University of Mary Washington
Procurement Services

**Standard Contract**

**UCPUMW 25-1828**
**Campus Store Operations**

This contract, between Ambassador Education Solutions, hereinafter called the "Contractor", and the Commonwealth of Virginia, University of Mary Washington, called the "University" or "UMW", shall become effective upon execution by both parties.

**WITNESSETH** that the Contractor and the University, in consideration of the mutual covenants, promises and agreements contained herein, agree as follows:

**PERIOD OF CONTRACT:** Date of execution by both parties through June 30, 2031 with five (5), one-year renewal options.

**CONTRACT DOCUMENTS:** The contract shall consist of the following documents *in order of precedence*, all of which are incorporated herein by reference, and constitute the "contract documents":

1. This signed Contract;
2. The University of Mary Washington's Request for Proposal RFP 25-1828, dated February 7, 2025 (Exhibit A); Addendum No. 01, dated February 28, 2025 (Exhibit B); and Addendum No. 02, dated March 6, 2025 (Exhibit C);
3. VHEPC PAC Agreement (Exhibit D);
4. The Contractor's proposal dated March 10, 2025 (Exhibit E);

**Definitions**

**"Course Materials Services"** means the sourcing, adoption management, distribution, delivery, billing, and support of required and recommended academic materials in digital or physical formats.

**"Platform"** means Contractor's technology system used to manage course materials, including integrations with University systems.

**"Physical Store Operations"** means on-campus retail bookstore operations, which may be performed by Contractor or an approved third-party partner.

**"Third-Party Retail Operator"** means a subcontracted entity engaged by Contractor to operate physical retail services.

**"COURSE MATERIALS PLATFORM AND DIGITAL DELIVERY"**
Contractor shall provide a best-in-class course materials platform that:
- Integrates with University systems (SIS, LMS, etc.)
- Enables equitable and timely student access to required materials
- Supports digital-first delivery models, including inclusive access and day-one programs
- Provides reporting, analytics, and adoption transparency

The primary method of delivery shall be through Contractor's online storefront and platform. Physical retail services, if provided, shall support but not define the primary service model.

**CONTRACT CLAIMS:** Any contractual claims shall be submitted in accordance with the contractual dispute procedures set forth in the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors.

**SCOPE OF SERVICES:** If authorized by the Contractor, use of this Master Agreement may be accessed by all state, local governments, school districts, public body, public or private health, higher education institutions, or the University's affiliated foundations in the United States for Campus Store Operations. Each participating entity may negotiate and execute a separate Scope of Work (SOW) under this Agreement. Such SOWs shall not alter the terms and conditions of this Agreement unless expressly agreed to in writing by all parties.

Contractor shall provide a comprehensive course materials management solution, including sourcing, delivery, access, billing, and analytics for digital and physical course materials. Services shall be delivered primarily through Contractor's technology platform and online storefront.

Contractor may, with University approval, provide or coordinate physical campus store operations through Contractor or a qualified third-party partner. Contractor shall not be required to directly operate a physical bookstore location, provided that course materials services and student access requirements are met.

Contractor shall act as a best-in-class course materials provider, leveraging a network of publishers, distributors, and service partners to optimize affordability, access, and operational efficiency.

Contractor reserves the right to evolve service delivery models, including digital delivery, distribution methods, and retail partnerships, to align with industry best practices and University needs.

Success metrics shall prioritize student access, affordability, and fulfillment performance rather than solely physical retail sales.

**CONTRACT ADMINISTRATION:**

A. Each participating entity that individually executes its own bridge agreement based from the Master Agreement executed by the University of Mary Washington shall identify its individual Contract Administrators and shall use all powers under the Master Agreement to enforce its faithful performance.

B. The Contract Administrators at each participating entity shall determine the amount, quantity, acceptability, and fitness of all aspects of the services and shall decide all other questions in connection with the services.

**GENERAL TERMS AND CONDITIONS:** The following terms and conditions shall apply to all procurements as required by Commonwealth of Virginia Law or University of Mary Washington policy for goods and services. These terms may be negotiable only through the University's legal counsel. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this Agreement, the Special Terms and Conditions shall apply.

1. **<u>APPLICABLE LAWS AND COURTS:</u>** This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the


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courts of the Commonwealth. The contractor shall comply with all applicable federal, state and local laws, rules and regulations.

2. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.

3. **ETHICS IN PUBLIC CONTRACTING:** By submitting their bids or proposals, bidders or offerors certify that their bids or proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other bidder or offeror, supplier, manufacturer or subcontractor in connection with their bid or proposal, and that they have not conferred with any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.

4. **eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS:** The eVA Internet electronic procurement solution, website portal www.eVA.virginia.gov , streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eProcurement solution by completing the free eVA Vendor Registration. All bidders or offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the bid/proposal being rejected.

   Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:

   A. Effective July 1, 2014, the Vendor Transaction Fees are:
      1. DSBSD-certified Small Businesses: 1%, capped at $500 per order.
      2. Businesses that are not DSBSD-certified Small Businesses: 1%, capped at $1,500 per order.

   The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, approximately 30 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.

5. **IMMIGRATION REFORM AND CONTROL ACT OF 1986:** By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.

6. **PRICE CURRENCY:** Unless stated otherwise in the solicitation, bidders or offerors shall state bid or offer prices in US dollars.

**SPECIAL TERMS AND CONDITIONS:**

1. **ADDITIONAL (FUTURE) GOODS & SERVICES:** The University reserves the right to request from the contractor to provide additional Goods and/or Services under similar and market-based pricing, terms, and conditions, and to make modifications or enhancements to existing services. Additional Goods and Services may include other products, components, accessories, subsystems or related services that are newly introduced during the term of the Agreement. Newly introduced additional Services will be provided to the University at favored nations pricing, terms, and conditions.

2. **ANTITRUST:** By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.

3. **AUDIT:** The contractor shall retain all books, records, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The University, its authorized agents, and/or state auditors shall have full access to and the right to examine any of said materials during said period. Any such inspection or audit shall be at the University's sole expense unless such audit reveals that Contractor has, for any reason, materially misrepresented sales and/or operating expenses. In the event that an audit determines that the statements submitted by Contractor to the University are inaccurate or not in accordance with the terms of this Contract, Contractor agrees to pay the University all monies owed within twenty (20) calendar days plus interest from the date of delinquency at the rate of 1.5% per month. Receipt of such payment shall not preclude the University from pursuing any other right or remedy available under law. In addition, if the audit determines that Contractor has materially misrepresented sales or operating expenses, Contractor shall pay the entire cost of the audit. Any inspection or review by the University does not relieve Contractor of its responsibilities for performing its obligations under this Contract or of any liability arising from Contractor's failure to perform.

4. **CANCELLATION OF CONTRACT / TERMINATION:**
   A. Termination by either Party without cause: This Contract may be terminated by either Party without cause by providing the other Party notice, per Notices Section of Terms and Conditions, by June 1 of any Contract Year for termination to be effective June 30th of the following year.

   B. Termination by either Party for Cause*:
      1. Substandard Performance: If either Party shall be in default in the performance of any material covenant, promise, term, or condition of this Contract, and (i) such default is not cured within thirty (30) calendar days after written notice of default is given by the Party not in default, or (ii) if such default is of a nature that it cannot be cured within thirty (30) calendar days, and the Party in default shall not have promptly commenced curing such default within such thirty (30) calendar day period or shall not thereafter proceed to cure such default with reasonable diligence in good faith without interruption except for causes beyond its control.
      2. Failure to Make Payments: If either Party shall be in default in the making of any payments required to be made hereunder to the Party not in default and such defaults not cured within thirty (30) calendar days after notice thereof is given by the Party not in default.
      3. Failure to comply with contract terms and conditions.

   **Non-renewal of this Contract at the end of the Term shall not constitute termination for cause.*


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C. Termination by either party for Cause: In addition to the foregoing, each party shall have the right to terminate this Contract immediately if the other party:
    1. Acts in a grossly negligent manner or commits intentionally dishonest acts.
    2. Initiates bankruptcy or liquidation, becomes bankrupt, makes a general assignment for the benefit of creditors, takes the benefit of any insolvency act, or has a receiver or trustee in bankruptcy appointed for all or a portion of the party's property.
    3. Fails to maintain top health, safety, and sanitation inspection ratings.
    4. Fails to maintain all licenses and permits required by applicable law or the Contract.
    5. Fails to pay any required taxes.
    6. Fails to comply with all applicable federal, state, and local laws and regulations.
    7. Causes the other party, in its reasonable discretion, to suffer material adverse publicity or material negative impact on its reputation.

D. Conciliation of Performance issues: If the University believes that the Contractor's performance has been substandard, prior to issuing any notice of default, the University shall document Contractor's performance and submit such documentation for review and corrective action. Upon the request of the University, a meeting may be called between the Parties where instances of alleged substandard performance will be discussed and a plan for corrective action shall be developed and implemented. The University, in its reasonable discretion, shall approve in writing the plan for corrective action. The University may terminate the Contract immediately if: (i) University does not agree to the plan developed by Contractor; (ii) University, in its reasonable discretion, determines that implementation of the corrective plan by Contractor is substandard; or (iii) University, in its reasonable discretion, determines that Contractor has failed to implement the corrective plan in a timely manner.

E. Rights Prior to Termination: Termination of the Contract shall not affect any right of either Party that accrued prior to such termination.

F. Reimbursement for Depreciated book value of Contractor improvements: The following conditions shall apply should this Contract and any extension thereof be terminated prior to the full depreciation of Contractor -paid Improvements:
    1. Termination for Cause by University: The University will not pay Contractor for the depreciated book value of Contractor's permanent or fixed Improvements.
    2. Termination for Cause by Contractor: The University will pay Contractor for the depreciated book value of Contractor's permanent or fixed Improvements.
    3. Termination without cause by University: The University will pay Contractor for the depreciated book value of Contractor's permanent or fixed Improvements.
    4. Termination without cause by Contractor: The University will not pay Contractor for the depreciated book value of Contractor's permanent or fixed Improvements.

G. Continued Operation after Termination / Smooth Transition: If this Contract is terminated for any reason, Contractor agrees, at the University's option, to continue operation of the Store in accordance with the terms and conditions of the Contract until a replacement store management company or the University itself is able to commence operations, provided this interim period does not exceed six (6) months from the Termination Date. Upon termination of the Contract, Contractor agrees to assist with a smooth transition of the Store's Services to the University or replacement Services provider. Contractor agrees to:

1. Assist the University in development of a termination and transition plan.
2. Train replacement personnel to use any non-proprietary equipment, software, or process that is to be transferred.
3. Catalog existing procedures and inventory.
4. Document and explain to the UMW Contract Administrator any existing non-proprietary operating procedures, and job descriptions, and backup procedures to University employees or a replacement Services provider.
5. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
6. 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
7. That the University Contracting Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.

H. In the instance of a contract termination UMW will require a new contractor to purchase inventory under the same terms as purchased by Contractor from incumbent.

I. 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 UMW Contract Administrator in writing prior to commencement of said work.

J. Immediately after the termination, if applicable, Contractor shall remove from the selling floor of the Store all of its equipment and merchandise not purchased by the replacement Services provider and leave the Store in similar or better condition than it was found upon the Effective Date, normal wear and tear excepted. Within thirty (30) calendar days of the termination, Contractor shall remove all its equipment and merchandise not purchased by the replacement Services provider from the Store. If Contractor should fail to remove such property, the University may:

1. Consider such property abandoned and do with it as the University so chooses;
2. Move such property into storage and charge the Contractor for the costs of such moving and storage; or
3. Assign such property to the Store's replacement management company, which may use it for whatever purpose it chooses.

**5.** **CHANGES TO THE CONTRACT**: Changes can be made to the contract by written mutual agreement to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.

**6.** **COMPLETE CONTRACT:** This Contract (including the Attachments hereto, each of which is incorporated herein by reference) constitutes the entire agreement between the Parties with respect to the subject matter hereof and supersedes all prior and contemporaneous agreements and understandings, whether written or oral, between the Parties with respect to the subject matter hereof. There are no representations, understandings, or agreements relating to this Contract that are not fully expressed in this Contract.

7. **COMPLIANCE WITH LAWS:** Contractor and University shall comply with all laws, ordinances, rules, orders, and regulations of federal, state and municipal governments, and of any and all of their departments, divisions, bureaus, and subdivisions, applicable to their performance under this Agreement.
   A. Contractor will conform to the applicable provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975 (§ 2.2-4200 and § 2.2-4201), as amended, where applicable, the Virginians with Disabilities Act, the Americans with Disabilities Act, and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1.

   B. Provisions in Contracts over $10,000: Contractor understands and accepts the following provisions:
      1. The University of Mary Washington, an agency of the Commonwealth of Virginia, strictly forbids harassment of any employee, applicant for employment, vendor, contractor or volunteer in the workplace, on the basis of any protected groups, classes or other categories to which they belong or are perceived to belong.
         a. Contractor will not discriminate against any employee or applicant for employment because of race, ethnicity, national origin, age, pregnancy, disability, religion, veterans, gender, gender expression, or sexual orientation/identification, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of Contractor. Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.

         b. The Commonwealth will not tolerate any form of retaliation directed against an employee or third party who either complains about harassment or who participates in any investigation concerning harassment. https://www.dhrm.virginia.gov/docs/default-source/hrpolicy/policyguides/soc-policy-1-60-attachment-a-offenses.pdf Pursuant to the authority provided in Chapter 10 and 12, Title 2.2 of the Code of Virginia.

         c. Title IX: Educational institutions that receive federal financial assistance are covered by Title IX of the Education Amendments of 1972. In compliance with Title IX, the University of Mary Washington prohibits discrimination in employment as well as in all programs and activities on the basis of sex. The University of Mary Washington's Policy on Sexual and Gender Based Harassment and Other Forms of Interpersonal Violence is available for review on the Title IX web page.

         d. Any contractor, in all solicitations or advertisements for employees placed by or on behalf of Contractor, will state that such contractor is an equal opportunity employer.

         e. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.

C. Subcontracts: Contractor will include the provisions of sections A and B above in every subcontract or purchase order over $10,000, so that the provisions will be binding upon each subcontractor or vendor.

**8. CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION:** The contractor assures that information and data obtained as to personal facts and circumstances related to faculty, staff, students or others will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the University's written consent and only in accordance with federal law or the 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 agency 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.

**9. 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. In the event Contractor is not directly operating a physical retail location, transition obligations shall apply to Course Materials Services and any subcontracted Physical Store Operations under Contractor's coordination. The Contractor agrees:
   i. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
   ii. 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
   iii. That the University Contracting 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 Officer, 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

**10. CONTRACTOR AND EMPLOYEE REQUIREMENTS – BONDING AND INSURANCE:** Contractor Personnel may have access to sensitive Personally Identifiable Information (PII). The Contractor shall ensure that all contractor personnel given access to, or sent to work on properties of the University of Mary Washington are bonded and insured; copies of which must be provided to the University prior to the first day of work.

A. If the Contractor, under this contract, creates, obtains, transmits, uses, maintains, processes or disposes of the subset of University Data known as Personally Identifiable Information (PII), or financial or business


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data, the Contractor shall also perform the following background checks on all employees who have potential to access such data in accordance with the Fair Credit Reporting Act:

i. Office of Foreign Assets Control List (OFAC) check
ii. Bureau of Industry and Security List (BIS) check
iii. Office of Defense Trade Controls Debarred Persons List (DDTC)

**11. <u>CONTRACTOR EMPLOYEE REQUIREMENTS – BACKGROUND SCREENS:</u>** The Contractor shall ensure that its employees have undergone background screening and possess all necessary qualifications to comply with the terms of this contract, including, but not limited to all terms related to data and intellectual property protection and physical protection and safety of students, faculty and staff. To this end, all contractor staff considered for full-time or part-time employment on any property owned, leased or otherwise acquired by UMW, shall undergo a background screening, the cost of which shall be incurred by the Contractor, after an offer has been extended, and prior to commencement of work on any UMW property. If Contractor employs the use of a staffing company to provide seasonal or temporary labor at any point during any term of the contract, including optional renewals, background screening shall be performed by the Subcontractor to the same extent as for any full-time or part-time Contractor staff.

A. The results of background checks shall be directed solely to the Contractor, including any criminal convictions. Consideration shall be given to the relationship to the job, how long ago the conviction occurred, the potential risk posed to employees, customers, campus and Contractor, and any other circumstances deemed relevant to the final determination of whether to employ or retain the employee. Conviction information shall be maintained as confidential to the Contractor. If a conviction is found to be relevant to the role and the decision is made not to proceed, the Adverse Action Process shall be commenced, in accordance with the Fair Credit Reporting Act.

B. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, UMW reserves the right to approve or disapprove any contract employee that will work on UMW property. Such request shall be in writing and state the reason. Such reason must be for good cause and may not be for an illegal reason. Disapproval by the University will solely apply to that individual's employment on UMW property and should have no bearing on the Contractor's employment of any individual outside of UMW properties.

C. UMW reserves the right to audit a Contractor's background check process at any time.

D. All Contractor employees shall have a duty to self-disclose any criminal conviction(s) occurring while assigned to the UMW campus. Such disclosure shall be made to the Contractor.

E. Screens shall include:
   1. Enhanced Nationwide Criminal Search; which shall include Social Security Number search, address history, legal name and alias, including for job-related criminal history
   2. DOJ Sex Offender Search and individual evaluation of results
   3. County Criminal Search for all identified counties

**12. <u>CONTROLLING VERSION:</u>** The PDF version of the contract issued by University of Mary Washington Procurement Services is the mandatory controlling version of the document. Any modification and/or additions


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by the Contractor shall not modify the official version of the contract issued by UMW Procurement Services unless accepted in writing by the University.

13. **COOPERATIVE HOLDOVER CLAUSE:** This cooperative contract holdover clause authorizes the Contractor to continue to provide products and services pursuant to any quotation or purchase order executed prior to the expiration or termination of this Agreement. Proposals received and contracts awarded prior to the expiration or termination of this Agreement are eligible for a full five-year term, and allowable renewal terms. The terms and conditions specified herein shall remain in effect for the duration of the holdover period.

14. **COOPERATIVE PROCUREMENT/ADDITIONAL USERS - USE OF AGREEMENT BY THIRD PARTIES:** 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 https://vascupp.org/sites/vascupp/files/2022-08/Governing%20Rules_with_foreword_final_August%202022.pdf), this Contract is being issued by the University on behalf of the Virginia Higher Education Procurement Consortium ("VHEPC"), whose membership consists of the Virginia Association of State College and University Purchasing Professionals ("VASCUPP") and the Virginia Community College Systems ("VCCS"). It is the intent of this Contract to allow for cooperative procurement. Accordingly, this may include any and all state, local governments, school districts, public body, public or private health or higher education institutions or the University's affiliated foundations in the United States may access any resulting contract if authorized by the Contractor.

    Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor, the resultant contract may be extended to the entities indicated above to purchase services in accordance with contract terms. The Contractor will notify the University in writing of any such entities accessing the contract. As a separate contractual relationship, the participating entity will place its own orders directly with the contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate contract is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

    The Contractor will notify the University in writing of any such entities accessing this Contract. The Contractor will provide semi-annual usage reports for all entities accessing the Contract. The 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 the 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. Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

    The Contractor is strongly encouraged to offer additional discounts to all contract participants as the result of increasing aggregated spending among all entities accessing the contract.

15. **DEBARMENT STATUS:** By participating in this procurement, the vendor certifies that they are not currently debarred by the Commonwealth of Virginia or any affiliated agency from submitting a response for the type of

goods and/or services covered by this solicitation. Vendor further certifies that they are not debarred from filling any order or accepting any resulting order, or that they are an agent of any person or entity that is currently debarred by the Commonwealth of Virginia. If a vendor is created or used for the purpose of circumventing a debarment decision against another vendor, the non-debarred vendor will be debarred for the same time period as the debarred vendor.

16. **DEFAULT:** In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.

17. **DELIVERY AND STORAGE:** It shall be the responsibility of the contractor to make all arrangements for delivery, unloading, receiving and storing materials in the building during the term of the contract and all renewals. The owner will not assume any responsibility for receiving these shipments. Contractor shall check with the owner and make necessary arrangements for security and storage space in the building during the term of the contract and all renewals. To the extent applicable to physical goods distribution.

18. **DELIVERY VEHICLE IDLING:** While waiting to advance toward the entity's loading dock to unload payloads, the driver should make every effort to minimize the idling time of the vehicle without risk of damage to temperature-controlled cargo.

19. **DRUG-FREE WORKPLACE:** During the performance of this contract, the contractor agrees to (i) provide a drug free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over $10,000, so that the provisions will be binding upon each subcontractor or vendor.

    For the purposes of this section, "*drug-free workplace"* means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance during the performance of the contract.

