Request for Proposal

UVa Economic Impact Study

March 23, 2016

A VASCUPP Member Institution
Issued by
Procurement and Supplier Diversity Services
Charlottesville, Virginia
A. GENERAL INFORMATION

Request for Proposal (RFP) Name: UVa Economic Impact Study

RFP Number: #END032316

Issue Date: March 23, 2016

Brief Description: The University of Virginia (UVa) is seeking proposals for consulting services to provide an economic impact study measuring the University’s economic impact on the Commonwealth of Virginia.

Preproposal Questions: There will not be a preproposal conference for this RFP. Any questions concerning this RFP must be sent to the buyer listed below no later than 3:00 PM, Wednesday, March 30th in order to guarantee a timely response prior to the proposal due date.

Proposal Due Date: 3:00 PM EDT, Wednesday, April 6, 2016. Firms must submit an electronic original proposal that will be received by the University by the proposal deadline. The electronic, original proposal must be submitted on a thumb drive or CD-ROM (or alternately submitted via electronic mail to pur-rfp@virginia.edu.) In addition to the original proposal, firms must provide six (6) hard copies of the original proposal in individual, bound volumes. Each hard copy of the proposal must be accompanied by an electronic copy of the proposal on a thumb drive or CD-ROM. All electronic proposal documents, whether originals or copies, should be formatted as Microsoft Word documents.

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.

Negotiations: Negotiations, if needed, will be held during the week of April 11th.

Expected Award Date: Immediately after negotiations.

Term of Agreement: The term of a resulting Agreement or Purchase Order will be for five years, with the ability to renew on the same or similar terms and conditions, for two additional one-year periods if mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 180 days prior to each renewal period whether to renew the terms of the Agreement.

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: ToShun Campbell
Phone: 434-924-1346
Fax: 434-982-2690
Email: pur-rfp@virginia.edu

NOTE 1: If RFP proposal is sent via U.S. Postal Service, use the P. O. Box address. 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 Haughton, 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 the Procurement and Supplier Diversity Services website for your convenience. Addenda and attachments are posted if issued. The RFP can be downloaded at this website: [http://www.procurement.virginia.edu/pagerfp](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 the Procurement and Supplier Diversity Services website: [http://www.procurement.virginia.edu](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 GOODS & SERVICES

**Project Scope:** The study will include data from the following University agencies: 1. The Academic Division, Agency 207; 2. Health System, Agency 209; and 3. College at Wise, Agency 246. Data will be parsed by each of the three agencies and by each of the two regions: Region 1 is the Thomas Jefferson Planning District Commission (TJPDC) and Region 2 is the combined planning districts of LENOWISCO and Cumberland Plateau.¹

The study shall include, but not be limited, to the following:

**Component 1: Basic Data**

a. Impact on regional and state economic activity, e.g., employment, output, Gross Domestic Product (GDP), including:
   i. Direct spending for capital improvements
   ii. Direct spending on procurement, i.e., maintenance, goods, services, and supplies;
   iii. Direct spending on faculty, staff, and contract employees;
   iv. Direct spending by students;
   v. Direct spending by out-of-town and out-of-state visitors and patients;
   vi. Indirect spending that has an impact on the Commonwealth;

b. Economic activity generated by industry (trade, health services, leisure/hospitality, financial, etc.), both direct and indirect;

c. Impact of University on state and local government tax revenues;

d. Economic impact and economic value of basic and applied University Research and Development activities including clinical, diagnostic and testing services;

**Component 2: Research and Entrepreneurship:**

a. Examination and tracking of the number of companies for which the University has assisted in their creation development and growth, and how those companies have affected Virginia’s economy, e.g., job creation, members of research consortia (e.g., Engineering Research Centers (ERCs), Industry University Collaborative Research Centers (IUCRCs)), sponsored research

¹ TJPDC includes: City of Charlottesville, Albemarle County, Fluvanna County, Greene County, Louisa County, and Nelson County. LENOWISCO PD includes: City of Norton, Lee County, Scott County, and Wise County. Cumberland Plateau PD includes the counties of: Buchanan, Dickenson, Russell, and Tazewell.
activities, facility use agreements, patent and licensing activity, joint Small Business Innovation Research (SBIR)/Small Business Technology Transfer (STTR) applications and awards, proof of concept funds, angel investment, venture capital\(^2\), UVa I.Lab and other entrepreneurship programs, research park partners, etc.;
b. Examination of University programs for entrepreneurship (courses, programs, majors, concentrations, competitions) and effect on business startup activity;
c. Identification of ways in which the University supports the regional innovation ecosystem and impacts business startup activity through programs (courses, majors, concentrations, competitions), networking and sponsorships, e.g., Virginia Film Festival, Tom Tom Festival, and startup career fair;

