or clients that formally

terminated contractual obligations to the firm prior to or directly following completion of a search due to dissatisfaction.

7. Provide a description of any comparable services performed by the contractor during the most recent five-year period similar in scope to Marshall University. In particular, the contractor should highlight any experience with placements at institutions like Marshall University, to include a School of Medicine, Research Corporations, and Distance Learning institutions
8. Provide a copy of the firm's most recent audited financial statements.

*vi. Other Information:*

Provide any additional information that should be considered in evaluating the firm's proposal.

*vii. Financial Proposal (under separate file to be opened after the technical review process – Do not disclose cost in the technical files, upload as a separate file and separate sealed envelope):*

Describe the fees that will be charged for the Services. Please include the firm's best price for the searches, if applicable, include:

- a. Percent of total first year's cash compensation for professional fee, Professional fee or administrative fee, if any, and (3) maximum dollars to be paid if the firm has a cap on the total fee, if any.
- b. Advise if the firm is willing to accept 1 /3 of the fee at start-up, 1/3 after initial pass of candidates are presented to the university and 1/3 after the finalist is selected. If not, what is the firm's best offer?
- c. If employment for a hired candidate should be terminated within one year from the start date of the hired candidate, will your firm guarantee to conduct a new search for no further professional fee? Include restrictions to this guarantee, if any.
- d. Describe the fee structure for lower level positions if different than executive and senior management positions.
- e. Advise if firm is willing to agree to an optional two-tier contract that might consist of the firm developing and supplying a candidate pool to the university without managing or being involved in the remainder of the search process. If firm has a pricing structure for different services please provide.
- f. Describe how the University will benefit from any cost savings by accepting the firm's proposal.

VII. SELECTION CRITERIA AND AWARD

1. Selection Criteria:

Proposals will be evaluated by Marshall University using the following:

Maximum Point Criteria Value

|   |     |
|---|-----|
| Firm information, references and experience | 30  |
| Execution of services                       | 40  |
| Financial proposal                          | 30  |
| Total:                                      | 100 |

2. Award:

Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but may not be the sole determining factor. After negotiations have been conducted with offerors, Marshall University shall select the offeror or offerors, which, in its opinion, has made the best proposal(s), and shall award the contract(s) to that offeror or offerors.

Marshall University may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reason why a particular proposal was not deemed to be the most advantageous. Should the University 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 this solicitation and the Contractor's proposal as negotiated.

VIII. ATTACHMENTS:

1. Attachment A: RFP Supplementary Terms and Conditions
2. Attachment B: Standard Contract Forms



# Submission Instructions for Suppliers

Please follow these instructions to submit via our Public Portal.

## 1. Prepare your submission materials:

### Requested Information

| Name     | Type                  | # Files  | Requirement |
|----------|-----------------------|----------|-------------|
| Proposal | File Type: PDF (.pdf) | Multiple | Required    |
| Cost     | File Type: PDF (.pdf) | Multiple | Required    |

### Requested Documents:

Please note the type and number of files allowed. The maximum upload file size is 100 MB.

Please do not embed any documents within your uploaded files, as they will not be accessible or evaluated.

## 2. Upload your submission at:

<https://marshall.bonfirehub.com/opportunities/5385>

Your submission must be uploaded, submitted, and finalized prior to the Closing Time of **Nov 06, 2017 3:00 PM EST**. We strongly recommend that you give yourself sufficient time and **at least ONE (1) day** before Closing Time to begin the uploading process and to finalize your submission.

### Important Notes:

Each item of Requested Information will only be visible after the Closing Time.

Uploading large documents may take significant time, depending on the size of the file(s) and your Internet connection speed.

You will receive an email confirmation receipt with a unique confirmation number once you finalize your submission.

Minimum system requirements: Internet Explorer 11, Microsoft Edge, Google Chrome, or Mozilla Firefox. Javascript must be enabled. Browser cookies must be enabled.

### Need Help?

Marshall University uses a Bonfire portal for accepting and evaluating proposals digitally. Please contact Bonfire at [Support@GoBonfire.com](mailto:Support@GoBonfire.com) for technical questions related to your submission. You can also visit their help forum at <https://bonfirehub.zendesk.com/hc>