20. **ECOLABELS AND STANDARDS:** The U.S. Environmental Protection Agency (EPA) has established recommended specifications, standards, and Ecolabels to assist with the identification and procurement of environmentally sustainable products and services. The Contractor is strongly encouraged to utilize these recommendations when purchasing materials, parts, and products in support of this Contract. The recommendations are found on the **EPA site**. The various Ecolabels, as identified by the EPA, are provided below:


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21. **ELECTRONIC DOCUMENTATION & COMMUNICATION:** When appropriate, the delivery of all documents in support of this Contract should be made by electronic means. Acceptable methods include the affixing of a file(s) to an email; uploading documents to SharePoint or other site as designated by the Participating Entity; or transmitted via a thumb drive. Proprietary or personally identifiable information shall be encrypted. During meetings or presentations, the distribution of hard copy documents to the participants is prohibited.

22. **ELECTRONIC WASTE DISPOSAL:** Disposal of electronic waste incurred in support of this Contract should be through a certified E-Waste Recycler.

23. **ENVIROMENTALLY FRIENDLY PACKAGING:** Items shipped in support of this Contract should consist of the minimal amount of packing material necessary to protect the item(s) during shipment. As appropriate, packaging materials should consist of biodegradable materials.

24. **E-VERIFY PROGRAM: EFFECTIVE 12/1/2013:** Pursuant to the *Code of Virginia, §2.2-4308.2*., any employer with more than an average of fifty (50) employees for the previous twelve (12) months entering into a contract in excess of $50,000 with any agency of the Commonwealth to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to such public contract. Any such employer who fails to comply with these provisions shall be debarred from contracting with any agency of the Commonwealth for a period up to one year. Such debarment shall cease upon the employer's registration and participation in the E-Verify program. If requested, the employer shall present a copy of their Maintain Company page from E-Verify to prove that they are enrolled in E-Verify.

25. **EXTRA CHARGES PROHIBITED:** The proposal price shall be complete; and shall include all applicable freight and any other charges; extra charges invoked by the contractor shall not be honored nor paid. These charges, for example, shall include but not be limited to fees invoked by the vendor for the use of the credit card for payment of invoices, or any order-associated eVA fees. The University expects that these costs, as well as all contractor business expenses will be built into the contractor's quoted price. Credit card "check-out fees" or surcharges MUST be disclosed as a flat fee or percentage of invoice total, and are limited to no more than 3%. The University reserves the right to request certification (with confirmation code) of the vendor's registration

with its merchant bank/VISA to invoke "check-out fees" or surcharges for use of the credit card. "Check-out fees" or surcharges for use of the credit card shall not exceed the vendor's cost of acceptance rate or 3% whichever is less.

26. **FIRE MARSHALL REQUIREMENT:** Absolutely no items are to be left/stored in hallways, stairways or blocking any egress.

27. **FISCAL YEAR PROCESSING:** The University of Mary Washington fiscal year is July 1st through June 30th. Payment cannot be made for multiple fiscal years in advance of services.

28. **FLAME RETARDANT CERTIFICATE:** Contractor shall submit a certification in writing to the Procurement Office that all materials used in fabricating draperies, curtains, and similar hanging textiles are inherently flame retardant or have been treated to meet NFPA Standard 701 (latest version), large or small scale test.

29. **FOREST STEWARDSHIP COUNCIL CERTIFIED (FSC) PAPER:** Contractor should utilize paper that is FSC certified when there is a requirement to provide hard copy documents. FSC certified paper will display the logo below:

FSC

30. **FRATERNIZATION:** Any behavior by any contractor employee that is determined to be inappropriate by the Contract Administrator may be cause for request for removal of the contractor's employee from University property, at minimum, and/or result in contract termination.

31. **INDEMNIFICATION:** Contractor agrees to indemnify, defend and hold harmless the University as an agency of 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 using agency to use the materials, goods, services, or equipment in the manner already and permanently described by the contractor on the materials, goods, services or equipment delivered.

32. **INDEPENDENT CONTRACTOR RELATIONSHIP:** In performing any and all of the services to be provided under this contract, the Contractor shall at all times and for all purposes be and remain an independent contractor. In no case and under no circumstances shall the Contractor or any of its employees, including but not limited to those of its employees actually performing any of the services, have authority to make any representations or commitments on behalf of the University or be considered the agent of the University for any purpose whatsoever. No persons engaged by the Contractor in connection with the provision of Services shall be considered employees of the University. As between the parties, the Contractor shall be responsible for hiring, supervising, training and instructing those individuals performing the services and shall pay any required state and federal taxes on behalf of such persons and provide them with any legally required employee benefits. To the extent applicable to physical goods distribution.

33. **INSPECTION:** All work and materials in each project shall be subject to final inspection by an authorized representative identified by the University. Any omission or failure on the part of such representative to disapprove or reject inferior work or defective work or materials shall not be construed to be an acceptance of any such work or material. If any defective work or materials are found during inspection, the Contractor shall remove or repair, at his own expense, such defective work or rejected material and shall correct and/or replace same without extra charge.

34. **INSTALLATION:** All items must be assembled and set in place, ready for University use. All crating and other debris must be removed by the contractor from the premises.

35. **INSURANCE:** By signing and submitting a bid or proposal under this solicitation, the bidder or offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with §25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et seq. of the Code of Virginia. The bidder or offeror further certifies that the contractor and any subcontractors will maintain these insurance coverages during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

    MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

    Workers' Compensation - Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirements under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.

    Employer's Liability - $100,000.

    Commercial General Liability - $1,000,000 per occurrence and $2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.

    Automobile Liability - $1,000,000 combined single limit. Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third-party owner of such motor vehicle).

36. **LABELING OF HAZARDOUS SUBSTANCES:** If the items or products used by the Contractor in the performance of this Contract are "Hazardous Substances" as defined by § 1261 of Title 15 of the United States Code (U.S.C.) or "Pesticides" as defined in § 136 of Title 7 of the United States Code, then the Contractor, certifies such items or products shall be properly labeled as required by the foregoing sections and that by delivering the items or products the Contractor does not violate any of the prohibitions of Title 15 U.S.C. § 1263 or Title 7 U.S.C. § 136.

37. **LICENSES and PERMITS:** Contractor shall obtain and maintain at its sole expense, and in its name, all necessary licenses and permits required to perform the Services.

38. **MAINTENANCE MANUALS:** The Contractor shall provide with each piece of equipment an operations and maintenance manual with wiring diagrams, parts list, and a copy of all warranties.

39. **NON-ASSIGNMENT:** Neither Party shall assign or transfer its rights or obligations under this Contract without the prior written consent of the other Party.

40. **NON-EXCLUSIVITY:** Contractor's exclusive rights do not include merchandise and services currently sold elsewhere within the University by departments or student organizations, or through other existing agreements or contracts, so long as these groups or agreements do not contract with an outside third party (e.g. Publisher, Amazon, Chegg, etc.). The University, in its sole discretion, now and in the future, shall retain the right to provide other retail operations on campus, operated directly or through other contractual arrangements. However, such other retail operations will not unreasonably compete with the primary merchandise categories typically found in university bookstores, either in-store or on-line. Notwithstanding the foregoing, Contractor shall serve as the University's primary partner for Course Materials Services. Physical retail operations may be delivered through Contractor or a Third-Party Retail Operator and are not required to be exclusive to Contractor.
    A. State Contract Restrictions: The Commonwealth of Virginia requires use of certain state contract items by University departments. Contractor understands and accepts that University departments are not permitted to use state funds to purchase such items from the Store if they are found on state contracts.

41. **NOTICES:** Any official legal notice, demand, request, consent, approval or communication required by this Agreement to be provided in writing by either party, shall be addressed to the University or Contractor at their respective addresses entered below. These notices shall be sent via certified mail, return receipt requested, and shall be considered by the sender received within five (5) days of delivery to the U.S. Postal Service (for deliveries within the continental U.S.), or via the stamped evidence of delivery, whichever occurs first. Any unofficial notices or communications may be sent via electronic mail.

| If to the University: | If to the Contractor: |
|---|---|
| University of Mary Washington | Ambassador Education Solutions |
| Attn: Procurement Services | Attn: Marc Konesco |
| 1301 College Avenue | 445 Broadhollow Road |
| Fredericksburg, VA 22401 | Melville, NY 11747 |

42. **PRIME CONTRACTOR RESPONSIBILITIES:** The Contractor shall be responsible for completely supervising and directing the work under this contract and all contractors that Contractor may utilize, using Contractor's best skill and attention. Contractors that perform work under this contract shall be responsible to the Contractor. The Contractor agrees that it is as responsible for the acts and omissions of its Contractors as it is for the acts and omissions of its own employees, when each is acting in the course and scope of their agency or employment, as the case may be. Contractor's primary responsibility under this Agreement is the delivery of Course Materials Services. Physical retail operations, if provided, are ancillary to the core service model.
    A. SUBCONTRACTS: Contractor may subcontract Physical Store Operations, including retail bookstore

management, to a qualified Third-Party Retail Operator, subject to University approval, which shall not be unreasonably withheld. Contractor shall remain fully responsible for all subcontracted services and performance under this Agreement. Contractor shall not be required to directly operate a physical bookstore location, provided that Course Materials Services and student access obligations are met.

B. SMALL BUSINESS CONTRACTING: Except with respect to course materials, Contractor will make reasonable efforts to maximize DSBSD-certified small business participation through a competitive bid process while fulfilling Bookstore operational needs for the University.

C. Contractor shall pay its outside vendors or subcontractors in a timely manner consistent with each vendor's payment terms.

43. **PROCUREMENT MANUAL:** This contract is subject to the provisions of the Commonwealth of Virginia Procurement Manual for Institutions of Higher Education and their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. The manual may be viewed at http://vascupp.org.

44. **PROHIBITION OF HAZARDOUS MATERIALS:** The use of hazardous material is prohibited in support of this Contract. A hazardous material is defined by the Institute of Hazardous Materials Management as any item or agent (biological, chemical, radiological, and/or physical), which has the potential to cause harm to humans, animals, or the environment, either by itself or through interaction with other factors.

45. **RECYCLING POLICY:** It shall be the policy of the University of Mary Washington to support and encourage conservation and recycling efforts by vendors, students, faculty and staff, where possible.

46. **RENEWAL OF CONTRACT:** This contract may be renewed by the University upon written agreement of both parties for five (5) one-year successive terms, or as negotiated, under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration.

47. **SAFETY:** The provisions of all rules and regulations regarding safety as adopted by the Safety Codes Board of the Commonwealth of Virginia issued by the Department of Labor and Industry under Title 40.1 of the Code of Virginia, or any updates, shall apply to all work under this contract. The Contractor shall provide a copy of his/her company safety plan and appropriate material safety data sheets to the University's Safety and Environmental Health Office upon request. Submitted material shall be maintained current during the term of the contract. At the discretion of the University, Contractor personnel may be required to attend a safety orientation briefing to be conducted by the University at a location selected by the University prior to performing work at the University.

48. **SECTION HEADINGS:** Section headings are for the convenience of the parties; and in no way alter, modify, amend, limit, or restrict the contractual obligations of the parties.

49. **SEVERABILITY:** If any term or provision of this Agreement is found by a court of competent jurisdiction to be invalid, illegal or otherwise unenforceable, the same shall not affect the other terms or provisions hereof or the whole of this Agreement, but such term or provision shall be deemed modified to the extent necessary in the court's opinion to render such term or provision enforceable, and the rights and obligations of the parties

shall be construed and enforced accordingly, preserving to the fullest permissible extent the intent and agreements of the parties herein set forth.

**50.** **SPECIAL EDUCATIONAL OR PROMOTIONAL DISCOUNTS:** The contractor shall extend any special educational or promotional sale prices or discounts immediately to the University during the term of the contract. Such notice shall also advise the duration of the specific sale or discount price.

**51.** **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 procurement 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 assure compliance with all requirements of the contract.

**52.** **TAXES:** Contractor shall be solely responsible for any and all tax obligations imposed upon it under federal, state or local law associated with this contract, including the collection and timely payment of all applicable taxes, as well as those that may be levied after the Effective Date. The parties understand that sales to the University would be expected to be exempt from state sales tax where the University is deemed to be the purchaser under state or local sales tax law. Contractor agrees that it shall not seek any reimbursement from the University of taxes imposed upon it under applicable law Sales to the University are normally exempt from state sales tax. State sales and use tax certificates of exemption, Form ST -12, will be issued by the University upon request. Notwithstanding the provisions of Section IV above, to the extent permitted by applicable law, the University shall indemnify the Contractor for all sales taxes, interest and penalties to the extent that these are imposed on the Contractor on any transaction where (1) the Contractor does not collect sales tax at the request of the University and (2) any state taxing authority determines that the purchase by the University was not exempt from sales tax under applicable law.

**53.** **THEFT OR OTHER CRIMINAL BEHAVIOR:** Contractor shall not arrest or prosecute University students, faculty, or staff suspected of theft or other criminal activity without prior consultation with and approval from the University Representative and/or the University's Police department. Contractor is solely responsible for all investigations related to thefts, damages, or losses that occur in the Store, as well as for reimbursement due customers for losses or damages they incur there.

**54.** **USE OF RECHARGEABLE BATTERIES:** Battery based tools, equipment, or fixtures utilized in support of this Contract should be rechargeable.

**55.** **USE OF REGISTERED MARKS, LOGOS and SEALS:** The names, trademarks, and logos of each party are the exclusive property of such party, and each party reserves all rights in and to its own marks. Each party shall use the marks of the other party only in connection with its performance under this Agreement, provided, however, Contractor may use University's name in any of its required public filings. The University shall grant to Contractor the right to sell University-licensed products and use the University's name, seals and logos; however, the right is not exclusive. Contractor understands and accepts that the University's trademarks are owned solely and exclusively by the University, and Contractor agrees to use such trademarks only in the form and manner and with the appropriate legends as prescribed by the University. All use of trademarks shall inure to the benefit of the University. (ref. https://adminfinance.umw.edu/business-services/licensing/)

56. **WORK SITE DAMAGES AND PROTECTION OF PERSONS AND PROPERTY:** The Contractor agrees to take every precaution at all times for the protection of persons and property, including employees, students, and the public. Any damage, including damages to finished surfaces, resulting from the performance of this contract shall be repaired to the University's satisfaction at the Contractor's expense. Any damage to existing utilities, equipment or finished surfaces resulting from the performance of this contract shall be repaired to the University's satisfaction at the contractor's expense.
    A. Damages and Losses: Contractor shall be financially responsible for any loss or damage to property owned by the University or others that is in Contractor's possession or control, or is caused by Contractor or its employees or agents in the course and scope of their employment.

57. **WORK SITE USE:** The Contractor expressly undertakes, either directly or through its subcontractors:
    A. To comply with the regulations governing the operation of premises and to perform its contract in such a manner as not to interrupt or interfere with the operation of any existing activity on the premises or at the location of work.

    B. To store all apparatus, materials, supplies and equipment in such orderly fashion at the site of the work as will not unduly interfere with the progress of the work or the University's use of the facilities.

    C. To place upon the work or any part thereof only such loads as are consistent with the safety of that portion of the work.

    D. To clean up frequently all refuse, rubbish, scrap materials, and debris caused by operations.

    E. To perform contract in such a manner as not to interrupt or interfere with the operation of any existing activity on the premises or with the work of any contractor.

    F. Vehicle parking shall be permitted in designated areas. Contractor shall obtain approval through the Contract Administrator for parking in other areas.

**METHOD OF PAYMENT/PAYMENT TERMS:** The contractor shall be paid using one of the following methods for all University initiated procurements:

1. University Charge Card: At the time of verified receipt of goods or services, if the Contractor accepts credit cards in payment, the University will authorize payment by UMW charge card, currently through the Bank of America Visa. Any "Check-out fees" imposed by the contractor must be disclosed prior to the purchase. No check-out fee or surcharge may be greater than 3% of the total sale, effective 4/15/2023. The University expects that these costs, as well as all contractor business expenses will be built into the contractor's quoted price.
2. Virtual Payables through Bank of America: All payments under Virtual Payables will have a net 16 payment term.
3. Check or ACH: Payment will be made 30 days after satisfactory performance of the contract in all provisions thereof and upon receipt of a properly completed invoice, whichever is later; in accordance with Chapter 43, VPPA, Article 4, Code of Virginia.


1301 College Avenue
Fredericksburg, VA 22401-5300
procure@umw.edu
adminfinance.umw.edu/procurement

To be considered eligible for payment, all physical invoices must be received at the address below and should reference the eVA purchase order and UMW contract numbers as applicable. All electronic invoices must be sent to invoices@mail.umw.edu. *The University will not be responsible for late payment or nonpayment of invoices not received directly by Accounts Payable at this email address or at the mailing address indicated (below).*

UNIVERSITY OF MARY WASHINGTON
Attn: ACCOUNTS PAYABLE
1301 COLLEGE AVENUE
FREDERICKSBURG, VA 22401

**CONTRACT EXHIBITS:**

A. Original RFP Solicitation – RFP 25-1828: Campus Store Operations *dated 2.7.25*
B. RFP Addendum 1 *dated 2.28.25*
C. RFP Addendum 2 *dated 3.6.25*
D. VHEPC PAC Agreement
E. Vendor Proposal *dated 3.10.25*

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

In witness, whereof, the parties have caused this Contract to be duly executed intending to be bound thereby.

| **AMBASSADOR EDUCATION SOLUTIONS** | | **UNIVERSITY OF MARY WASHINGTON** | |
|---|---|---|---|
| Signature: | DocuSigned by: Steven M. Blicht 42B7D49D671D45B... | Signature: | Signed by: Melva A. H. Kishpaugh 9E0337A71D1845B... |
| Printed Name: | Steven M. Blicht | Printed Name: | Melva A. H. Kishpaugh |
| Title: | CEO | Title: | Director, Procurement Services |
| Date: | 7/21/2026 | Date: | 7/21/2026 |
| Phone: | 6,317,701,010.00 | | |
| Email: | sblicht@ambassadored.com | | |

**Exhibit A**

University *of* Mary Washington

# Request for Proposal

RFP 25-1828

Campus Store Operations

February 7, 2025

https://vascupp.org/

https://vhepc.org

A VASCUPP™ and VHEPC Member Institution

Issued by Procurement Services

Fredericksburg, Virginia

University of Mary Washington
Procurement Services

# SEALED REQUEST FOR PROPOSAL (RFP)

| | |
|---|---|
| **ISSUE DATE:** | February 7, 2025 |
| **RFP NUMBER & TITLE:** | RFP 25-1828; Campus Store Operations |
| **PROPOSAL DUE DATE & TIME:** | March 10, 2025 by 2:00 PM<br>NOTE: Proposals received after the due date and time cannot be accepted. |
| **PROPOSAL DELIVERY ADDRESS:** | University of Mary Washington<br>Procurement Services /Reference RFP 25-1828<br>Eagle Village Executive Offices, Suite 480<br>1125 Emancipation Hwy., Fredericksburg, VA 22401 |
| **WORK LOCATION:** | ☐ All Campuses ☒ Fredericksburg ☐ Stafford ☐ Dahlgren |
| **COMMODITY CODE(S):** | 20454, 71512, 71583, 71588, 78570, 92471 |
| **PRE-PROPOSAL CONFERENCE:** | ☒ Optional ☐ Mandatory ☐ N/A **DATE & TIME:** February 18, 2025; 10:00 AM |
| **PRE-PROPOSAL LOCATION:** | 1125 Emancipation Hwy., Fredericksburg, VA 22401 – Suite 480 Conference Room or Zoom (a link will be provided upon registration) |
| **CONTRACT OFFICER:** | Lindsay Fare **PHONE:** 540-654-1057 **EMAIL:** lfare@umw.edu |
| **PERIOD OF CONTRACT:** | Date of Award through June 30, 2031, with five (5) one-year renewal options or as negotiated. |

In compliance with this Sealed Request for Proposal (RFP) and to all the conditions imposed therein, and hereby incorporated by reference, the undersigned firm offers and agrees to furnish the goods/services in accordance with attached signed proposal or as mutually agreed upon by subsequent negotiation. The undersigned firm hereby certifies that all information provided in response to this RFP is true, correct and complete.

By signing this proposal, you are certifying that you are an authorized representative of the offering firm and that the firm's principals or legal counsel have reviewed the Request for Proposal General Terms and Conditions and any Special Terms and Conditions. Any exceptions to the General or Special Terms and Conditions must be clearly identified in your proposal. No exceptions can be taken to those General or Special Terms and Conditions that are mandated by law. If no exceptions are identified in your proposal, it is understood that the provisions will become a part of any final agreement.