**Component 3: Service and Engagement**

a. Examination and tracking of student engagement activities and their effects on businesses and community development, e.g., student internships, service-learning enrollment, number and types of community partnerships;
b. Measurement of civic engagement contributions including annual charitable donations, volunteerism, and community leadership;

**Component 4: Other**

a. Measurement of public and business use of University facilities, e.g., libraries, athletic facilities, museums, galleries, conferences;
b. Impact of University alumni living in the region and Commonwealth, e.g., earnings, entrepreneurial activities.

**Geographic Footprint of Impact:** The geographic region of impact will be statewide, with the ability to parse impact data at the regional level, specifically: 1. in the Thomas Jefferson Planning District Commission (TJPDC) and 2. in the combined LENOWISCO and Cumberland Plateau Planning Districts\(^3\).

C. **BASIS OF SELECTION**

Proposals will be evaluated based upon the overall merits/value of the proposal including, but not limited to, price. The University will evaluate proposals, and if a firm is to be selected, select the firm on the basis of:

1. The firm's plan to provide the University with the products as described in the Scope of Good and Services section;
2. The firm’s experience in providing Goods and Services similar to those described in this RFP, to include the firm’s references from clients;
3. The firm’s price proposal; and

\(^2\) Article on Charlottesville as the fastest growing venture capital ecosystem in the U.S. and UVa-related startups: [https://news.virginia.edu/content/charlottesville-new-capital-venture-capital](https://news.virginia.edu/content/charlottesville-new-capital-venture-capital)

\(^3\) TJPDC includes: City of Charlottesville, Albemarle County, Fluvanna County, Greene County, Louisa County, and Nelson County. LENOWISCO PD includes: City of Norton, Lee County, Scott County, and Wise County. Cumberland Plateau PD includes the counties of: Buchanan, Dickenson, Russell, and Tazewell.
The firm’s Small, Woman-owned and Minority-owned (SWAM) business status and/or the firm’s plan for utilization of SWAM businesses. For more information about SWAM and the University’s SWAM plan, please see the letter in Attachment 1 and refer to the following site: www.procurement.virginia.edu/main/publicpostings/rfp/SWAMplan.pdf

D. CONTENTS OF PROPOSAL

Proposals should 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.

Required Information About the Firm:

1. A detailed description and the full specifications of the services proposed. Each firm will indicate in its proposal the firm’s ability to achieve/comply with each specification. In the event that the firm wishes to propose an alternate specification that, in any way, differs from the above specifications, the firm will detail the proposed change(s) and how the proposed change would compare to the listed specification. Proposals will be formatted in such a way to address each of the above specifications in a line-by-line process.
2. A brief history of the firm and its experience, qualifications and success in providing the type of product requested.
3. Information on the warranty associated with the product the firm is proposing and any extended warranty (include the price) that might be available.
4. The firm’s proposed price / fee for providing the Impact Study.
5. At least three references where similar services have been provided. Include the name of the firm / organization, the complete mailing address, and the name of the contact person and telephone number.
6. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or how the firm intends to utilize SWAM firms in regards to this particular procurement.
7. Provide a list of institutions of higher education with which the firm has signed a term contract.
8. Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of the VASCUPP Members can be found at https://vascupp.org
9. Complete and return the information requested in Attachment 2, Firm Information.

Required Information on The Proposal:

1. Cover letter describing firm, signed by a representative authorized to legally bind firm in a contract;

4 A 10% minimum weight will be given to SWAM criterion in evaluating proposals.

5 Any questions related to SWAM business and SWAM subcontracting opportunities can be directed to Les Haughton, Director Supplier Diversity, at (434) 924-7174 or lh7sn@virginia.edu.
2. Firm qualifications and experience, along with examples of and references for previous work
3. Project organization, including how you will organize your team to complete the project, key
team individuals and their qualifications including resumes of the principal in charge, project
manager, and other key personnel;
4. Methodology and work plan, including modeling approach, status reporting procedures, and
communication with the University during the course of the project;
5. Deliverables, describing format, content, and delivery methods;
6. Schedule, identifying all tasks, sub-tasks, and key milestones;
7. Detailed budget that reflects all costs for completing the project, with separate costs for each of
the four components listed in the Project Scope: 1. Basic Data; 2. Research and
Entrepreneurship; 3. Service and Engagement; and 4. Other. The University expects to
negotiate a fixed-price contract for the project but alternate compensation models may be
considered.