**THIS FORM MUST BE COMPLETED AND RETURNED WITH PROPOSAL**

Name of Offering Firm: ______________________

Address of Offering Firm: ______________________

DSBSD Certification No.: ______________ Expiration Date: ______________

eVA ID: ______________ Tax ID: ______________

Email: ______________ Telephone: ______________

Website: ______________ Fax: ______________

Submitted By (Print Name & Title): ______________________

**Signature (In Ink):** ______________ Date: ______________


1301 College Avenue
Fredericksburg, VA 22401
procure@umw.edu
adminfinance.umw.edu/procurement

**SEALED REQUEST FOR PROPOSALS (RFP)**

I. **QUESTIONS/INQUIRIES:** All inquiries for information should be directed via email to the Contract Officer listed above, referencing the RFP by title and number. No questions will be accepted after **2:00 PM** on **February 25, 2025.**

II. **PRE-PROPOSAL CONFERENCE:** An **optional** pre-proposal conference will be held on **Tuesday, February 18, 2025 at 10:00 AM** in the **Suite 480 Conference Room, located at 1125 Emancipation Hwy., Fredericksburg, VA 22401**. A Zoom link will be provided to those who are unable to attend in person. Please email Lindsay Fare at lfare@umw.edu or call 540-654-1057 to RSVP. See Pre-Proposal Conference clause in the Special Terms and Conditions.

   a. No attendee will be permitted access to the conference after **10:00 AM**.
   b. Bring a copy of the RFP with you to the conference.
   c. Parking is available to visitors who plan to attend in person in designated locations which can be found on the UMW campus map here: http://www.umw.edu/visitors/
   **Please allow yourself extra time for parking as it can be difficult to find a space if the parking garage is not utilized.*

III. **PROPOSAL RECEIPT REQUIREMENTS:** Sealed Proposals for furnishing the services described herein may be submitted electronically via eVA **OR** physically delivered to the Contract Officer on Page 1.

   A. **Electronic Online Response via eVA:**
      1. The Offeror may submit their proposal via the electronic online response function within the solicitation posting on the eVA Virginia Business Opportunities (VBO).
      **If you run into issues submitting your proposal electronically through eVA, please contact eVA Customer Care at 1-866-289-7367.*

   B. **Physically delivered to the Contract Officer:**
      1. Sealed Proposals must reach the Proposal Delivery Address shown on Page 1 and be appropriately date/time stamped by the Procurement Services Official Time Clock prior to the proposal due date/time in order to be considered. It is the responsibility of the offeror to ensure that the proposal is received on time.

      2. The Offeror shall contact the Contract Officer listed on Page 1 to schedule a date/time to hand-deliver the proposal. This will need to be done if the offeror intends to physically drop off their proposal instead of submitting electronically or mailing it.

      3. Proposals must be submitted in a sealed envelope or container that clearly identifies the contents as a response to this RFP. RFP 25-1828 should be referenced on the front of the package. One electronic copy of the proposal shall also be provided on a USB flash drive.

      4. UMW Procurement Services Office is located in the Eagle Village Executive Offices, Suite 480, and can only be accessed by a single elevator which accommodates the entire building. There is no stair access without a keycard. It is imperative that you allow adequate time to make a delivery.

      5. UMW requires the inclusion of a clearly marked redacted proposal if any portion of the Offeror's proposal contains proprietary information.

C. Eligibility of Award: To be eligible for contract award an Offeror must be self-registered in the Commonwealth of Virginia e-procurement system (eVA). If you are not registered, the link to the registration is provided as follows: https://eva.virginia.gov/register-now.html

D. The issuance of this solicitation does not guarantee an award of a contract.

**IV. ADDENDA**: Any changes resulting from the University's requirements will be issued in an addendum and will be posted on the eVA website: http://www.eva.virginia.gov. It is the sole responsibility of the Offeror to check for all changes to the RFP prior to submission.

A. If this RFP is amended by published addenda, then all terms and conditions which are not modified shall remain unchanged and effective.

B. Firms shall acknowledge receipt of any addendum to this RFP by signing and returning the addendum or by other written means of acknowledgement.

**V. INCLEMENT WEATHER/SUSPENDED SCHEDULE:** Proposal receipt deadline scheduled during a period of suspended state business operations, including school closing due to inclement weather, will be rescheduled for processing at the same time on the next regular business day. It is your responsibility to check UMW's website or call for closing information: www.umw.edu or (540) 654-2424.

**VI. PUBLIC RELEASE OF INFORMATION:** UMW utilizes a Public Contracts Portal (Cobblestone) https://umw.cobblestonesystems.com/public/ for posting of procurement documents, including winning proposals. Further, if the resulting contract includes cooperative language, the VASCUPP public portal https://vascupp.org/contracts will be used to house relevant procurement documents, including winning offeror's proposal.

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***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.***


1301 College Avenue
Fredericksburg, VA 22401
procure@umw.edu
adminfinance.umw.edu/procurement

## I. PURPOSE:

This Request for Proposal (RFP) is being issued by the University of Mary Washington ('UMW' or 'the University'), on behalf of the Virginia Higher Education Procurement Consortium (VHEPC). The intent and purpose of this RFP is to solicit sealed proposals from qualified sources to establish a multi-year contract through competitive negotiations with one or more qualified firms to provide Campus Store Operations as outlined herein to the Fredericksburg Campus of the University of Mary Washington, an agency of the Commonwealth of Virginia. It is intended for the resulting contract(s) to include cooperative language for the benefit of all public bodies and other entities referenced herein.

Founded in 2014, the VHEPC leverages collective buying power to create efficiency and value for its member institutions. Guided by strategic sourcing principles and grounded in data analytics, VHEPC drives development of cooperative contracts and provide a forum for schools to share learnings and best practices. By design, the VHEPC aims to facilitate opportunities for small-, minority-, woman-, and veteran-owned businesses in the procurement marketplace.

Membership includes 14 of Virginia's senior public higher education institutions, the Virginia Association of State College and University Purchasing Professionals (VASCUPP) Board of Directors, and the Virginia Community College System (VCCS), which represents 23 schools across the state. While VHEPC and VASCUPP are separate organizations, they have a collaborative relationship that generates procurement advantages for the schools they dually support. The Consortium is governed by a leadership council with representation from member doctoral institutions, four- and two-year institutions, and the community college system.

A technical advisory committee composed of procurement professionals from member schools serves to target opportunities for cooperative sourcing. And dedicated resources (employed by their host institution, the University of Virginia) work on behalf of their members to provide strategic and analytical direction and contract administration.

The value created through their aggregate spend is also value they share with the greater procurement community. Their publicly accessible contracts are available for use by any agency, public or private.

Additional VASCUPP and VHEPC member institutions are included in the solicitation process for future awareness and opportunities should any institution make a business decision to access this cooperative VHEPC contract at any time.

The initial contract shall be for five (5) years, with an option to renew for five (5) additional one-year periods. UMW reserves the right to negotiate an alternative term or renewal period at its discretion, subject to mutual written agreement by both parties.

## II. ORGANIZATION OVERVIEW:

Founded in 1908, the University of Mary Washington, is a premier, selective, coeducational, public liberal arts institution that offers rigorous academics in small classroom settings, innovative master teachers, a supportive campus community that values honor and integrity, and a civically, socially, and intellectually engaged community. Located within the Commonwealth of Virginia in Fredericksburg, UMW resides within an hour's drive of both the nation's Capital of Washington, D.C. and the State Capital of Richmond, offering students unique opportunities for internships, research excursions, and recreation. The University currently consists of three colleges for Arts and

Sciences, Business, and Education, and two additional campuses: one in Stafford, VA and the other in Dahlgren, VA. For more information about the University of Mary Washington: http://www.umw.edu/about/.

## III. BACKGROUND:

The current University of Mary Washington Campus Store provides course materials, reference materials, general reading books, and other supplies needed and/or requested by students, faculty and support staff in pursuit of the University's educational mission. The Campus Store also promotes the image of the institution and fosters a sense of loyalty and school spirit through the sales of insignia merchandise and other memorabilia to the university community, alumni, and the public. The Campus Store is a service-oriented operation and is sensitive to the needs of the university community while operating in a fiscally sound manner.

Since 2019, the University of Mary Washington has contracted the services of Barnes & Noble College Booksellers, LLC for Bookstore and Retail Operations as a result of the prior solicitation. Information regarding the current contract may be found here:
Cobblestone Public Contract Portal – UMW 18-797

A. Campus Store Location: 1301 College Avenue, Lee Hall 3rd floor, Fredericksburg, VA 22401. Lee Hall also houses Academic Services, Financial Aid, and Admissions, EagleOne Card and Parking Services. Lee Hall is located on Campus Walk near the center of campus, and across from the Cedric Rucker University Center, an accessible location to students and the community, which houses dining, offices and student spaces.

B. Gross Sales: Sales for the period of July 1, 2023 through June 30, 2024 are as follows:

| Merchandise Division | Gross Sales |
|---|---|
| Digital Books | $ 491,073 |
| New Textbooks | $ 154,136 |
| Textbook Rentals | $ 134,196 |
| Trade Books | $ 14,648 |
| Used Books | $ 64,567 |
| Total Book Merchandise | $ 858,620 |
| Convenience | $ 23,833 |
| Computer Products | $ 27,063 |
| Emblematic Clothing & Gift | $ 355,427 |
| Other | $ 122,463 |
| School Supplies | $ 60,112 |
| Total General Merchandise | $ 588,898 |
| Other Revenue | $ 17,246 |
| Total Gross Sales | $ 1,464,764 |

C. Revenue for the previous four contract years are as follows:

| | | Fall FTE | |
|---|---|---|---|
| Contract Year (FY20 – FY23) | Revenue | UG | Grad |
| July 1, 2019 – June 30, 2020 | $ 1,629,552 | 3,703.47 | 192.50 |
| July 1, 2020 – June 30, 2021 | $ 1,240,040 | 3,274.20 | 193.92 |
| July 1, 2021 – June 30, 2022 | $ 1,363,747 | 3,112.27 | 170.75 |
| July 1, 2022 – June 30, 2023 | $ 1,530,546 | 3,196.67 | 108.33 |

D. The University utilizes Ellucian's "Banner" product as its Enterprise Resource Planning system (ERP). The Contractor must be able and prepared to interface its systems with Banner to the extent necessary to provide the best service possible. Costs for such are the sole responsibility of the firm.

E. The Campus Store is the repository for course material listings in keeping with the Higher Education Opportunity Act.

F. The EagleOne Card is issued to all members of the University Community and is the official identification card of University of Mary Washington. It is a key to access, meal plans, libraries, the Fitness Center, and the EagleOne debit account.

G. Canvas is the Learning Management System used by the University of Mary Washington

The University will not guarantee any particular usage amount during any period of the resulting contract, nor will it be held responsible in any way if contract usage exceeds or does not meet this estimate.

## IV. CONTRACT PARTICIPATION – COOPERATIVE PURCHASING/USE OF AGREEMENT BY THIRD PARTIES:

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 https://vascupp.org/sites/vascupp/files/2022-08/Governing%20Rules_with_foreword_final_August%202022.pdf). This RFP is being issued by the University on behalf of the Virginia Higher Education Procurement Consortium ("VHEPC"), which includes all members from the Virginia Association of State College and University Purchasing Professionals ("VASCUPP"). Reference the VASCUPP Zone Map in Attachment E. It is the intent of this RFP and resulting contract to allow for cooperative procurement. Accordingly, this may include any and all state, local governments, school districts, public body, public or private health or higher education institutions or the University's affiliated foundations in the United States may access any resulting contract if authorized by the Contractor.

B. Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor, the resultant contract may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. The Contractor will notify the University in writing of any such entities accessing the contract. No modification of this contract or execution of a separate contract is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

C. 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 to include contractual disputes, invoicing and payments without direct administration from the University.

D. UMW 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 UMW 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. Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

E. Use of this contract does not preclude any participating entity from using other contracts or competitive processes if need be. The Contractor is strongly encouraged to offer additional discounts to all contract participants as the result of increasing aggregated spending among all entities accessing the contract. A plan for extending deeper discounts among all contract participants will be requested during negotiations.

## V. SMALL, WOMAN-OWNED AND MINORITY-OWNED (SWAM) PARTICIPATION:

It is the policy of the Commonwealth of Virginia to contribute to 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 firms to provide for the participation of Small (includes Micro) and otherwise Diverse Businesses through partnerships, joint ventures, subcontracts, and other contractual opportunities. UMW has established a goal of 42% SWaM expenditures, which includes a 15% aspirational goal for expenditures with women and minority-owned businesses. The most competitive suppliers will have SWaM utilization plans that support UMW's supplier diversity commitment.

## VI. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:

A. **GENERAL PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:**

1. Proposal Requirements - The University reserves the right to:
   - accept or reject any and all proposals, in whole or in part, received as a result of this RFP,
   - waive minor informalities,
   - issue a lowered evaluation of the proposal for failure to submit all information requested,
   - negotiate with any or all responsible vendors in any manner necessary to serve the best interests of the University, or accept the best proposal as submitted, without negotiation.

   Any proposal submitted without a signature binding the Offeror to the proposal will be considered non-responsive and may be rejected. This Request for Proposal creates no obligation on the part of the University to award a contract or to compensate vendors for proposal preparation expenses.

2. Protection of Trade Secrets/Proprietary Information: The Virginia Freedom of Information Act "FOIA" requires release of any procurement documents that are not appropriately marked and protected through the Trade Secrets or Proprietary Information provisions outlined in the paragraphs below.

   If the Offeror intends to protect any Trade Secrets or Proprietary Information, they must:
   - invoke the protection of the Code of Virginia, § 2.2-4342F, **in writing,** stating the reasons why protection is necessary, and
   - submit, at the same time as the original proposal submission, a separate redacted version of the proposal which contains identical content, but blacks out any protected information not appropriate for public release. ***If a redacted proposal is not received at the same time as the original proposal, no part of the document may later be protected by the Offeror and restricted from public review.***

   **The designating of an entire proposal document, line item prices and/or total proposal prices as proprietary or as a trade secret is not acceptable.** If, after being given reasonable time, the Offeror refuses to withdraw the entire proposal designation as redacted, the proposal will be rejected.

3. Oral Presentations: 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. This is a fact-finding and explanation session only and does not include negotiation. *Oral presentations are an option of the university and may not be conducted. Therefore, proposals submitted in response to this RFP should not be submitted with the presumption that there will be opportunities to revise that proposal after submission.*

4. Number of Proposals Required:
   a. If submitting an electronic response via eVA: One (1) original electronic version of the proposal is required and one (1) separate electronic version clearly marked redacted copy must be submitted if required by vendor.
   b. If delivering in person **OR** mailing: One (1) printed original and one (1) electronic media version (Flash Drive) of each proposal is required. Please make sure the electronic version is not password protected without submitting the password or corrupted prior to submitting. One (1) separate printed original and one (1) separate electronic media version (Flash Drive) clearly marked redacted copy must be submitted if required by the vendor.

5. Proposal Formatting and Content: Proposals should be as detailed as possible so that the University of Mary Washington may properly evaluate the Offeror's capabilities to provide the required services. Proposals should be:
   - Prepared simply and economically, with the ability to be recycled
   - Held together by a simple staple, a binder clip, or a three-ring binder if necessary (semi-permanent or non-recyclable materials, such as plastic combs or spiral wire, are not preferred binding methods per the University's sustainability initiatives)
   - Dual-side printed where practical
   - Bound in a single volume where practical
   - Straightforward and concise

6. Limited Contact: To ensure timely and adequate consideration of your proposal, Offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the UMW Procurement Office Contract Officer indicated on the face of this document for the duration of this Procurement process. Failure to do so may jeopardize further consideration of an Offeror's Proposal.

B. **SPECIFIC PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:** Proposals should be as thorough and detailed as possible. Offerors are required to submit the following items within the proposal:

1. Overview:
   a. State the Firm's legal entity name and headquarters address.
   b. Provide Firm's W9 or at minimum tax identification number (TIN)
   c. Provide the name, title, address, telephone number, and email of the individual who will act as the Firm's designated representative for purposes of this RFP.

2. Introduction:
   Provide an introduction of the Firm and all major subcontractors who will be involved in the performance of the work. Include primary business experience, length of time in business, ownership, office locations, and specific location of the principal office from where UMW work will be performed and any other information of an introductory nature.

3. Qualifications of the Firm:
   Describe how your firm's overall experience demonstrates your ability to successfully complete the Statement of Needs. Provide a detailed list of services you have provided to clients over the past three years which are similar to those required by UMW.

4. Qualification of the Staff:
   Identify the staff members who will provide the services required by the proposal, including years and type of experience for each person. Experience should include number of years at current firm as well as all prior service.

5. Work Plan:
   The Work Plan must contain a comprehensive description of the goods and/or services including the following elements:
   a. General – This section of the proposal must contain sufficient detail to convey the methodology or work plan contemplated for use. Firms must describe how the services listed in the Statement of Needs shall be performed.
   b. Deliverables – Fully describe all of the deliverables to be submitted under the proposed contract.
   c. Work Schedule/Timeline – Include a work schedule/timeline indicating when the elements of the work will be completed and when deliverables will be provided. Suggestions, if any, for streamlining the work schedule should be presented. Cost implications for streamlining the schedule should be presented, if applicable.
   d. Outcomes and Performance Measurement – Describe the impacts/outcomes Firms intend to achieve, including how these outcomes would be monitored, measured and reported to the University.
   e. Overall Risk – Define risks significant to the success of the work. Include how you propose to effectively monitor and manage these risks, including the reporting of risks to the University (i.e., how you will manage staff turnover or other issues that may negatively impact the work, their potential and how you would propose to mitigate them).

6. Complete and Return Attachment F: Small Business Subcontracting Plan.

7. Submit any exceptions the Offering firm takes to the Terms and Conditions as stated in this RFP.

8. Any other information the Offeror believes will help the University evaluate its proposal.

   Please review the Proposal Submission Checklist attached to this RFP prior to submission.

## VII. STATEMENT OF NEEDS:

### A. University Campus Store Overview:

The University currently partners with Barnes & Noble College Booksellers, LLC (B&N) to manage course materials and general merchandise. The physical store is located near the center of the campus on the 3rd floor of Lee Hall. Current retail space is 7,360 SF. The current retail footprint may be reduced in order to optimize retail space and to co-locate complimentary services. If proposal includes a physical store, provide the optimal square footage the proposal requires.

**B. Program Objectives:**

This section describes the University's requested goods and/or services and outlines the areas to be addressed in proposers' submissions. The University invites proposals from highly qualified Firms to provide comprehensive management services for its retail operations. We are open to receiving proposals that cover both merchandise and course material services combined or proposals that focus solely on one of these areas, merchandise OR course materials. Proposals may include offerings online, on site, or a combination of both.

1. Flexibility in Proposals: Proposers may submit for managing both merchandise and course material services together, or they may choose to bid on only one of the services. The University will evaluate separate and combined bids on their merits and may award contracts for each service separately or as a combined service depending on which approach best meets the University community's needs and standards of quality and efficiency.

   The primary aim is to partner with a Firm or Firms that can elevate the University's retail offerings while prioritizing customer satisfaction and student needs. Firms bidding on separate services are expected to demonstrate their willingness and capability to work cooperatively with other service providers, should different firms be selected for merchandise and course materials services.

   Proposal response must be written in the same order as outlined below. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities. Emphasis should be placed on completeness and clarity of content. Failure to submit all information requested may result in the elimination of the Proposal from consideration. Proposals that are substantially incomplete or lack key information may be rejected by the University.

2. The Firm will be expected to meet the following refined objectives:
   a. Enhanced Merchandise and Services: Supply a wide assortment of high-quality academic and retail products, including course materials (both physical and digital), supplies, literature, and fashionable "soft goods" featuring University branding, designed to cater to the unique preferences of each campus community.

   b. Affordability and Student Satisfaction: Commit to affordability in course materials and "soft goods" in order to enhance the overall student experience with the campus store, aiming for high satisfaction rates through cost-effective strategies, high quality products, and excellent service.

   c. Transparency and Academic Collaboration: Increase operational transparency, especially regarding sales, and streamline the process for faculty to integrate campus store resources into their curriculum, enhancing academic support and compliance.

   d. Financial Contribution and Community Engagement: Provide tangible financial benefits back to the University through efficient operations and actively participate in the academic, cultural, and social fabric of the University, including supporting initiatives like course materials or other academic scholarships to foster an inclusive educational environment.

   e. Sustainability: Operations will align with UMW Sustainability mission, goals and initiatives.

The University's goal is to customize services and products to precisely fit the needs of our diverse campus communities, ensuring that the campus store becomes a cornerstone of student life and learning at the University, with operations supporting the University's branding initiatives.

**C. General:**

1. Strategies
   Describe how your organization plans to adapt to the changing landscape of campus store retail, focusing on innovation and responsiveness to market trends. Highlight strategies to engage both the university community and the broader market, ensuring your approach aligns with evolving consumer preferences.

2. Hours of Operation
   a. The Firm shall operate the campus store on a 12-month basis, with holidays subject to the University's academic calendar, found at https://academics.umw.edu/calendar/. The University reserves the right, upon consultation with the Firm, to establish or change the service hours, plans or other methods of operation of the campus store.
   b. Propose regular operating hours for the course materials and general merchandise store(s). Describe the Firm's policy for establishing and modifying operating hours.
   c. The Firm should enhance sales by actively participating in and supporting various special campus events. The Firm shall participate in the following events, at minimum: Move-In, Welcome Week, New Student Orientation, Commencement, Grad Fair, Great Lives, Homecoming, Reunion, Open House, Sporting Events in coordination with UMW Athletics, Honors Move-In, coordinated with UMW Honors Department, and any other events that require expanded or extended hours and based upon mutual agreement.
      i. The specific events and their dates may vary and can be found on the University's website.

**D. Parking:**

1. The Firm shall provide, be responsible for and maintain any vehicles necessary for the performance of this contract. Parking arrangements, permits and fines are the responsibility of the Firm. Information about parking can be found at https://adminfinance.umw.edu/parking/

**E. Staffing:**

1. Managers
   a. Provide resumes for management candidates.
   b. The Director of Business Services or an appointee shall approve the Campus Store Manager appointed by the Firm.
   c. Any managerial changes shall require prior consultation with and approval from the University.
   d. The Firm can temporarily assign internal Managers in cases of medical or family emergencies or when searching for a new Manager, which must be communicated to the Director of Business Services or an appointee but doesn't require approval.
      i. Temporary Managers can be assigned for a period of up to six months without requiring approval. Beyond six months, continuation of their assignment must be approved by the Director of Business Services or a designated appointee.
   e. The University reserves the right to request the reassignment of any managers, including temporary ones, for reasons determined by the University.

f. Describe how management will foster positive relations with faculty, students, and departments.

2. General Staffing
    a. Outline strategies to ensure adequate staffing during peak periods, and methods to minimize checkout wait times.
    b. Provide an organization chart for each operation, indicating the minimum base crew staff, which represents the lowest staffing level.
    c. Detail incentive compensation guidelines for key personnel to motivate performance.
    d. Explain how the Firm recognizes and rewards employees for exemplary customer service.
    e. Specify the minimum qualifications required for key staff members.
    f. All employees of the Firm shall be the Firm's sole responsibility in terms of salary, benefits and taxes.
    g. All personnel shall be appropriately attired in approved uniform with a visible name tag and University issued ID (UMW EagleOne Card).
        i. Describe the staff dress code requirements.
    h. All personnel shall carry their University issued ID Card (UMW EagleOne Card) at all times while on duty.
    i. UMW EagleOne Cards are non-transferable, meaning each employee shall have their own unique identification card.
    j. The Firm, or their employees, shall pay any fees associated with acquiring or replacing these identification cards. (As of January 2025, the fee is $20.00 per card. This rate shall be subject to change.)
    k. The Firm shall notify the Contract Administrator by e-mail on the day of any employee beginning or removal from service for this Contract.
    l. The identification card (UMW EagleOne Card), UMW keys and parking decal of the departed employee shall be returned to the Contract Administrator no later than three (3) business days, or pursuant to the UMW Contract Administrator's written direction.
    m. Detail training offered to staff, including orientation and customer service.
    n. The Firm shall pay student employees at or above the Commonwealth of Virginia minimum wage.
    o. The University reserves the right to request the reassignment of any employee, including temporary ones, for reasons determined by the University.

3. Internships
   The University seeks to expand opportunities for its students to have training or paid internships. University requests that the Firm cite and describe any training and/or internship programs that the Firm currently offers or plans to offer over the course of the resulting agreement.

**F. <u>Customer Service:</u>**

1. Provide an in-depth overview of your customer service philosophy, including training programs for staff and any unique service propositions.

2. Explain the methods you will use to evaluate and ensure customer service excellence.

3. Detail how you plan to engage with campus stakeholders to understand and meet their needs, ensuring a feedback loop for continuous improvement.

4. Describe customer service capabilities and contact methods for students, faculty, and staff.

5. Include information on digital platforms for order management (in and out of store) and how these platforms enhance the customer experience. Discuss the ability for students to manage their orders online (upgrade, edit, cancel).

**G. <u>Assessment:</u>**

1. Detail your main approach to conducting customer surveys, including the methods, frequency, tools, and instruments you'll use to gauge customer preferences and satisfaction levels.

2. Firm shall commit to sharing survey results and other relevant performance metrics with UMW Business Services.

3. Describe your formal procedure for addressing complaints, emphasizing how you respond to negative feedback.

4. Outline the specific steps your firm will take to address and resolve any performance issues that may arise during the contract term.

**H. <u>Course Materials:</u>**

1. General
    a. Elaborate on your comprehensive course material services, emphasizing new, used, and rental physical and digital offerings, and including but not limited to laboratory and art supplies.

2. Describe any other student and faculty academic materials and services you offer.
    a. Discuss your approach to custom publishing and course packs.
    b. Describe how you will support the University's compliance requirement with the Higher Education Opportunity Act (HEOA) of 2008 Section 133; specifically explain your role in tracking and reporting these requirements on behalf of the University.
    c. How will you integrate registration of the semester with course materials purchases?
    d. How do faculty register course materials adoptions for their classes?
        i. Confirm that the list of adopted materials will be provided to UMW Simpson Library staff for each semester and summer term.
    e. How many publishers do you distribute and manage electronic code delivery for: McGraw, Cengage, Pearson, Elsevier, Wiley, Others?
    f. Describe your firm's sources and distribution methods for new, used and digital materials.

3. Pricing
    a. Explain your strategies for reducing financial burdens associated with course materials costs, such as rental programs, used books, digital materials, and OER.

i. Detail your comprehensive pricing strategy for new, used, rental, and digital course materials/course materials, ensuring a diverse range of affordable options for students.
ii. Explain how your pricing model aligns with the University's mission to minimize the financial burden of course materials on students, highlighting any innovative approaches to cost reduction or pricing caps to ensure affordability.
iii. Describe if your platform supports dynamic pricing and allows students to compare course materials prices across multiple vendors within a single interface, including information on the range of competitors' prices displayed. Confirm length of time within each semester and term that dynamic pricing is available for student use.
iv. Clarify the scope and criteria of your price match policy (if applicable), detailing any restrictions or conditions that apply, ensuring transparency in how students can benefit.
v. Discuss any available bundling packages that combine course materials at a reduced cost, outlining how these packages are developed and customized for specific courses or programs.
vi. Share experiences of past collaborations with academic libraries or other institutions on initiatives aimed at reducing course materials costs, such as course materials reserve programs or the adoption of open educational resources (OER) and/or low-cost materials, including outcomes and impacts of these efforts. Confirm that OER and/or low-cost materials shall be available for adoption and visible to students when materials are adopted.

4. Ordering, Buyback, Shipping, Delivery
   a. Outline your comprehensive buyback policy or program for purchasing used books from students, detailing the process, any associated costs, and pricing methodology for buyback materials to ensure transparency and fairness.
   b. Describe the available offline ordering options for students, ensuring accessibility for all, regardless of their internet access.
   c. Explain how your service adapts to meet the needs of both campus-based and remote students, highlighting any specific strategies to ensure equitable access to materials.
   d. Detail protocols for communicating with students, faculty, and staff instances of order delays, emphasizing timely and clear communication channels to manage expectations effectively.
   e. Describe the on-campus pickup options for online orders, providing convenience and flexibility for students to receive their materials.
   f. Provide a detailed account of your delivery process for online orders, including any associated costs.
   g. Explain your approach to delivering digital/electronic course materials, including integration with Canvas (UMW’s LMS), to enhance the learning experience through seamless access to resources.
      i. Confirm whether you offer Canvas integration, streamlining the process for students and faculty to access materials directly through the learning management system.

5. Faculty Adoption

a. Outline your procedure to guarantee that all course materials—whether required, recommended, or suggested—are accessible on time and in adequate quantities. Highlight how your system tracks and manages inventory to meet the course needs each semester.
b. Detail the resources and support systems in place to assist faculty and staff in the adoption process. Describe how these tools facilitate informed decisions and streamline the selection of course materials.
c. Clarify whether faculty have the capability to compare prices for course materials and other materials across various publishers and ISBNs through your service. If so, provide an explanation of how this feature is implemented and accessed.
d. Describe the analytical tools and reporting features available through your online system. Include how these capabilities can assist in adoption decisions, track material usage, and analyze spending trends over time.
    i. Confirm whether or not OER and/or low-cost materials are available for adoption. If so, describe the adoption process.
    ii. Confirm whether UMW staff would have access to the adoption portal and the ability to run reports including but not limited to adoption lists by semester and term. Confirm whether or not available reports are in real time, making the most current information available to UMW staff with access, and whether or not historical information is also available.

6. Academic, Scholarly, and Trade Books
    a. Outline the methodologies you employ to market and promote publications authored by the University's faculty, alumni, and community authors. Highlight how you plan to leverage these connections to enhance visibility and engagement within and beyond the University community.
    b. Detail the criteria and process for selecting trade books that resonate with the interests and needs of the UMW Community. Describe how you ensure a diverse and relevant selection that appeals to the academic and cultural fabric of the university.
    c. How would you define special orders and how would you accommodate these requests?
    d. Describe any other academic, scholarly, and trade book services you offer.

**I. <u>Technology:</u>**

1. Technology Standards

    The successful bidder acknowledges and agrees to the following standards regarding all software or technology solutions that interact with UMW Data:
    a. CIO Review & Approval: Any software or technology solution that uses, stores, or interacts with UMW data must undergo and pass a review by UMW's CIO before implementation. The bidder shall submit all necessary documentation, including impact assessments and data classification details, for the CIO's evaluation.
    b. Compliance: No technology solution shall be deployed without explicit written approval from UMW's CIO, ensuring adherence to UMW's security, accessibility, and operational standards.
    c. Documentation:
        i. A current VPAT (Voluntary Product Accessibility Template) should be included with the RFP response to verify compliance with accessibility standards.

ii. The Vendor's own SOC 2 Type II report by an independent third-party auditor to ensure service providers securely protect the data and interests of the institution, not the hosting provider, such as AWS or Azure, etc.

2. Innovation
   a. Detail your dedication to the continuous investment in new technologies and the development of innovative products and services. Explain how you proactively anticipate and adapt to market changes to meet the evolving needs of the academic community.

3. Website/Online Presence
   a. Describe the functionalities and user experience offered by the UMW Campus Store's website. Specify the following capabilities:
      i. Customization: The ability to embed tailored messages and create personalized web pages for sports teams (Athletics), student organizations, and other campus groups and track sales specific to each personalized website.
      ii. Inventory Management: Real-time advisement on stock availability to keep users informed.
      iii. Order Processing: Display of estimated delivery times, comprehensive customer support details, and prompt order acknowledgments.

4. Point of Sale (POS) System Requirements
   The Firm shall ensure that all Point of Sale (POS) systems meet UMW's security and operational requirements by adhering to the following conditions:
   a. Payment Processing
      i. The Firm must contract with a payment processing entity of its choosing to process customer payments. This process must comply with UMW's security standards.
      ii. Required documents include the most recent AOC (Attestation of Compliance) and HTSA (High-Level Threat Security Assessment), both included in the RFP response.
   b. Equipment & Network Responsibility
      i. The Firm is responsible for providing all POS equipment necessary for sales and services, both online and in physical locations.
      ii. The Firm must provide its own network connection for POS operations.
   c. Security Compliance
      i. The Firm must ensure that its payment processing entity and other business partners undergo regular data security assessments.
      ii. An Attestation of Compliance must be provided to UMW annually or upon request by UMW's CIO.
   d. Merchant Identification
      i. The Firm must use its own merchant identification number(s) when processing payments at physical and online campus store locations.
   e. Business Partner Standards
      i. The Firm must ensure that all business partners use industry-standard and up-to-date security tools and technologies, such as anti-virus protections and intrusion detection methods. The Firm's business partners must meet or exceed the Firm's own standards for handling sensitive data.


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adminfinance.umw.edu/procurement

5. Innovation and Adaptability

   The Firm must demonstrate its commitment to innovation and continuous investment in new technologies by addressing the following:

   a. Technology Investment

      i. The Firm should detail its dedication to the development of new products and services that meet the needs of UMW and the academic community. This includes anticipating and adapting to market changes and technological advances.

   b. Innovation Strategy

      i. Provide an explanation of how the Firm proactively develops technology solutions to align with the evolving needs of the academic sector.

**J. <u>Payment Options:</u>**

List the payment options that your firm offers both in-store and online. Required tenders for a physical and/or an online store include but are not limited to credit card, Financial Aid, Departmental Charges, UMW EagleOne Card, and Gift cards.

1. Refunds

   a. Propose a refund policy for each business segment.

2. Promotional Offers: The Firm should promptly extend any special educational or promotional discounts to the University, including the duration of such offers.

**K. <u>General Merchandise:</u>**

1. The University is looking for a Firm that can offer a selection of "soft goods" such as, but not limited to office and art supplies, University emblematic apparel and memorabilia, and such other related goods. Provide examples of "soft goods" proposed for UMW's general merchandise store.

2. The Firm shall only purchase emblematic goods bearing the University name, marks, and logos from licensed vendors. The Firm's vendors shall have approval from the University through its Licensing Office before using the University marks on merchandise. The University will grant the Firm the right to sell approved University licensed products; however, the right is not exclusive and is subject to the payment by licensed vendors of established license fees.

   a. Describe how your Firm will work with UMW Licensing to establish and maintain a workflow to ensure all products bearing the University name, marks and logos have been approved prior to being placed on the sales floor or website for resale.

3. Outline your overarching philosophy regarding merchandising and explain how this philosophy influences the choice of merchandise, ensuring it meets the university community's needs and expectations.

   a. Detail how your merchandising approach affects pricing, with a focus on making items affordable for the university community while maintaining quality.
   b. Include any market research efforts and how you work with the University to determine new purchases or phase out expired merchandise.
   c. Define what affordable would look like as it relates to both men's and women's apparel and the percentage of affordable items you would propose having in the store/website.
   d. Describe any measures in place to balance quality with cost-effectiveness.

e. How will you ensure that your merchandise prices are competitive in the local area?
    i. The University desires a market basket comparison for pricing comparison on mutually agreed upon selected items with nearby competitors at least once a year.

4. What school spirit and emblematic merchandise do you typically offer?
    a. Clarify the process for choosing merchandise to be offered, particularly school spirit and emblematic items.
    b. Explain how brands are selected, ensuring they align with the university's values and appeal.

5. The University shall have the right to recommend merchandise to be sold in the Campus Store and to request the removal of merchandise for sale in the Campus Store which the University considers offensive, inappropriate, or an inadequate representation of the UMW brand.

6. Special and One-Time Event Merchandise Collaboration: The University is interested in introducing special, one-time merchandise for occasional events and seeks to understand your experience and approach in facilitating such collaborations.
    a. Please describe your capacity and willingness to work with the University in creating unique, one-time merchandise for special events. Highlight how you accommodate these distinctive requests while ensuring timely delivery and quality. List all qualifying circumstances, such as order minimums.
    b. Share examples of how you have successfully collaborated with other universities to design and deliver special or one-time event merchandise.

7. The University desires flexibility to utilize local vendors for production of UMW emblematic merchandise. The University also desires to collaborate with local retail outlets to promote University gear in the stores. Please describe your capacity and willingness to work with the University in partnering with local vendors.

8. Describe how your Firm would approach limited release merchandise, and provide examples of instances where your firm maintains such merchandise.

9. Describe other general products you will offer in each store.

**L. <u>Athletic Merchandise:</u>**

1. Describe your Firm's ability to sell quality UMW Athletic merchandise in the physical and/or online store/platform, ensuring all sports are represented at all times, and that Athletic merchandise accurately reflects the style, branding and logos used by the UMW Athletic Department. Describe the Firm's ability to coordinate with the University's Athletic and other departments to jointly market and sell soft goods, if requested by the University department(s).

2. Please describe the Firm's experience with Name, Image, and Likeness (NIL) regulations and initiatives. This should include specific examples of how they have supported university athletic departments in managing NIL compliance, opportunities, and challenges. The bidder should also outline their approach to assisting UMW's Athletic Department in optimizing NIL opportunities for student-athletes, ensuring compliance with NCAA regulations, and integrating NIL strategies into the broader athletic and academic programs.

3. Describe how your firm would collaborate with Athletics to execute team fundraising initiatives through online UMW Athletic apparel sales.

**M. Graduation Regalia:**

1. The sale of class rings, jewelry, announcements and academic regalia shall be subject to the terms and conditions of UMW's separate agreements. However, the campus store firm shall support the graduation activity as requested. In the case of a physical general merchandise store, this shall include the sale of graduation regalia by the campus store and may include allowing the sale of other graduation items in the campus store space and providing sales and storage space as requested. Responsibilities also include, but are not limited to organizing and facilitating Grad Fair events, and providing a seamless experience for graduates.

**N. Marketing, Advertising and Promotions:**

1. Detail the marketing, advertising, and promotional strategies you plan to implement to effectively reach and engage students, faculty, staff, and other university community members. Describe how these strategies will be tailored to the unique needs and interests of the university constituent. Note that UMW broadcast communications are not utilized for marketing purposes.

2. Provide an overview of the types of events your Firm typically organizes throughout the academic year. Highlight how these events contribute to the campus community and foster engagement with the campus store.

3. Discuss the methods you will use to enhance the campus store's visibility and ensure it becomes an integral part of campus life. Include plans for collaboration with various campus entities and participation in campus activities.

4. Detail how you plan to partner with University Athletics, Alumni Association, Student Government Association, Admissions, and other campus organizations to ensure the Campus Store has a presence at university events and effectively markets its merchandise.

5. Share specific strategies designed to attract students, families and alumni on your website and/or physical store locations. Emphasize how these strategies will enhance the shopping experience and meet the needs of the university community.

6. Pop Up Events: Firm should be prepared to have a presence at Pop Up Events identified by University to promote the University's mission and to support specified events.
   a. Pop-up locations should also be included in the Firm's retail strategy for Admissions, Alumni and Athletic events.

7. Please describe your Firm's ability to provide students, families and visitors an online, on demand retail offering for UMW Athletics.

**O. Facilities and Equipment:**

1. The University envisions a physical Campus Store not only as a retail space but as a vibrant destination and central hub of activity for students, faculty, staff, prospective students and their families and the broader community. Proposers are encouraged to creatively consider the use and configuration of the available space to maximize its location, making it an inviting and dynamic area for all.

2. Renovation Plan and Budget: If proposing a physical store, include recommendations and cost for a refresh. Proposals should reflect a reduced retail space, providing room for complementary student services. Proposers should present a detailed plan and budget for renovating or updating the campus store throughout the contract duration. Include a timeline for renovations to ensure the campus store remains contemporary and well-maintained, avoiding any dated appearance.

3. The Firm shall be responsible for the proper collection and removal/disposal of all trash, garbage, shipping containers, boxes, skids, etc., from the interior of the campus store facility and deposited in the appropriate disposal container, e.g. trash/garbage in dumpsters, cardboard flattened and deposited in cardboard recycling containers, etc.

4. Floor Maintenance: The Firm shall be responsible for cleaning all flooring at least bi-annually, ensuring floors where applicable have an attractive waxed finish. Carpets must also be clean and in good repair.

5. Cleanliness of Surfaces: Walls, ceilings, windows, and vents shall be kept clean, free of dirt, dust, and grease. Display and entrance windows and doors shall be cleaned by the Firm.

6. Comprehensive Cleaning Schedule: The Firm shall perform thorough cleaning of all facilities at the end of each semester, including the summer, and during University scheduled breaks. This includes walls, fixtures, furniture, hallways, stairs, the receiving dock, offices, rugs, storage rooms, and equipment.