Project Deliverables:
• Preliminary Draft Economic Impact Study to be delivered no later than September 15, 2016 for
University review and comment.
• Final Economic Impact Study to be delivered no later than November 1, 2016.

Previous Studies (all data will be made available):
• Study of the Economic Impact of Virginia Public Higher Education , Knapp, Rephann, Shobe,
Dec 2009
• Study of the Economic Impact of Virginia Public Higher Education: 2013 Update. Rephann, July
2013
• Economic Impacts of the University of Virginia Cancer Center and Expanded State Support,
Rephann, March 2011
• The Economic Impact of the University of Virginia, Knapp, Shobe, 2005 data/2007 report
• The Economic Impact of Entrepreneurial Alumni: A Case Study of the University of Virginia.,
Lenox, King, Eesley, and Mehedi. http://web3.darden.virginia.edu/uva-
alumni/download/U.Va.%20Entrepreneurial%20Alumni.pdf
https://news.virginia.edu/content/survey-innovative-uva-ventures-create-economic-growth

NOTE: Virginia Freedom of Information Act
Except as provided, once an award is announced, all proposals submitted in response to this RFP will be
open to inspection by any citizen, or interested person, firm or corporation, in accordance with the
Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm prior
to or as part of its proposal will not be subject to public disclosure under the Virginia Freedom of
Information Act only under the following circumstances: (1) the appropriate information is clearly
identified by some distinct method such as highlighting or underlining; (2) only the specific words,
figures, or paragraphs that constitute trade secrets or proprietary information are identified; and (3) a
summary page is supplied immediately following the proposal title page that includes (a) the information
to be protected, (b) the section(s)/page number(s) where this information is found in the proposal, and (c)
a statement why protection is necessary for each section listed. The firm must also provide a separate
electronic copy of the proposal (CD, etc.) with the trade secrets and/or proprietary information redacted. If
all of these requirements are not met, then the firm’s entire proposal will be available for public
inspection.
IMPORTANT: 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/fees be treated as a trade secret or proprietary information, or otherwise be deemed confidential.

E. TERMS AND CONDITIONS

This solicitation and any subsequent award is subject to:

- The Selected Firm registering as a vendor with the University of Virginia. [https://www.procurement.virginia.edu/pagevendorregistrationform](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.

**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.


F. OTHER INFORMATION

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.

**Commercial General Liability:** The Selected Firm and any Subcontractor will maintain a minimum combined single Limit of Liability for bodily injury and property damage of $500,000 per occurrence, with coverage for premises and operations.
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 on all owned, hired, and non-owned vehicles operated by their employees.

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 firm which, in its opinion, best meets the needs of the University. Alternately, if the University determines in writing and in its sole discretion that only one firm is fully qualified, or that one firm is clearly more highly qualified than the others under consideration, it may decide to negotiate and award an agreement to that single firm. In either event, the University intends to execute a mutually satisfactory written agreement which will reflect and largely incorporate this RFP as reconciled with any pertinent documents, such as the proposal submitted and relevant negotiation correspondence.

Because the University may choose to negotiate and award to a single firm as discussed above, each firm must include in its written proposal all requirements, terms or conditions it may have, and should not assume that an opportunity will exist to add such matters after the proposal is submitted.

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.
Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women- and minority-owned (SWaM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have a particular institutional focus on developing long-term business relationships with minority- and women-owned businesses. We count on our majority firms to help us achieve our goal.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVA. The office of Procurement and Supplier Diversity Services is ready to assist you in identifying qualified diverse business partners. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,

Colette Sheehy
Vice President for Management and Budget
**Full Legal Name** *(Company name as it appears with its Federal Taxpayer Number):*

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**SWAM Information:**

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<th>Is the firm certified with the Commonwealth of Virginia’s Department of Small Business &amp; Supplier Diversity (SBSD):</th>
<th>□ Yes □ No</th>
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<td>Minority-Owned Business:</td>
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<td>Women-Owned Business:</td>
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<td>Small-Owned Business:</td>
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<th>Is the firm registered as a vendor in the Commonwealth of Virginia’s e-procurement system (eVA)?</th>
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**Point of Contact for this Proposal:**

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