7. Loading Dock: The loading dock area shall be maintained clean and free from debris at all times.

**P. Financials:**

1. Financial Terms
    a. Sales and Commission Payment Structure: Firm shall present a detailed Sales and Commission payment tier matrix applicable throughout the contract, including any renewals or extensions, to outline the basis for commission payments. Matrix must include, at minimum, sales category, sales volume per category and/or in total, % commission and total commission per category.
    b. Payment Schedule: The agreed-upon Sales and Commission payment tier schedule shall serve as the standard methodology for calculating and executing timely commission payments to the university.
    c. Reporting and Payment Deadlines: All financial and sales reports, alongside corresponding commission payments, shall be submitted by the 10th day of the month following the reporting period. In cases of late submission, the university reserves the right to impose a late fee up to $100 per day. If the due date falls on a weekend or public holiday, the deadline extends to the next business day. Financial and sales reports submitted shall be final and not preliminary or estimated.

d. Fiscal Year Definition: The University's fiscal year is defined from July 1 to June 30, with financial reporting conducted on a monthly basis. Any contract period beginning before the start of a full fiscal year shall be adjusted on a prorated basis.
e. Fiscal Reporting Alignment: The Firm's fiscal reporting period shall align with the University's fiscal year. Monthly reporting shall cover data from the first to the last day of each calendar month.
f. Tax Obligations: The Firm is solely responsible for all tax obligations related to this contract.
g. Sales and Tax Reports: Upon request, the Firm must provide copies of all required sales and tax reports that detail sales, revenues, and taxes generated at the University.
h. Operating Costs: The Firm shall pay all operating costs for providing the contracted goods/services, except for specific costs outlined by the University (University's Responsibilities) in the RFP or the negotiated contract.
    i. The University's Responsibilities consist of:
        a. Electricity
        b. General building maintenance (HVAC, Mechanical, Ceiling tiles from leaks, etc.)
        c. Heating and air conditioning
        d. Smoke/heat alarms
        e. Natural gas, steam
        f. Water, sewer
        g. Trash removal (from the University's designated point)
        h. Fire safety inspections
        i. Utility Services: The University commits to maintaining utilities to its best ability but shall not be liable for losses due to outages.

2. Sales, Reporting and Commission Terms
    a. Net Sales Reporting: All net sales (gross sales minus taxes), including but not limited to cash, check, internal transfers, gift card redemption and debit/credit card, and financial aid shall be recorded as revenues on financial reports at retail values.
    b. Commission Computation: Commissions shall be computed on net sales.
    c. Commission Payments: Commissions shall be paid to the University in the period they were earned and charged, and not upon collection date. The Firm shall not be reimbursed for commissions paid on uncollected amounts. Uncollectable amounts shall be the responsibility of the Firm.
    d. Commission Payments shall be accompanied by sales reports showing net sales for each category, total sales, period in which sales were made, and commission calculation.
    e. Monthly Financial Reporting: The Firm shall e-mail a monthly financial operating statement report (Operating Statement) in spreadsheet format to the University by the 10th of each calendar month. Proposal must include a sample Profit and Loss statement that would be provided to the Contract Administrator.
    f. Any operating statements requiring adjustments because of a review audit shall be reflected on the next reporting month.
    g. At the end of each semester or term, or upon request of the UMW Contract Administrator, Contractor shall provide:
        i. Average pricing for each available course materials format

ii. A current term course materials list that includes the retail price for each title in each of its available formats.

h. Contractor shall provide insights reports annually to the Contract Administrator.
i. Audit Reporting: The University should be informed by the Firm of the schedule of the Firm's audit of the records and operations at the University. The University will have the option to participate in the Firm's audits and shall receive a full audit report of findings regardless of the University participation.
j. Confidentiality and Compliance: All Firm financial reports and their content will be retained, used and treated in strict confidence by the University except as required by the Virginia Freedom of Information Act.

3. The Firm shall submit all reports and payments to:
   a. Reports
      i. Electronic reporting submission addresses will be determined upon contract award.
   b. Payments
      i. Electronic payment submission will be provided upon contract award. Electronic payments must be accompanied by supporting documentation that defines the sales by category, sales period, total sales and calculation of funds earned.

**Q. Renovation and Construction:**

1. Coordination with University Facilities: The Firm shall coordinate with the University's Facilities Management, through Business Services, for support related to electrical work, construction, lighting, plumbing, and the installation of furniture/fixtures, finishes, inspections, and signage for any proposed changes to the retail space.

2. Design and Construction Capabilities: State whether the Firm is capable of facilitating the design, renovation, and/or construction processes upon request and possess in-house resources to fulfill these needs throughout the contract term.

3. Regulatory Compliance: The Firm shall only utilize firms registered with the Department of Professional and Occupational Regulation (www.dpor.virginia.gov/).

**R. Contract Transition:**

The University currently has a contract in place for its campus store management. This contract with Barnes & Noble will expire on June 30, 2026. In the event of a new vendor being selected as the campus store vendor, it will be expected that the two parties work collaboratively on a possible early transition.

1. Provide a realistic implementation and transition plan. The schedule should include target dates for staffing, stocking, equipping, all specific roles and responsibilities required for the transition and merchandising the retail facilities, and a detailed project plan for necessary IT integrations. In addition, provide dates for key transition activities such as staff training, system installation, banking arrangements, service agreements, phone installations, etc.

2. In the event of a transition to a new campus store vendor, the successful bidder should make employment offers to the current campus store staff where applicable. The bidder should outline their strategy for

evaluating and integrating the current staff into their operations to maintain continuity and leverage the staff's experience and knowledge.

**S. Experience and Qualifications of Firm:**

1. Provide a list of four (4) comparable academic institutions or other facilities for which similar goods and services are currently being provided. Include names, addresses, e-mail and phone numbers of the appropriate contact person.

2. State the Firm's capability for enhancing the University's retail program, by identifying the goals and strategies implemented at one site of a similar size and nature to University of Mary Washington.

3. Provide a list of all clients lost within the last three years. Include a contact name and telephone number, the length of service at the account, the reason for the loss. Include clients lost as a result of merger or acquisition.

4. Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: https://vascupp.org/members

5. Submit a copy of the company's most recent annual report, most recent filing of Securities and Exchange (SEC) reports (10Q and 10K) and any other written evidence of the company's financial stability. If SEC reports are not filed, include litigation record for prior, current and pending matters in addition to Financial Statements/Balance Sheets for the past two years of operation. Similar data is requested for subcontractors, if applicable.

**T. Other Related Goods/Services:**

1. Describe other related goods and/or services provided by your firm. Provide information to demonstrate how these goods and/or services could benefit the University and include the associated pricing for the term of the contract. Provide information to address how newly introduced products and services would be offered and included in the contract. Include information on your ability to provide most favored nations pricing.

**U. Sustainability:**

1. Operations will align with UMW Sustainability mission, goals and initiatives.

2. Describe how you will establish waste reduction and diversion targets, focusing on single-use plastics and other disposables. Please provide information to demonstrate the overall environmental impact of your proposed approach. Include information on your recommendations to reduce the environmental impact and create efficiencies.

**V. Exclusive Beverage Agreement:**

The University maintains the right to have exclusive agreements. The Firm shall comply with all the agreement's terms and conditions. Currently, the University has an exclusive agreement with Pepsi Bottling Group, LLC. for carbonated and non-carbonated soft drinks; fountain tea; bottled teas, coffees, juices, Isotonic beverages and bottled water. Firm Beverages will be the only beverages sold, distributed, sampled or otherwise made available on the Campus. The following beverages are exempt from exclusivity; (1) non-


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bottled tap water/filtered water stations, hot chocolate, freshly brewed coffee and tea, fresh squeezed juices, and milk; (2) other beverage products used in a proprietary recipe by restaurants on campus (ingredient(s) from an alternative source will not be advertised). In no event will exempted beverages be advertised on campus.

## VIII. CONTRACT ADMINISTRATION:

A. The Director of Business Services or designee, shall be identified by the University as the Contract Administrator and shall use all powers under the contract to enforce its faithfulness and performance in conjunction with the University's Procurement Services department.

B. The Contract Administrator shall determine the amount, quantity, acceptability, fitness of all aspects of the goods/services and shall decide all other questions in connection with the goods/services. The Contract Administrator shall not have authority to approve changes in the goods/services which alter the concept or which call for an extension of the contract term. Any modifications made to the contract must be authorized by the University's Procurement Services Department through a written two-party modification to the contract.

## IX. EVALUATION AND AWARD CRITERIA:

Evaluation Criteria - Proposals shall be evaluated by the University of Mary Washington Evaluation Committee using the following criteria:

| Criteria | Point Value |
|---|---|
| Methodology / Approach | 20 |
| Value: Customer Service, Cost to Students | 20 |
| Suitability of Offerings for intended purpose | 15 |
| Financial Proposal | 15 |
| Innovation / Technology / Accessibility | 15 |
| Qualifications / Experience | 10 |
| SWaM Status / Utilization | 5 |
| Total | 100 |

## X. PROCUREMENT SCHEDULE:

Below is a brief schedule for this solicitation, specifying the critical dates and milestones (subject to change).

| Event/Milestone | Date/Date Range |
|---|---|
| Issue Date of RFP | 2/7/2025 |
| Optional Pre-Proposal Conference | 2/18/2025 |
| Questions Due | 2/25/2025 |
| Proposal Due Date | 3/10/2025 |
| Initial Scoring Meeting | 3/24/2025 – 3/28/2025 |
| Negotiations | 4/7/2025 – 4/11/2025 |
| Contract Negotiations | 4/14/2025 – 4/18/2025 |
| Final Scoring Meeting | 4/21/2025 – 4/25/2025 |
| Anticipated Contract Award | 4/30/2025 |

## XI. GENERAL TERMS AND CONDITIONS:

Please refer to the link to follow regarding Required General Terms and Conditions of this Solicitation which are a mandatory part of the resulting contract: https://adminfinance.umw.edu/procurement/umw-terms-conditions/

## XII. SPECIAL TERMS AND CONDITIONS:

1. **ACCEPTANCE PERIOD:** Any proposal in response to this solicitation shall be valid for ninety (90) days. At the end of the ninety (90) days the proposal may be withdrawn at the written request of the Contractor. If the proposal is not withdrawn within 10 calendar days at the end of the stated Acceptance Period, the proposal shall remain in effect, as-is, until an award is made, or the solicitation is canceled. If the proposal specifies an alternative acceptance period than the one written here, the acceptance period shall be the longer of the two dates.

2. **ACCESSIBILITY:** All e-learning and information technology developed, purchased, upgraded or renewed by or for the use of University of Mary Washington shall comply with all applicable University policies, Federal and State laws and regulations including but not limited to Section 508 of the Rehabilitation Act (29 U.S.C. 794d), the Information Technology Access Act, §§2.2-3500 through 2.2-3504 of the Code of Virginia, as amended, and all other regulations promulgated under Title II of The Americans with Disabilities Act which are applicable to all benefits, services, programs, and activities provided by or on behalf of the University. The Contractor shall also comply with the most current version of the Web Content Accessibility Guidelines (WCAG). The Vendor/Contractor further warrants that it is committed, and shall remain committed, to promoting and improving accessibility of all its products as specified in UMW's IT Accessibility Policy. https://technology.umw.edu/technology-accessibility/
   A. If the Products and Services are not in conformance with all applicable federal and state disability laws, policies, and regulations as of the Contract Effective Date, as identified by the Vendor/Contractor, or through University testing or assessment, Vendor/Contractor shall use all reasonable efforts to update the Products and Services so as to be in conformance prior to Acceptance by the University.
   B. In the event any issues arise regarding Vendor's/Contractor's compliance with applicable federal or state disability laws, policies and regulations, at any time, during any term of the contract, including all optional renewals, the University may send communications to Vendor/Contractor as specified in the Notices provision of the contract, requesting cure of such noncompliance. The Vendor/Contractor shall respond to these communications within two (2) business days from receipt to the University official identified in the Notices provision of the contract, with a plan, including a timeline for completion, which will bring the contractor back within compliance as required by the contract. This plan shall require University agreement.

3. **ADDITIONAL (FUTURE) GOODS & SERVICES:** The University reserves the right to request from the contractor to provide additional Goods and/or Services under similar and market-based pricing, terms, and conditions, and to make modifications or enhancements to existing services. Additional Goods and Services may include other products, components, accessories, subsystems or related services that are newly introduced during the term of the Agreement. Newly introduced additional Services will be provided to the University at favored nations pricing, terms, and conditions.

4. **ANNOUNCEMENT OF AWARD:** Upon the award or the announcement of the decision to award a contract resulting from a competitive solicitation process for any dollar value, or sole source procurement, the

University will publicly post such notice on the DGS/DPS eVA VBO (www.eva.virginia.gov) for a minimum of ten (10) days.

5. **ANTITRUST:** By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.

6. **AWARD – RFP:** 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 need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror(s) which, in its opinion, has offered the best overall combination of quality, price and various elements of required goods/services, as stated in the solicitation, which in total are optimal relative to the agency's need, and shall award the contract to that offeror(s). The University may cancel this Request for Proposal, reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous (Governing Rule §16). 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, or if in the sole opinion of the University it is in the University's best interest to award to only one offeror, 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. The University, in its sole opinion, reserves the right, if determined to be in the best interest of the University, to make:
   - a separate award of each item,
   - an award of a group of items,
   - an award either in whole or in part,
   - a single award, or
   - a multiple award

7. **BEST and FINAL OFFER (BAFO):** At the conclusion of negotiations, the Offeror(s) may be asked to submit in writing, a Best and Final Offer (BAFO). After the BAFO is submitted, no further negotiations shall be conducted with the Offeror(s). The Offeror's proposal will be rescored to combine and include the information contained in the BAFO. The decision to award will be based on the final evaluation including the BAFO."

8. **BULK DELIVERIES:** To avoid single item deliveries, the University and Contactor shall work together to ensure bulk shipments are utilized to the maximum extent possible.

9. **CANCELLATION OF CONTRACT**: The University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon sixty (60) days' written notice to the Contractor. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform all outstanding orders issued prior to the effective date of cancellation. The Contractor shall be entitled to

receive full compensation for all University-accepted services performed and/or goods received prior to the effective date of contract termination. Contractor shall not be entitled to, and hereby waives claims for lost profits and all other damages and expenses.

10. **CHANGES TO THE CONTRACT**: Changes can be made to the contract by written mutual agreement to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.

11. **CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION:** The contractor assures that information and data obtained as to personal facts and circumstances related to faculty, staff, students or others will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the University's written consent and only in accordance with federal law or the 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 agency 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.

12. **CONTINUITY OF SERVICES:**
    1. 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:
       - i. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
       - ii. 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
       - iii. That the University Contracting Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.
    2. The Contractor shall, upon written notice from the Contract Officer, 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.
    3. 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.

13. **CONTRACTOR AND EMPLOYEE REQUIREMENTS – BONDING AND INSURANCE:** Contractor Personnel may have access to sensitive Personally Identifiable Information (PII). The Contractor shall ensure that all contractor personnel given access to, or sent to work on properties of the University of Mary Washington are bonded and insured; copies of which must be provided to the University prior to the first day of work.

a. If the Contractor, under this contract, creates, obtains, transmits, uses, maintains, processes or disposes of the subset of University Data known as Personally Identifiable Information (PII), or financial or business data, the Contractor shall also perform the following background checks on all employees who have potential to access such data in accordance with the Fair Credit Reporting Act:
   i. Office of Foreign Assets Control List (OFAC) check
   ii. Bureau of Industry and Security List (BIS) check
   iii. Office of Defense Trade Controls Debarred Persons List (DDTC)

14. **CONTRACTOR EMPLOYEE REQUIREMENTS – BACKGROUND SCREENS:** The Contractor shall ensure that its employees have undergone background screening and possess all necessary qualifications to comply with the terms of this contract, including, but not limited to all terms related to data and intellectual property protection and physical protection and safety of students, faculty and staff. To this end, all contractor staff considered for full-time or part-time employment on any property owned, leased or otherwise acquired by UMW, shall undergo a background screening, the cost of which shall be incurred by the Contractor, after an offer has been extended, and prior to commencement of work on any UMW property. If Contractor employs the use of a staffing company to provide seasonal or temporary labor at any point during any term of the contract, including optional renewals, background screening shall be performed by the Subcontractor to the same extent as for any full-time or part-time Contractor staff.
   a. The results of background checks shall be directed solely to the Contractor, including any criminal convictions. Consideration shall be given to the relationship to the job, how long ago the conviction occurred, the potential risk posed to employees, customers, campus and Contractor, and any other circumstances deemed relevant to the final determination of whether to employ or retain the employee. Conviction information shall be maintained as confidential to the Contractor. If a conviction is found to be relevant to the role and the decision is made not to proceed, the Adverse Action Process shall be commenced, in accordance with the Fair Credit Reporting Act.
   b. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, UMW reserves the right to approve or disapprove any contract employee that will work on UMW property. Such request shall be in writing and state the reason. Such reason must be for good cause and may not be for an illegal reason. Disapproval by the University will solely apply to that individual's employment on UMW property and should have no bearing on the Contractor's employment of any individual outside of UMW properties.
   c. UMW reserves the right to audit a Contractor's background check process at any time.
   d. All Contractor employees shall have a duty to self-disclose any criminal conviction(s) occurring while assigned to the UMW campus. Such disclosure shall be made to the Contractor.
   e. Screens shall include:
      i. Enhanced Nationwide Criminal Search; which shall include Social Security Number search, address history, legal name and alias, including for job-related criminal history
      ii. DOJ Sex Offender Search and individual evaluation of results
      iii. County Criminal Search for all identified counties

15. **CONTROLLING VERSION:** The PDF version of the solicitation and any addenda issued by University of Mary Washington Procurement Services is the mandatory controlling version of the document. Any modification and/or additions to the solicitation by the Offeror shall not modify the official version of the solicitation issued by UMW Procurement Services unless accepted in writing by the University. Such modifications or

additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, UMW reserves the right to decide on a case-by-case basis, in its sole discretion, whether to reject such a proposal. If the modifications or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form (PDF) issued by UMW Procurement Services.

16. **COOPERATIVE PROCUREMENT/ADDITIONAL USERS - USE OF AGREEMENT BY THIRD PARTIES:** 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 https://vascupp.org/sites/vascupp/files/2022-08/Governing%20Rules_with_foreword_final_August%202022.pdf). This RFP is being issued by the University on behalf of the Virginia Higher Education Procurement Consortium ("VHEPC"), which includes all members from the Virginia Association of State College and University Purchasing Professionals ("VASCUPP"). Reference the VASCUPP Zone Map in Attachment E. It is the intent of this RFP and resulting contract to allow for cooperative procurement. Accordingly, this may include any and all state, local governments, school districts, public body, public or private health or higher education institutions or the University's affiliated foundations in the United States may access any resulting contract if authorized by the Contractor.

    Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor, the resultant contract may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. The Contractor will notify the University in writing of any such entities accessing the contract. No modification of this contract or execution of a separate contract is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

    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 to include contractual disputes, invoicing and payments without direct administration from the University.

    UMW 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 UMW 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. Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.
    Use of this contract does not preclude any participating entity from using other contracts or competitive processes if need be. The Contractor is strongly encouraged to offer additional discounts to all contract participants as the result of increasing aggregated spending among all entities accessing the contract. A plan for extending deeper discounts among all contract participants will be requested during negotiations.

17. **DEBARMENT STATUS:** By participating in this procurement, the vendor certifies that they are not currently debarred by the Commonwealth of Virginia or any affiliated agency from submitting a response for the

type of goods and/or services covered by this solicitation. Vendor further certifies that they are not debarred from filling any order or accepting any resulting order, or that they are an agent of any person or entity that is currently debarred by the Commonwealth of Virginia. If a vendor is created or used for the purpose of circumventing a debarment decision against another vendor, the non-debarred vendor will be debarred for the same time period as the debarred vendor.

18. **DEFAULT:** In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.

19. **DELIVERY AND STORAGE:** It shall be the responsibility of the contractor to make all arrangements for delivery, unloading, receiving and storing materials in the building during installation. The owner will not assume any responsibility for receiving these shipments. Contractor shall check with the owner and make necessary arrangements for security and storage space in the building during installation.

20. **DELIVERY VEHICLE IDLING:** While waiting to advance toward the UMW loading dock to unload payloads, the driver should make every effort to minimize the idling time of the vehicle without risk of damage to temperature-controlled cargo.

21. **DISCRIMINATION, DISPARATE TREATMENT or HOSTILE WORK ENVIRONMENT:** The University of Mary Washington, an agency of the Commonwealth of Virginia, strictly forbids harassment of any employee, applicant for employment, vendor, contractor or volunteer in the workplace, on the basis of any protected groups, classes or other categories to which they belong or are perceived to belong. These protected categories include race, ethnicity, national origin, age, pregnancy, disability, religion, veterans, gender, gender expression, or sexual orientation/identification. The Commonwealth will not tolerate any form of retaliation directed against an employee or third party who either complains about harassment or who participates in any investigation concerning harassment. https://www.dhrm.virginia.gov/docs/default-source/hrpolicy/policyguides/soc-policy-1-60-attachment-a-offenses.pdf Pursuant to the authority provided in Chapter 10 and 12, Title 2.2 of the Code of Virginia.

22. **DRUG-FREE WORKPLACE:** During the performance of this contract, the contractor agrees to (i) provide a drug free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over $10,000, so that the provisions will be binding upon each subcontractor or vendor.

    For the purposes of this section, "*drug-free workplace*" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance during the performance of the contract.

23. **ECOLABELS AND STANDARDS:** The U.S. Environmental Protection Agency (EPA) has established recommended specifications, standards, and Ecolabels to assist with the identification and procurement of environmentally sustainable products and services. The Contractor is strongly encouraged to utilize these recommendations when purchasing materials, parts, and products in support of this Contract. The recommendations are found on the EPA site. The various Ecolabels, as identified by the EPA, are provided below:

24. **ELECTRONIC DOCUMENTATION & COMMUNICATION:** When appropriate, the delivery of all documents in support of this Contract should be made by electronic means. Acceptable methods include the affixing of a file(s) to an email; uploading documents to SharePoint or other site as designated by the University; or transmitted via a thumb drive. Proprietary or personally identifiable information shall be encrypted. During meetings or presentations, the distribution of hard copy documents to the participants is prohibited.

25. **ELECTRONIC WASTE DISPOSAL:** Disposal of electronic waste incurred in support of this Contract should be through a certified E-Waste Recycler.

26. **EMERGENCY RESPONSE NOTIFICATION:** In the event of a local, state, or national emergency, the Contractor shall submit to the University its current updated emergency policies and/or procedures if any personnel are to be performing work on University grounds. In addition to any specific guidelines established by the University for any current or ongoing emergency, all guidelines established by the Commonwealth of Virginia, OSHA, the CDC and any other regulatory agency shall be followed. *It is the responsibility of the Contractor to remain updated regarding any current University emergency policies and procedures*.

27. **ENVIROMENTALLY FRIENDLY PACKAGING:** Items shipped in support of this Contract should consist of the minimal amount of packing material necessary to protect the item(s) during shipment. As appropriate, packaging materials should consist of biodegradable materials.

28. **EQUIPMENT ENVIRONMENT:** Environmental specifications for any equipment to be delivered under the resulting contract shall be furnished in writing along with the Offeror's proposal, should any such

requirements be applicable. These specifications must be in sufficient detail to permit all installed equipment to function efficiently from an environmental perspective. *Unless otherwise stated in the solicitation, it will be the University's responsibility to prepare the site at its own expense to meet the environmental specifications provided.*

29. **E-VERIFY PROGRAM: EFFECTIVE 12/1/2013:** Pursuant to the *Code of Virginia, §2.2-4308.2*., any employer with more than an average of fifty (50) employees for the previous twelve (12) months entering into a contract in excess of $50,000 with any agency of the Commonwealth to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to such public contract. Any such employer who fails to comply with these provisions shall be debarred from contracting with any agency of the Commonwealth for a period up to one year. Such debarment shall cease upon the employer's registration and participation in the E-Verify program. If requested, the employer shall present a copy of their Maintain Company page from E-Verify to prove that they are enrolled in E-Verify.

30. **EXTRA CHARGES PROHIBITED:** The bid or proposal price shall be complete; and shall include all applicable freight and any other charges; extra charges invoked by the Contractor shall not be honored or paid. These charges, for example, shall include but not be limited to fees invoked by the Contractor for the use of a University charge card for payment of invoices, or any order-associated eVA fees.

31. **FAIR EMPLOYMENT CONTRACTING ACT:** In accordance with **§ 2.2-4200 and § 2.2-4201,** during the performance of this contract the contractor agrees to remain in compliance with the Fair Employment Contracting Act.

32. **FISCAL YEAR PROCESSING:** The University of Mary Washington fiscal year is July 1st through June 30th. Payment cannot be made for multiple fiscal years in advance of services.

33. **FOREST STEWARDSHIP COUNCIL CERTIFIED (FSC) PAPER:** Contractor should utilize paper that is FSC certified when there is a requirement to provide hard copy documents. FSC certified paper will display the logo below:

34. **FRATERNIZATION:** Any behavior by any contractor employee that is determined to be inappropriate by the Contract Administrator may be cause for request for removal of the contractor's employee from University property, at minimum, and/or result in contract termination.

35. **IDENTIFICATION OF BID/PROPOSAL ENVELOPE:** The signed bid/proposal must be submitted in a separate sealed envelope or package. The envelope or package should be addressed as directed on Page 1 of the solicitation. If not hand-delivered, the bidder/offeror takes the risk that the envelope, even if marked as described below, may be inadvertently opened and the information compromised which may cause the

bid/proposal to be disqualified. Bids/Proposals may be hand-delivered to the address listed on Page 1 of the solicitation. No other correspondence or bids/proposals should be placed in the envelope.

| Name of Offeror | | Proposal Due Date & Time |
|---|---|---|
| UMW RFP Number | | UMW RFP Title |
| Street #/Name or P.O. Box # | | City, State and Zip Code |

36. **INDEMNIFICATION:** Contractor agrees to indemnify, defend and hold harmless the University as an agency of 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 using agency to use the materials, goods, services, or equipment in the manner already and permanently described by the contractor on the materials, goods, services or equipment delivered.

37. **INDEPENDENT CONTRACTOR RELATIONSHIP:** In performing any and all of the services to be provided under this contract, the Contractor shall at all times and for all purposes be and remain an independent contractor. In no case and under no circumstances shall the Contractor or any of its employees, including but not limited to those of its employees actually performing any of the services, have authority to make any representations or commitments on behalf of the University or be considered the agent of the University for any purpose whatsoever. No persons engaged by the Contractor in connection with the provision of Services shall be considered employees of the University. As between the parties, the Contractor shall be responsible for hiring, supervising, training and instructing those individuals performing the services and shall pay any required state and federal taxes on behalf of such persons and provide them with any legally required employee benefits.

38. **INSPECTION:** All work and materials in each project shall be subject to final inspection by an authorized representative identified by the University. Any omission or failure on the part of such representative to disapprove or reject inferior work or defective work or materials shall not be construed to be an acceptance of any such work or material. If any defective work or materials are found during inspection, the Contractor shall remove or repair, at his own expense, such defective work or rejected material and shall correct and/or replace same without extra charge.

39. **INSPECTION OF JOB SITE:** My signature on this solicitation constitutes certification that I have inspected the job site and am aware of the conditions under which the work must be accomplished. Claims, as a result of failure to inspect the job site, will not be considered by the University.

40. **INSTALLATION:** All items must be assembled and set in place, ready for University use. All crating and other debris must be removed by the contractor from the premises.

41. **INSURANCE:** By signing and submitting a bid or proposal under this solicitation, the bidder or offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract

is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with §25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et seq. of the Code of Virginia. The bidder or offeror further certifies that the contractor and any subcontractors will maintain these insurance coverages during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

Workers' Compensation - Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirements under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.

Employer's Liability - $100,000.

Commercial General Liability - $1,000,000 per occurrence and $2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.

Automobile Liability - $1,000,000 combined single limit. Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third- party owner of such motor vehicle).

PROFESSION/SERVICE LIMITS

| | |
|---|---|
| Accounting | $1,000,000 per occurrence, $3,000,000 aggregate |
| Architecture | $2,000,000 per occurrence, $6,000,000 aggregate |
| Asbestos Design, Inspection or Abatement Contractors | $1,000,000 per occurrence, $3,000,000 aggregate |
| Health Care Practitioner (to include Dentists, Licensed Dental Hygienists, Optometrists, Registered or Licensed Practical N tors, Physical Therapists, Physical Therapist Assistant Nurses, Pharmacists, Physicians, Podiatrists, Chiropracts, Clinical Psychologists, Clinical Social Workers, Professional Counselors, Hospitals, or Health Maintenance Organizations.) | $2,150,000 per occurrence, $4,250,000 aggregate<br><br>(Limits increase each July 1 through fiscal year 2031 per *Code of Virginia* § 8.01-581.15. |
| Insurance/Risk Management | $1,000,000 per occurrence, $3,000,000 aggregate |
| Landscape/Architecture | $1,000,000 per occurrence, $1,000,000 aggregate |
| Legal | $1,000,000 per occurrence, $5,000,000 aggregate |
| Professional Engineer | $2,000,000 per occurrence, $6,000,000 aggregate |
| Surveying | $1,000,000 per occurrence, $1,000,000 aggregate |

42. **LATE PROPOSALS:** To be considered for selection, proposals must be received at the address listed on Page 1 of the solicitation no later than the designated date and hour. The official time used in the RFP is that time on the automatic time stamp machine in the location listed on Page 1 of the solicitation. Proposals received at this location after the date and hour designated are automatically disqualified and will not be considered. It is the sole responsibility of the Offeror to ensure that its proposal reaches the designated receipt location no later than the assigned date and hour.

43. **NON-ASSIGNMENT:** Neither Party shall assign or transfer its rights or obligations under this Contract without the prior written consent of the other Party.

44. **NON-EXCLUSIVE CONTRACT:** Nothing herein is intended nor shall be construed as creating any exclusive arrangement with the Contractor. The contract shall not restrict UMW from acquiring similar, equal or like goods and/or services from other sources.

45. **NOTICES:** Any official legal notice, demand, request, consent, approval or communication required by this Agreement to be provided in writing by either party, shall be addressed to the University or Contractor at their respective addresses entered below. These notices shall be sent via certified mail, return receipt requested, and shall be considered by the sender received within five (5) days of delivery to the U.S. Postal Service (for deliveries within the continental U.S.), or via the stamped evidence of delivery, whichever occurs first. Any unofficial notices or communications may be sent via electronic mail.

| | |
|---|---|
| If to the University: University of Mary Washington | If to the Contractor: {CONTRACTOR NAME) |
| Attn.: Procurement Services | Attn: |
| 1301 College Avenue | ADDRESS LINE 1 |
| Fredericksburg, VA 22401 | ADDRESS LINE 2 |

46. **OPERATING VEHICLES ON UMW CAMPUS:** Operating vehicles on sidewalks, plazas and areas heavily used by pedestrians is prohibited unless authorized by the University.

47. **OPTIONAL REDUCED CARBON EMISSION DELIVERY PLAN (RFP):** In addition to standard shipping costs, the Offeror shall also propose an alternative delivery plan that promotes an environmentally friendly approach to reduce carbon emissions. This plan should detail, at a minimum: the type of transportation utilized, the use of local suppliers, applicable fuel types (electric, gas, diesel, etc.), total miles traveled; delivery time variance between the standard and reduced carbon plan; the amount of carbon emissions reduced; and the cost to UMW. The Contractor is encouraged to include other pertinent information to assist UMW with the determination of the best approach.

48. **OWNERSHIP OF MATERIALS:** Any furnished materials, including but not limited to reports, analyses, data, etc., shall remain the property of the University. All such items and materials shall be delivered to UMW in usable condition after completion of the work, and prior to submission of the final invoice for payment. Operating Manuals, procedures, or other documents written for carrying out contract services will remain property of the University once the contract is closed.

49. **PREPROPOSAL CONFERENCE – OPTIONAL:** An optional preproposal conference will be held at **10:00 AM** on **February 18, 2025** in the **Suite 480 Conference Room, located at 1125 Emancipation Hwy., Fredericksburg, VA 22401**. A Zoom link will also be provided for those that are unable to attend in person. The purpose of this conference is to allow potential offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation. 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. Bring a copy of the solicitation with you. Any changes resulting from this conference will be issued in a written addendum to the solicitation.

50. **PRIME CONTRACTOR RESPONSIBILITIES:** The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.

51. **PROCUREMENT MANUAL:** This solicitation and any resulting contract is subject to the provisions of the Commonwealth of Virginia Procurement Manual for Institutions of Higher Education and their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. The manual may be viewed at http://vascupp.org.

52. **PROHIBITION OF HAZARDOUS MATERIALS:** The use of hazardous material is prohibited in support of this Contract. A hazardous material is defined by the Institute of Hazardous Materials Management as any item or agent (biological, chemical, radiological, and/or physical), which has the potential to cause harm to humans, animals, or the environment, either by itself or through interaction with other factors.

53. **RECYCLED CONTENT OF FURNITURE AND FIXTURES:** Furniture and fixtures provided in support of this Contract should consist of a minimum of ____% of recycled materials. A written request for approval to provide furniture and fixtures that do not meet this requirement shall be submitted to the UMW Contract Administrator for approval prior to delivery.

54. **RENEWAL OF CONTRACT:** This contract may be renewed by the University upon written agreement of both parties for five (5) one-year successive terms, or as negotiated, under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration except as stated in 1. and 2. 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.
    1. 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 Consumer Price Index for all Urban Consumers (CPI-U) section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
    2. 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 Consumer Price Index for all Urban Consumers (CPI-U) section of the Consumer Price Index of

the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

55. **SAFETY:** The provisions of all rules and regulations regarding safety as adopted by the Safety Codes Board of the Commonwealth of Virginia issued by the Department of Labor and Industry under Title 40.1 of the Code of Virginia, or any updates, shall apply to all work under this contract. The Contractor shall provide a copy of his/her company safety plan and appropriate material safety data sheets to the University's Safety and Environmental Health Office upon request. Submitted material shall be maintained current during the term of the contract. At the discretion of the University, Contractor personnel may be required to attend a safety orientation briefing to be conducted by the University at a location selected by the University prior to performing work at the University.

56. **SECTION HEADINGS:** Section headings are for the convenience of the parties; and in no way alter, modify, amend, limit, or restrict the contractual obligations of the parties.

57. **SEVERABILITY:** If any term or provision of this Agreement is found by a court of competent jurisdiction to be invalid, illegal or otherwise unenforceable, the same shall not affect the other terms or provisions hereof or the whole of this Agreement, but such term or provision shall be deemed modified to the extent necessary in the court's opinion to render such term or provision enforceable, and the rights and obligations of the parties shall be construed and enforced accordingly, preserving to the fullest permissible extent the intent and agreements of the parties herein set forth.

58. **SOLICITATION COMMUNICATIONS:** From the date of issue of this RFP by the University until an official award or intent to award is issued, or when the University rejects all proposals, all communications regarding information related to the solicitation must be through Procurement Services. Any contact with individuals outside of Procurement regarding information related to the solicitation may result in the rejection of any Offeror's proposal and/or cancellation of this RFP.

59. **SPECIAL EDUCATIONAL OR PROMOTIONAL DISCOUNTS:** The contractor shall extend any special educational or promotional sale prices or discounts immediately to the University during the term of the contract. Such notice shall also advise the duration of the specific sale or discount price.

60. **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 procurement 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 assure compliance with all requirements of the contract.

61. **TITLE IX:** Educational institutions that receive federal financial assistance are covered by Title IX of the Education Amendments of 1972. In compliance with Title IX, the University of Mary Washington prohibits discrimination in employment as well as in all programs and activities on the basis of sex. The University of Mary Washington's Policy on Sexual and Gender Based Harassment and Other Forms of Interpersonal Violence is available for review on the Title IX web page.

62. **UNDERSTANDING OF REQUIREMENTS:** Your signature on your bid/proposal submission certifies your understanding of the following:
    1. It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation.
    2. Therefore, all inquiries deemed to be substantive in nature regarding the specifications or other solicitation documents must be in writing and submitted to the responsible Contract Officer, whose name appears on the face of the solicitation, in the Procurement Services Office no later than five business days before the due date. Offerors must ensure that written inquiries reach the Contract Officer by the date stated in RFP. A copy of all queries and the respective response will be provided in the form of an addendum.
    3. Your signature on your proposal and submission thereof certifies that you fully understand the requirements of this solicitation and have familiarized yourself with all federal, state and local laws, ordinances, rules, and regulations that may affect the cost, progress, or performance of the work. Failure or omission of any Offeror to receive or examine any form, instrument, addendum or other documents, or to acquaint itself with conditions existing at the site, shall in no way relieve the vendor from any obligations with respect to its proposal submission or to the contract.

63. **USE OF RECHARGEABLE BATTERIES:** Battery based tools, equipment, or fixtures utilized in support of this Contract should be rechargeable.

64. **WORK SITE DAMAGES AND PROTECTION OF PERSONS AND PROPERTY:** The Contractor agrees to take every precaution at all times for the protection of persons and property, including employees, students, and the public. Any damage, including damages to existing utilities, equipment, or finished surfaces, resulting from the performance of this contract shall be repaired to the University's satisfaction at the Contractor's expense.

**SUPPLIER ONBOARDING and METHOD OF PAYMENT:** *All awarded Contractors must be registered with the University to receive payment via University-issued check or ACH.* The Contractor shall be paid using one of the following methods for all University initiated procurements:

1. University Charge Card: At the time of verified receipt of goods or services, and proper invoice, if the Contractor's eVA profile indicates acceptance of credit cards in payment, the University will authorize payment by University charge card, currently through the Bank of America Visa, under the following terms:
    a. Any "Check-out fees" imposed by the contractor must be disclosed prior to the purchase.
    b. No check-out fee or surcharge, that was appropriately disclosed in advance of the sale/purchase, shall be greater than 3% of the total sale., effective 4/15/2023. The University expects that these costs, as well as all contractor business expenses will be built into the contractor's quoted price.
2. Virtual Payables through Bank of America: All payments made under Virtual Payables will have a net 16 payment term. For more information about this payment option, contact UMW's Accounts Payable department at: payables@umw.edu or view http://www.bankofamerica.com/epayablesvendors.
3. UMW Check or ACH: *Payment will be made per the terms of the contract, or 30 days after satisfactory performance of the contract in all provisions thereof and upon receipt of a properly completed invoice, whichever is later; in accordance with Chapter 43, VPPA, Article 4, Code of Virginia*.

    NOTE: ACH must be set up in advance prior to submittal of any invoices. https://www.doa.virginia.gov/reference.shtml#edi

To be considered eligible for payment, all physical invoices must be received at the address below and should reference the eVA purchase order and UMW contract numbers as applicable. All electronic invoices must be sent to invoices@mail.umw.edu. *The University will not be responsible for late payment or nonpayment of invoices not received directly by Accounts Payable at this email address or at the mailing address indicated (below).*

UNIVERSITY OF MARY WASHINGTON
Attn: ACCOUNTS PAYABLE
1301 COLLEGE AVENUE
FREDERICKSBURG, VA 22401

University of Mary Washington
Procurement Services

**Standard Contract**

**Contract #**
**Contract Title**

This contract, between CONTRACTOR NAME, hereinafter called the "Contractor", and the Commonwealth of Virginia, University of Mary Washington, called the "University" or "UMW", shall become effective upon [full execution of this document by both parties], [or other date as specified].

**WITNESSETH** that the Contractor and the University, in consideration of the mutual covenants, promises and agreements contained herein, agree as follows:

**PERIOD OF CONTRACT:** Date of Final Execution through MONTH DAY, YEAR with # NUMBER-year/s renewal options.
OR MONTH DAY, YEAR – MONTH DAY, YEAR with # NUMBER-year/s renewal options.

**CONTRACT DOCUMENTS:** The contract shall consist of the following documents *in order of precedence*, all of which are incorporated herein by reference, and constitute the "contract documents":

1. This signed Contract;
2. The University's Contractor's Form Addendum dated ____; (if needed)
3. Any addenda and the original solicitation, RFP # XX-XXX, dated ____ to include:
   a. The Statement of Needs
   b. The General Terms and Conditions
   c. The Special Terms and Conditions;
4. UMW Hosted Technology Services Addendum (HTSA) (as necessary)
5. The Contractor's End User/License Agreement "Title of Agreement"; (if needed)
6. The Contractor's proposal dated ___ including all attachments;

Any contractual claims shall be submitted in accordance with the contractual dispute procedures set forth in the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors.

**SCOPE OF SERVICES:** The Contractor shall provide the [contract goods/services] services described herein. (To be used when Scope of Services is too cumbersome to include in this contract document)

Or

**SCOPE OF SERVICES:** The Contractor agrees to provide the following services: (To be used when the Scope of Services can be included in this contract document)

**PRICING:**

**CONTRACT ADMINISTRATION:** The [contract administrator title], or designee, shall be identified by the University as the Contract Administrator and shall use all powers under the contract to enforce its faithfulness and performance in conjunction with the University's Procurement Services department.

**GENERAL TERMS AND CONDITIONS**: Please refer to the link to follow regarding Required General Terms and Conditions of this Contract.

**SPECIAL TERMS AND CONDITIONS:**

**ADD (from RFP, Terms Library, as applicable)**

(may be edited as necessary to reflect specifically how contract payments will be made, if requested by contractor.)

**METHOD OF PAYMENT/PAYMENT TERMS:** The contractor shall be paid using one of the following methods for all University initiated procurements:

1. University Charge Card: At the time of verified receipt of goods or services, if the Contractor accepts credit cards in payment, the University will authorize payment by UMW charge card, currently through the Bank of America Visa. Any "Check-out fees" imposed by the contractor must be disclosed prior to the purchase. No check-out fee or surcharge may be greater than 3% of the total sale, effective 4/15/2023. The University expects that these costs, as well as all contractor business expenses will be built into the contractor's quoted price.
2. Virtual Payables through Bank of America: All payments under Virtual Payables will have a net 16 payment term.
3. Check or ACH: Payment will be made 30 days after satisfactory performance of the contract in all provisions thereof and upon receipt of a properly completed invoice, whichever is later; in accordance with Chapter 43, VPPA, Article 4, Code of Virginia.

To be considered eligible for payment, all physical invoices must be received at the address below and should reference the eVA purchase order and UMW contract numbers as applicable. All electronic invoices must be sent to invoices@mail.umw.edu. *The University will not be responsible for late payment or nonpayment of invoices not received directly by Accounts Payable at this email address or at the mailing address indicated (below).*

UNIVERSITY OF MARY WASHINGTON
Attn: ACCOUNTS PAYABLE
1301 COLLEGE AVENUE
FREDERICKSBURG, VA 22401

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

In witness, whereof, the parties have caused this Contract to be duly executed intending to be bound thereby.

| **CONTRACTOR NAME** | | **UNIVERSITY OF MARY WASHINGTON** | |
|---|---|---|---|
| Signature: | ______________ | Signature: | ______________ |
| Printed Name: | ______________ | Printed Name: | ______________ |
| Title: | ______________ | Title: | ______________ |
| Date: | ______________ | Date: | ______________ |
| Phone: | ______________ | | |
| Email: | ______________ | | |

**AGREEMENT**
**PUBLICLY ACCESSIBLE CONTRACT**

This Agreement executed this [Date] day of [Month, Year] by and between [VASCUPP MEMBER NAME], ("the University") and [Supplier NAME] ("Supplier").

**TERM**

The term of this Publicly Accessible Contract ("PAC") shall remain in effect until the expiration or termination of the Primary Agreement.

**WITNESS**

WHEREAS, the University and Supplier have executed an agreement, [CONTRACT NUMBER], dated [CONTRACT DATE] (the "Primary Agreement"), and included in the Primary Agreement is a third party access / cooperative procurement clause. Now therefore, the University and Supplier agree to the specific terms that will allow third-party access to the Primary Agreement, and based on other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

I. Supplier will:

A. Allow third parties to obtain goods and services from Supplier in accordance with the terms and pricing of the Primary Agreement ("Third-Party Access").

B. Pay the Virginia Higher Education Procurement Consortium ("Consortium") one percent (1%) of all revenue received by Supplier from non-Consortium entities through Third-Party Access (the "PAC Annual Fee"). The PAC Annual Fee will be paid in exchange for marketing services provided by the University and the Consortium described in Section II.

C. Fully support this marketing relationship by promoting the availability of the Third Party Access to non-Consortium entities; and

D. Provide quarterly reports detailing the amount of revenue received from non-Consortium entities through Third-Party Access.

II. The University will ensure the Consortium:

A. Promotes the Primary Agreement and Third-Party Access on its website and through other channels (e.g., conferences) to non-Consortium members; and

B. Maintains a Supplier-approved version of the Supplier's logo on the Consortium website.

III. Payment

A. Supplier shall remit the PAC Annual Fee to the Consortium no later than August 31st of each year. The University and Consortium will share the payments equally and allocate payments to the appropriate accounts.

If the Primary Agreement expires or terminates before August 31st, Supplier shall remit the PAC Annual Fee no later than 45 calendar days from expiration or termination date of the Primary Agreement.

B. Supplier shall remit the PAC Annual Fee by check in U.S. dollars. Checks will be made payable to the University of Virginia and sent to:

Procurement Office Manager
Procurement and Supplier Diversity Services
University of Virginia, Carruthers Hall
PO Box 400202
1001 N. Emmet Street
Charlottesville, VA 22904

Note 'PAC payment' on check.

IV. Notices

Any notice required or permitted to be given under this Agreement will be in writing and will be deemed duly given: (1) if delivered personally, when received; (2) if sent by recognized overnight courier service, on the date of the receipt provided by such courier service; (3) if sent by registered mail, postage prepaid, return receipt requested, on the date shown on the signed receipt: or (4) if sent by electronic mail, on the next business day of the receiver. All such notices will be addressed to a party at such party's address as shown below.

If to the University:

[Lead School Procurement Director]
[Lead School Procurement Address & Contact Info]

If to [Supplier]:

[Supplier Contact]
[Supplier]
[Address]
Email: [Supplier Email]

**ACCEPTANCE**

**For [Lead Institution]**

______________________________
[Lead Procurement Director]
[Lead Job Title]

________________
Date

**For [Supplier]**

______________________________
[Supplier Contact]
[Supplier Contact Title]

______________
Date

Agreement #:[Contract-Number]-PAC

University of Mary Washington
Procurement Services

**Hosted Technology Services Addendum**

SUPPLIER NAME: ______________________________

SUPPLIER PRODUCT/SOLUTION: ______________________________

This Addendum shall be included in any procurement deemed necessary requiring hosted technology services for the purpose of ensuring that the Commonwealth of Virginia and University of Mary Washington, technology standards are complied with for the duration of the agreement between the University and the Vendor.

**Definitions:**

- Agreement: The "Agreement" includes the contract, this addendum and any additional addenda and attachments to the contract, including the Contractor's Form.
- University: "University" or "the University" means University of Mary Washington, its trustees, officers and employees. The point of contact for the University is the contract administrator for this Agreement.
- University Data: "University Data" is defined as any data that the Vendor creates, obtains, accesses, transmits, maintains, uses, processes, stores or disposes of in performance of the Agreement. It includes all Personally Identifiable Information and other information that is not intentionally made generally available by the University on public websites.
- Personally Identifiable Information: "Personally Identifiable Information" (PII) includes but is not limited to: Any information that directly relates to an individual and is reasonably likely to enable identification of that individual or information that is defined as PII and subject to protection by University of Mary Washington under federal or Commonwealth of Virginia law.
- Security Breach: "Security Breach" means a security-relevant event in which the security of a system or procedure involving University Data is breached, and in which University Data is exposed to unauthorized disclosure, access, alteration, or use.
- Service(s): "Service" or "Services" means any goods or services acquired by the University from the Vendor.

1. **Rights and License in and to University Data:** The parties agree that as between them, all rights including all intellectual property rights in and to University Data shall remain the exclusive property of the University, and Contractor has a limited, nonexclusive license to use these data as provided in this Agreement solely for the purpose of performing its obligations hereunder.

2. **Nonvisual Access To Technology:** All information technology which, pursuant to this Agreement, is purchased or upgraded by or for the use of any Commonwealth agency or institution or political subdivision of the Commonwealth (the "Technology") shall comply with Section 508 of the Rehabilitation Act (29 U.S.C. 794d), as amended. If requested, the Contractor must provide a detailed explanation of how compliance with Section 508 of the Rehabilitation Act is achieved and a validation of concept demonstration. The requirements of this Paragraph along with the Non-Visual Access to Technology Clause shall be construed to achieve full compliance with the Information Technology Access Act, §§2.2-3500 through 2.2-3504 of the Code of Virginia. Compliance may be determined by the degree to which the product meets the recommendations described in the VPAT (Voluntary Product Accessibility Template) and/or WCAG 2.0 Level AA guidelines.

3. **Data Privacy:**
   a. Contractor will use University Data only for the purpose of fulfilling its duties under this Agreement and will not share such data with or disclose it to any third party without the prior written consent of the University, except as required by this Agreement or as otherwise required by law.

b. University Data will not be stored outside the United States without prior written consent from the University.

c. Contractor will provide access to University Data only to its employees and subcontractors who need to access the data to fulfill obligations under this Agreement. The Contractor will ensure that the Contractor's employees who perform work under this Agreement have read, understood, and received appropriate instruction as to how to comply with the data protection provisions of this Agreement.

   i. If the Contractor will have access to the records protected by the Family Educational Rights and Privacy Act (FERPA), Contractor acknowledges that for the purposes of this Agreement it will be designated as a "school official" with "legitimate educational interests" in such records, as those terms have been defined under FERPA and its implementing regulations, and Contractor agrees to abide by the limitations and requirements imposed on school officials. Contractor will use such records only for the purpose of fulfilling its duties under this Agreement for University's and its End Users' benefit, and will not share such data with or disclose it to any third party except as provided for in this Agreement, required by law, or authorized in writing by the University.

4. **Data Security:**

a. Contractor will store and process University Data in accordance with commercial best practices, including appropriate administrative, physical, and technical safeguards, to secure such data from unauthorized access, disclosure, alteration, and use. Such measures will be no less protective than those used to secure Contractor's own data of a similar type, and in no event less than reasonable in view of the type and nature of the data involved.

b. Contractor will store and process University Data in a secure site and will provide a SAS 70, SAS 70 Type II, SSAE 16, SOC 2 or SOC 3, or other security report deemed sufficient by the University, from a third party reviewer along with annual updated security reports.

c. Contractor will use industry-standards and up-to-date security tools, technologies and practices such as network firewalls, anti-virus, vulnerability scans, system logging, intrusion detection, 24x7 system monitoring and third-party penetration testing in providing services under this Agreement.

d. Without limiting the foregoing, Contractor warrants that all electronic University Data will be encrypted in transmission (including via web interface) and stored at AES 256 of stronger.

5. **Data Authenticity, Integrity and Availability:**

a. Contractor will take reasonable measures, including audit trails, to protect University Data against deterioration or degradation of data quality and authenticity. Contractor shall be responsible for ensuring that University Data, per the Virginia Public Records Act, "is preserved, maintained, and accessible throughout their lifecycle, including converting and migrating electronic data as often as necessary so that information is not lost due to hardware, software, or media obsolescence or deterioration."

b. Contractor will ensure backups are successfully completed at the agreed interval and that restoration capability is maintained for restoration to a point-in-time and\or to the most current backup available.

c. Contractor will maintain an uptime of 99.99% or greater, or as negotiated and accepted by the University, as agreed to for the contracted services via the use of appropriate redundancy, continuity of operations and disaster recovery planning and implementations, excluding regularly scheduled maintenance time.

6. **Employee Qualifications:**

a. Contractor shall ensure that its employees have undergone appropriate background screening and possess all needed qualifications to comply with the terms of this agreement including but not limited to all terms relating to data and intellectual property protection.

7. **Security Breach:**

a. Response. Immediately (within one day) upon becoming aware of a Security Breach, or of circumstances that could have resulted in unauthorized access to or disclosure or use of University Data, Contractor will notify the University, fully investigate the incident, and cooperate fully with the University's investigation of and response to the incident. Except as otherwise required by law, Contractor will not provide notice of the incident directly to individuals whose Personally Identifiable Information was involved, regulatory agencies, or other entities, without prior written permission from the University.
b. Liability. In addition to any other remedies available to the University under law or equity, when applicable to the type services being provided, Contractor will pay for or reimburse the University in full for all costs incurred by the University in investigation and remediation of such Security Breach, including but not limited to providing notification to individuals whose Personally Identifiable Information was compromised and to regulatory agencies or other entities as required by law or contract; providing one year's credit monitoring to the affected individuals if the Personally Identifiable Information exposed during the breach could be used to commit financial identity theft; and the payment of legal fees, audit costs, fines, and other fees imposed by regulatory agencies or contracting partners as a result of the Security Breach. Contractor agrees to indemnify, hold harmless and defend the University from and against any and all claims, damages, or other harm related to such Security Breach.

8. **Requests for Data, Response to Legal Orders or Demands for Data:**
   a. Except as otherwise expressly prohibited by law, Contractor will:
      i. immediately notify the University of any subpoenas, warrants, or other legal orders, demands or requests received by Contractor seeking University Data;
      ii. consult with the University regarding its response;
      iii. cooperate with the University's requests in connection with efforts by the University to intervene and quash or modify the legal order, demand or request; and
      iv. Upon the University's request, provide the University with a copy of its response.
   b. Contractor will make itself and any employees, contractors, or agents assisting in the performance of its obligations under the Agreement, available to the University at no cost to the University based upon claimed violation of any laws relating to security and\or privacy of the data that arises out of this agreement. This shall include any data preservation or eDiscovery required by the University.
   c. The University may request and obtain access to University Data and related logs at any time for any reason and at no extra cost.

9. **Data Transfer Upon Termination or Expiration:**
   a. Contractor's obligations to protect University Data shall survive termination of this Agreement until all University Data has been returned or Securely Destroyed, meaning taking actions that render data written on media unrecoverable by both ordinary and extraordinary means.
   b. Upon termination or expiration of this Agreement, Contractor will ensure that all University Data are securely transferred, returned or destroyed as directed by the University in its sole discretion within 30 days of termination of this Agreement. Transfer/migration to the University or a third party designated by the University shall occur without significant interruption in service. Contractor shall ensure that such transfer/migration uses facilities, methods, and data formats that are accessible and compatible with the relevant systems of the University or its transferee, and to the extent technologically feasible, that the University will have reasonable access to University Data during the transition.
   c. In the event that the University requests destruction of its data, Contractor agrees to Securely Destroy all data in its possession and in the possession of any subcontractors or agents to which Contractor might have transferred University data. Contractor agrees to provide documentation of data destruction to the University and to complete any required Commonwealth of Virginia documentation regarding the destruction of University Data.

d. Contractor will notify the University of impending cessation of its business and any contingency plans. This includes immediate transfer of any previously escrowed assets and data and providing the University access to Contractor's facilities to remove and destroy University-owned assets and data. Contractor shall implement its exit plan and take all necessary actions to ensure a smooth transition of service with minimal disruption to the University. The Vendor will also provide a full inventory and configuration of servers, routers, other hardware, and software involved in service delivery along with supporting documentation, indicating which if any of these are owned by or dedicated to the University. Contractor will work closely with its successor to ensure a successful transition to the new equipment, with minimal downtime and effect on the University, all such work to be coordinated and performed in advance of the formal, final transition date.

10. **Audits:**

a. The University reserves the right in its sole discretion to perform audits of Contractor at no additional cost to the University to ensure compliance with the terms of this Agreement. Contractor shall reasonably cooperate in the performance of such audits. This provision applies to all agreements under which Contractor must create, obtain, transmit, use, maintain, process, or dispose of University Data.

b. If Contractor must under this agreement create, obtain, transmit, use, maintain, process, or dispose of the subset of University Data known as Personally Identifiable Information or financial or business data, Contractor will at its expense conduct or have conducted at least annually a(n):

i. American Institute of CPAs Service Organization Controls (SOC) Type II audit, or other security audit with audit objectives deemed sufficient by the University, which attests Contractor's security policies, procedures and controls;

ii. vulnerability scan, performed by a scanner approved by the University, of Contractor's electronic systems and facilities that are used in any way to deliver electronic services under this Agreement; and

iii. formal penetration test, performed by a process and qualified personnel approved by the University, of Contractor's electronic systems and facilities that are used in any way to deliver electronic services under this Agreement.

c. Additionally, Contractor will provide the University upon request the results of the above audits, scans and tests, and will promptly modify its security measures as needed based on those results in order to meet its obligations under this Agreement.

11. **Compliance:**

a. Contractor will comply with all applicable laws and industry standards in performing services under this Agreement. Any Contractor personnel visiting the University's facilities will comply with all applicable University policies regarding access to, use of, and conduct within such facilities. The University will provide copies of such policies to Contractor upon request.

b. Contractor warrants that the service it will provide to the University is fully compliant with and will enable the University to be compliant with relevant requirements of all laws, regulation, and guidance applicable to the University and/or Contractor, including but not limited to: the Family Educational Rights and Privacy Act (FERPA), Health Insurance Portability and Accountability Act (HIPAA) and Health Information Technology for Economic and Clinical Health Act (HITECH), Gramm-Leach-Bliley Financial Modernization Act (GLB), Payment Card Industry Data Security Standards (PCI-DSS), Americans with Disabilities Act (ADA).

12. **No End User Agreements:** Any agreements or understandings, whether electronic, click through, verbal or in writing, between Contractor and University employees or other end users under this Agreement that conflict with the terms of this Agreement, including but not limited to this Addendum, shall not be valid or binding on the University or any such end users.

***To the extent allowed by Virginia law, the University of Mary Washington will keep any information provided in a security audit report confidential to protect the integrity of the Vendor.***

This Addendum and any other related and attached documents constitute the entire agreement between the parties and may not be waived of modified except by written agreement between the parties.

This Agency does not discriminate against faith-based organizations.

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

| **CONTRACTOR** | | **UNIVERSITY OF MARY WASHINGTON** | |
|---|---|---|---|
| SIGNATURE: | ______________________ | SIGNATURE: | ______________________ |
| PRINTED NAME: | ______________________ | PRINTED NAME: | ______________________ |
| TITLE: | ______________________ | TITLE: | ______________________ |
| DATE: | ______________________ | DATE: | ______________________ |

**ATTACHMENT D**

**3RD FLOOR - UMW CAMPUS STORE**

**Scale 1/4" = 1'0"**

**ATTACHMENT E**

Zone Map


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

### List of member institutions by zones

**Zone 1**
**George Mason University (Fairfax)**

**Zone 2**
**James Madison University (Harrisonburg)**

**Zone 3**
**University of Virginia (Charlottesville)**

**Zone 4**
**University of Mary Washington (Fredericksburg)**

**Zone 5**
**Christopher Newport University (Newport News)**
**College of William and Mary (Williamsburg)**
**Norfolk State University (Norfolk)**
**Old Dominion University (Norfolk)**

**Zone 6**
**Virginia Commonwealth University (Richmond)**
**Virginia State University (Petersburg)**

**Zone 7**
**Longwood University (Farmville)**

**Zone 8**
**Virginia Military Institute (Lexington)**
**Virginia Tech (Blacksburg)**
**Radford University (Radford)**

**Zone 9**
**University of Virginia - Wise (Wise)**

## SMALL BUSINESS SUBCONTRACTING PLAN

MUST BE COMPLETED AND RETURNED WITH PROPOSAL PACKAGE

**All small businesses must be certified by the Commonwealth of Virginia, Department of Small Business and Supplier Diversity (DSBSD) by the due date of the solicitation to participate in the SWaM program. Certification applications are available through DSBSD online at http://sbsd.virginia.gov.**

**DEFINITIONS:**

**"Micro Business"** means a business that is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees and no more than $3 million in average annual revenue over the three-year period prior to their certification.

**"Small business"** means a business independently owned and controlled by one or more individuals who are U.S. citizens or legal resident aliens, and together with affiliates, has 250 or fewer employees, or average annual gross receipts of $10 million or less averaged over the previous three years. One or more of the individual owners shall control both the management and daily business operations of the small business. *Note: DSBSD-certified women- and minority-owned businesses shall also be considered small businesses when they have received DSBSD small business certification.* (*Code of Virginia*, § 2.2-4310)

**"Woman-owned business"** means a business that is at least 51% owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more women.
(*Code of Virginia*, § 2.2-4310)

**"Minority-owned business"** means a business that is at least 51% owned by one or more minority individuals who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more minority individuals.
(*Code of Virginia*, § 2.2-4310)

**Bidder Name:** ______________________________________________________________

**Preparer Name:** ____________________________________ **Date:** ___________________

**INSTRUCTIONS:**

A. If you are certified by the Department of Small Business and Supplier Diversity (DSBSD) as a small business, complete only Section A of this form. This shall not exclude DSBSD-certified women-owned and minority-owned businesses when they have received DSBSD small business certification.
B. If you are not a DSBSD-certified small business, complete Section B of this form. For the bid to be considered and the bidder to be declared responsive, the bidder shall identify the portions of the contract that will be subcontracted to DSBSD-certified small business in Section B.

**ATTACHMENT F (CONT'D)**

**Section A**

If you are certified by the Department of Small Business and Supplier Diversity (DSBSD), are you certified as a:

**Check All That Apply:** ☐ Micro Business ☐ Small Business ☐ Woman-Owned Business ☐ Minority-Owned Business

DSBSD Certification No.: ______________________ Expiration Date: ______________________

---

**Section B**

Populate the table below to show your plans for utilization of DSBSD-certified small businesses in the performance of this contract. This shall not exclude DSBSD-certified women-owned and minority-owned businesses that have received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.

**Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement**

| Small Business Name, Address & DSBSD Cert No. | Indicate if also: Micro (O), Women (W), or Minority (M) Certified | Contact Person, Telephone & Email | Type of Goods and/or Services | Planned Involvement During Initial Period of the Contract (%) | Planned Contract Dollars During Initial Period of the Contract ($) |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | **Total Planned Subcontracting Spend ($)** | |

## RFP 25-1828 Proposal Submission Checklist

It is important that the Offeror carefully read through the RFP and provide all required documentation. The proposal MUST be submitted and received on time to qualify for a chance at evaluation. Use this checklist as a guideline to ensure the proposal is complete before submission.

### IMPORTANT DATES & REMINDERS

- Optional Pre-Proposal Conference Date: **February 18, 2025** – Conference will be held at **10:00 AM** in the **Suite 480 Conference Room, located at 1125 Emancipation Hwy., Fredericksburg, VA 22401.** A Zoom link will be provided to those who are unable to attend in person. Please email Lindsay Fare at lfare@umw.edu or call 540-654-1057 to RSVP. See Pre-Proposal Conference clause in the Special Terms and Conditions.

- No Questions Accepted after **2:00 PM on February 25, 2025.** All Questions must be directed toward the Procurement Officer for this solicitation. Please email all questions to Lindsay Fare at lfare@umw.edu or call 540-654-1057.

- Proposal Due Date: **March 10, 2025** - Proposals submitted after **2:00 PM** as indicated by the official Procurement clock will NOT be accepted.

- All proposals must be submitted in a **SEALED** envelope identifying the firm's name and the solicitation number at a minimum. If sending the proposal by mail, the address to send the proposal to is located on the RFP Cover Page.

- **Read the ENTIRE RFP including terms and conditions and attachments carefully before submitting a proposal.**

### REQUIRED DOCUMENT SUBMISSION

Acknowledgement:

☐ **The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or as a trade secret is not acceptable.** If, after being given reasonable time, the Offeror refuses to withdraw an entire classification designation, the proposal will be rejected.

Documents to Submit:

☐ Completed and signed RFP
☐ Any/All signed addenda
☐ Electronic Copy of Proposal (Original and Redacted) regardless if submitting through eVA VBO or delivering in person
☐ Description of the Offering firm's history and expertise that demonstrate its ability to successfully complete the Statement of Needs
☐ Completed Attachment F: Small Business Subcontracting Plan
☐ A prepared Sales and Commission payment tier matrix
☐ Any exceptions taken to the University's Terms and Conditions
☐ Current Certificate of Liability Insurance


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adminfinance.umw.edu/procurement

**Exhibit B**

University of Mary Washington
Procurement Services

**ADDENDUM**
February 28, 2025

**ADDENDUM NO. 1 TO ALL OFFERORS:**

| | |
|---|---|
| Reference – Request for Proposals: | RFP 25-1828: Campus Store Operations |
| Date Issued: | February 7, 2025 |
| For Delivery to: | University of Mary Washington, Commonwealth of Virginia |
| Proposal Due Date: | Monday, March 10, 2025 at 2:00 PM EST |

This addendum consists of seven (7) pages.

Questions from Offerors:

1. **Q: It states in RFP 25-1828 that it is being issued by the University of Mary Washington (UMW) on behalf of the Virginia Higher Education Procurement Consortium (VHPEC). How does a VHEPC cooperative contract and PAC Agreement work?**
   A: The intent of this RFP solicitation issued by UMW on behalf of VHEPC is to provide a master contract vehicle containing VHEPC cooperative language, as well as to provide required services for UMW. VHEPC makes most of their cooperative contracts available for any agency to use. They allow any organization that a vendor approves, whether it be public and private colleges, K-12 school systems, health institutions, cities, and municipalities, to access their contracts. The Consortium currently represents 37 schools within the state of Virginia. Non-Consortium entities may be nationwide. Using a VHEPC contract eliminates the need for other entities, as well as vendors, to spend time and money in issuing and responding to additional RFPs. If a vendor approves a non-member entity's use of their VHEPC contract, the agency would simply need to execute a bridge agreement to the vendor's VHEPC contract (incorporating any business specifics and necessary additional terms and conditions). The Vendor will then pay the VHEPC one percent (1%) of all revenue received from non-Consortium entities through Third-Party Access (the "PAC Annual Fee"). The PAC Annual Fee is paid in exchange for marketing services provided by the University and the Consortium. Further details are described in Attachment B – PAC Agreement Sample, Section II.

2. **Q: Please provide a list of the college owned FF&E *(furniture, fixtures & equipment)* that will remain in the store if the College transitions to a new bookstore provider.**
   A: Most but not all FF&E in the store are owned by the University. A complete list is not available.

3. **Q: What is the existing total inventory value? Is it the expectation of the University that the selected operator purchases all of it?**
   A: The total inventory value as of 02/25/2025 is $427,924.00. Selected operator would be required to purchase inventory in accordance with the terms of contract UMW 18-797 – Bookstore and Retail Operations, IV., E. and VI., D., 8.

4. **Q: Where is the nearest accessible dock?**
   A: The nearest accessible dock is at the back of Lee Hall, ground floor. Please see Attachment H – Fredericksburg Campus Map for the location of Lee Hall (#26).


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adminfinance.umw.edu/procurement

5. **Q: Attachment D – UMW Campus Store Floor Plan has some details in the legend regarding Demo, To Remain, Relocate etc. Have these changes already been made?**
   A: No.

   **Q: If not, can you speak more about that?**
   A: The changes described on the attachment are not related to this RFP.
   **Q: Are there any plans to move or alter the current bookstore location?**
   A: There are no plans to relocate the current bookstore, but the footprint may be reduced within the existing space.

6. **Q: Is it the desire of the institution for the chosen vendor to retain the bookstore's current full-time employees?**
   A: Current bookstore staff is well regarded at UMW.
   **Q: If so, please provide a listing of the current full-time employees and each of their attributable annual salaries.**
   A: Staff salary information is not available to UMW.

7. **Q: Please provide a booklist in excel or. csv for the current semester, and as many as three years back, by semester. That list would show:**
   - **ISBN**
   - **Course**
   - **Credit hours of each course**
   - **Actual enrollment by course (capacity and estimated enrollment are not helpful for our calculations, just for context)**
   - **Units sold by course**
   - **Gross sales by course, if available**

   A. Please see Attachment I – Adoption Report for this information.

8. **Q: What percentage of courses use a textbook?**
   A: 42% of courses not labeled independent study utilize a textbook.

9. **Q: What percentage of courses use courseware (i.e., My Pearson Lab, Cengage Now, Wiley Plus, etc.)?**
   A: 12% of courses not labeled independent study use courseware.

10. **Q: What percentage of courses use OER materials?**
    A: 6% courses not labeled independent study use OER materials.

11. **Q: What goals does your institution have in place for the use of OER over the next five years?**
    A: Guidance for OER Materials can be found at the link below.
    - OpenUMW

12. **Q: Are you currently running Inclusive Access (IA) programs?**
    A: Yes
    **Q: If yes, how many courses/sections are using IA materials**?
    - Spring 2025: 68 courses, 112 sections
    - Fall 2024: 67 courses, 119 sections


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**Q: If yes, what is the annual sales volume of IA?**

- FY24 IA sales = $495,336.

**Q: If yes, are the sales numbers already included in the digital line item above?** Yes.

**Q: If yes, what digital provider is supporting IA courses (Verba/VitalSource, Willo, RedShelf, Publisher direct, etc.)?**

A: The digital providers supporting Inclusive Access courses are Yuzu/VitalSource and publisher content.

**Q: If yes, do any IA courses go directly through the publisher?**

A: No.

**Q: If yes, is the bookstore currently the exclusive conveyor of Inclusive Access (IA)?**

A: Bookstore is the sole purveyor of Inclusive Access.

13. **Q: Please provide your brand guidelines.**

    A: Brand guidelines can be found in the three attachments below. Attachments are listed within the eVA VBO for RFP 25-1828.

    - Attachment J – UMW Athletics Brand Guide 2022
    - Attachment K – UMW Toolkit 2021 (Lo-Res)
    - Attachment L – UMW Toolkit Supplement 2022

14. **Q: Is your merchandise licensed?**

    A: Yes. Please refer to RFP 25-1828, VII., K., 2.

    **Q: If yes, do you work with a third-party licensing agency?**

    A: No. UMW is self-licensed. Please reference RFP 25-1828, VII., K., 2.

15. **Q: Are there any limitations on convenience offerings for food or beverage?**

    A: Yes

    **Q: Please elaborate on other agreements.**

    A: Agreements can be found at the links below. Please also see RFP 25-1828, VII., V.

    - Sodexo: UCPUMW 23-1457 – Dining Service Operations
    - Pepsi: COOP 24-1755 – Pepsi Pouring Rights

16. **Q: Does the store support in-venue sales at athletic events?**

    A: It is desirable that the store support in-venue sales at athletic events.

    - Which sports? N/A
    - What is the approximate revenue from in-venue sales? N/A

17. **Q. Do all athletic merchandise sales go through the campus store? If not, who handles those sales?**

    A: Please reference UMW Contract Number COOP 22-1356 provided in the link below. BSN Sports provides short term pop-up stores as fundraisers for teams.

    - BSN Sports: COOP 22-1356 – Athletic Sports Apparel

18. **Q: What is the bookstore's role in selling/distributing graduation caps and gowns?**

    A: Please refer to RFP 25-1828, VII., C., 2. and VII., M.

19. **Q: How many collegiate level athletic teams does the institution have?**

    A: Information can be found using the link below. Once on the site, be sure to click on the three lines in the top left corner. From there, click "Sports" from the dropdown for the list of sports.


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- University of Mary Washington Eagles

20. **Q: What are the current challenges with your existing bookstore operations that you would like to see addressed?**
    A: Please refer to RFP 25-1828, VII., B., 2. and K. through L., 1. and 3.

21. **Q: Are there any programs run by the incumbent bookstore provider that you would like to see continue that are outside of the normal operations of the college bookstore?**
    A: The Bookstore supports campus events outside of store operating hours and such support is required to continue. These include but are not limited to book sales at the Great Lives Series. Please also reference RFP 25-1828, VII.,C., c.

22. **Q: Who is on the RFP Committee and what are their roles at the institution?**
    A: We are not able to disclose the names or roles of the RFP Committee.

23. **Q: Please describe how students utilize their financial aid in the campus store and if there are any restrictions.**
    A: Financial Aid can be used in-store and online. Restrictions may vary by type of aid.

24. **Q: If this discussion includes an Equitable Access Program (EA), please provide the total Credit Hours enrolled for the previous three semesters.**
    A: The University does not have an Equitable Access Program.

25. **Q: How many students currently live in on-campus housing?**
    A: As of 02/24/2025, there are 1,939 students currently living on campus.

26. **Q: Can you provide the CAD file for store space?**
    A: We are not able to provide a CAD file of the floor plan, but please refer to RFP 25-1828: Attachment D for a pdf version of the space.

27. **Q: Is there an unamortized/undepreciated balance from prior store renovations or from any one-time contractual contributions? If yes, will a subsequent vendor be expected to cover this cost and how much will that amount be at the end of the agreement or as of June 30, 2025?**
    A: There is no unamortized/undepreciated balance that a vendor is expected to cover.

28. **Q: How many courses, sections and titles are in the Inclusive Access (course by course) program?**
    A: Please see Attachment I – Adoption Report to view the courses and sections using Inclusive Access for Spring 2025.

29. **Q: Is the current Inclusive Access only digital materials or are there print materials in the current offering? What is the percentage of digital v. print?**
    A: Inclusive Access materials may be accompanied by a low-cost physical book. Otherwise, Inclusive Access is only digital.

30. **Q: Please provide total Credit Hours enrolled for Summer 2024, Fall 2024, and Spring 2025.**

    A: Total students and credit hours enrolled:
    - Summer 2024: 1,042 students enrolled in 5,257 credit hours
    - Fall 2024: 3,855 students enrolled in 50,003 credit hours
    - Spring 2025: 3,503 students enrolled in 45,890 credit hours

31. **Q: Can you provide Sales breakdown by Category Year to Date for FY 25? Please provide an explanation of any sales listed as "other".**

| Sales Period: May 2024 - Jan. 2025, week 4: | |
|---|---|
| | FY25 YTD Jan 2025 |
| **Total Course Materials** | **832,828** |
| **Physical Textbook Sales** | **249,827** |
| 66 New Textbooks | 187,290 |
| 67 Used Textbooks | 62,537 |
| **Physical Textbook Rentals** | **145,283** |
| 36 Publisher Rentals | 7,886 |
| 46 New Textbook Rentals | 55,368 |
| 47 Used Textbook Rentals | 82,029 |
| **Digital Course Materials** | **437,717** |
| 62 Printed Access Cards | 15,590 |
| 64 Digital Courseware | 349,146 |
| 65 eTextbooks | 72,981 |
| **Total General Merchandise** | **400,077** |
| **Logo Products** | **260,111** |
| 80 School Spirit Clothing | 224,342 |
| 94 Backpacks | 809 |
| 96 School Spirit, Gifts, Accessories | 34,960 |
| **NonLogo Products** | **139,966** |
| 68 Trade Books | 7,614 |
| **Supply Products** | **77,941** |
| 70 School Supplies | 33,131 |
| 71 Electronics NonCommissionable | 4,915 |
| 72 Computer Peripherals | 14,253 |
| 98 Course Required Supplies | 25,642 |
| **Food Products** | **18,822** |
| 89 Cafe | 375 |
| 91 Convenience | 18,447 |
| **Miscellaneous Products** | **9,739** |
| 81 NonEmblematic Trend Area | 8,753 |
| 92 Dorm Furnishings-Regional Buys | 870 |
| 93 Greeting Cards | 116 |
| **Grad Products** | **25,850** |
| 90 Graduation Products | 9,841 |
| 97 Prints, Frames, Museum Shop | 16,009 |
| **Total Sales** | **1,232,905** |

32. **Q: Does the current provider support in venue sales for any athletic events? If yes, what is the approximate annual sales?**

    A: No.

33. **Q: What are the top three challenges that Mary Washington faces with current course materials operations that the institution hopes to resolve with a new provider?**
    A: Please reference RFP 25-1828 for course materials requirements.

34. **Q: What is the highest priority item in the RFP?**
    A: Please note that all elements outlined in this RFP are of equal importance. We expect comprehensive attention to all aspects of the proposal, and responses should address each requirement with the same level of urgency and focus.

35. **Q: If a general merchandise provider and a course material provider strategically align to serve Mary Washington, would the institution prefer one or two contracts.**
    A: In the case of a course material provider firm subcontracting with a general merchandise provider, then one contract. In the case that one firm is awarded course materials and another is awarded general merchandise as a result of this RFP, then two contracts.

36. **Q: Is Financial Aid allocated to students for textbooks and course materials and used as a tender type in the current bookstore?**
    A: Yes. Financial Aid is utilized as a tender in the physical store and on the online store.
    **Q: If so, can you describe the process for how Financial Aid is distributed and then used for course materials/textbooks?**
    A: The current POS system interfaces with UMW's ERP, Ellucian Banner when students use their Financial Aid for materials/textbooks.

37. **Q: What percentage of Mary Washington students receive Financial Aid?**
    A: Further clarification is needed from vendor. Answer will be posted under Addendum 2.

38. **Q: What percentage of overall sales in the bookstore came from Financial Aid?**
    A: Further clarification is needed from vendor. Answer will be posted under Addendum 2.

39. **Q: Are there any sales reflected in the historical sales numbers that were a result of a one-time grant or other funding that will not occur in the future?**
    A: In FY24, vendor provided scholarships accounted for $1,519.45 in sales.

40. **Q: What percentage of the courses utilize free OER content?**
    A: 6% of courses not labeled independent study utilize OER content.

41. **Q: Does UMW have any direct agreements in place with publishers or other third-party course material providers?**
    A: No

42. **Q: Is UMW open to self-operating a spirit store (apparel, merchandise, sundry items, etc.) with an online bookstore vendor providing all student-purchased materials shipped directly to the campus bookstore for student pickup?**
    A: UMW is open to considering a self-operated spirit store. Please confirm whether in such a case, the course materials provider would provide necessary course supplies (lab coats, goggles, art kits, etc.).

43. **Q: Does UMW have any Inclusive Access course material adoptions? If so, how many courses have inclusive access adoptions?**
    A: Yes.
    - Fall 2024: 67 courses, 119 sections
    - Spring 2025: 68 courses, 112 sections

44. **Q: Would UMW be interested in implementing an Equitable Access solution, an in-tuition solution where all course materials are automatically delivered to all students with the costs included as part of the cost of attendance?**
    A: UMW would not be interested in implementing an Equitable Access solution at this time.

**END OF ADDENDUM NO. 1**

Lindsay Fare
Senior Contract Officer
Procurement Services
University of Mary Washington
Phone: 540-654-1057

RFP 25-1828 Addendum No. 1 (and all addenda) should be acknowledged and included in the RFP submittal package.

NAME OF OFFERING FIRM: ______________________________

NAME OF OFFEROR REPRESENTATIVE: ______________________________

OFFEROR SIGNATURE: ______________________________

DATE: ______________________________

# Exhibit C

University of Mary Washington
Procurement Services

**ADDENDUM**
March 6, 2025

**ADDENDUM NO. 2 TO ALL OFFERORS:**

| | |
|---|---|
| Reference – Request for Proposals: | RFP 25-1828: Campus Store Operations |
| Date Issued: | February 7, 2025 |
| For Delivery to: | University of Mary Washington, Commonwealth of Virginia |
| Proposal Due Date: | Thursday, March 13, 2025 at 2:00 PM EST |

This addendum consists of one (1) page.

UPDATED Proposal Due Date:
Virginia's eProcurement System, eVA has been experiencing severe down time due to maintenance since 5:00 PM Friday, February 28, 2025. Although certain functionalities have been restored, the inability for electronic submissions through the eVA VBO is still present. With that said, the Proposal Due Date has now changed from Monday, March 10, 2025 at 2:00 PM EST to Thursday, March 13, 2025 at 2:00 PM EST. This should allow plenty of time for the eVA VBO to regain full functionality.

Questions from Offerors that required further clarification after Addendum No. 1 was issued:

1. **Q: What percentage of Mary Washington students receive Financial Aid?**
   A: 91% of all students that attend the University of Mary Washington receive some form of Financial Aid.

2. **Q: What percentage of overall sales in the bookstore came from Financial Aid?**
   A: In FY24, the gross sales for the bookstore were $1,464,764. $16,938.79 of those sales came from Financial Aid, which equates to 1.16%.

**END OF ADDENDUM NO. 2**
Lindsay Fare
Senior Contract Officer
Procurement Services
University of Mary Washington
Phone: 540-654-1057

RFP 25-1828 Addendum No. 2 (and all addenda) should be acknowledged and included in the RFP submittal package.

NAME OF OFFERING FIRM: Ambassador College Bookstores Inc DBA Ambassador Education Solutions

NAME OF OFFEROR REPRESENTATIVE: Steven M. Blicht

OFFEROR SIGNATURE: DocuSigned by: Steven M. Blicht 42B7D49D071D45B...

DATE: 7/21/2026


1301 College Avenue
Fredericksburg, VA 22401-5300
procure@umw.edu
adminfinance.umw.edu/procurement

# Exhibit D

## AGREEMENT
## PUBLICLY ACCESSIBLE CONTRACT

This Agreement executed this 20th day of July, 2026 by and between the University of Mary Washington ("the University") and Ambassador Education Solutions ("Supplier").

### TERM

The term of this Publicly Accessible Contract ("PAC") shall remain in effect until the expiration or termination of the Primary Agreement.

### WITNESS

WHEREAS, the University and Supplier have executed an agreement, UCPUMW 25-1828 (the "Primary Agreement"), and included in the Primary Agreement is a third-party access / cooperative procurement clause. Now therefore, the University and Supplier agree to the specific terms that will allow third-party access to the Primary Agreement, and based on other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

I. Supplier will:

A. Allow third parties to obtain goods and services from Supplier in accordance with the terms and pricing of the Primary Agreement ("Third-Party Access").

B. Pay the Virginia Higher Education Procurement Consortium ("Consortium") one percent (1%) of all revenue received by Supplier from non-Consortium entities through Third-Party Access (the "PAC Annual Fee"). The PAC Annual Fee will be paid in exchange for marketing services provided by the University and the Consortium described in Section II.

C. Fully support this marketing relationship by promoting the availability of the Third-Party Access to non-Consortium entities; and

D. Provide quarterly reports detailing the amount of revenue received from non-Consortium entities through Third-Party Access.

II. The University will ensure the Consortium:

A. Promotes the Primary Agreement and Third-Party Access on its website and through other channels (e.g., conferences) to non-Consortium members; and

B. Maintains a Supplier-approved version of the Supplier's logo on the Consortium website.

III. Payment

A. Supplier shall remit the PAC Annual Fee to the Consortium no later than August 31st of each year. The University and Consortium will share the payments equally and allocate payments to the appropriate accounts.

If the Primary Agreement expires or terminates before August 31st, Supplier shall remit the PAC Annual Fee no later than 45 calendar days from expiration or termination date of the Primary Agreement.

B. Supplier shall remit the PAC Annual Fee by check in U.S. dollars. Checks will be made payable to the University of Virginia and sent to:

Procurement Office Manager
Procurement and Supplier Diversity Services
University of Virginia, Carruthers Hall
PO Box 400202
1001 N. Emmet Street
Charlottesville, VA 22904

Note ‘PAC payment’ on check.

IV. Notices

Any notice required or permitted to be given under this Agreement will be in writing and will be deemed duly given: (1) if delivered personally, when received; (2) if sent by recognized overnight courier service, on the date of the receipt provided by such courier service; (3) if sent by registered mail, postage prepaid, return receipt requested, on the date shown on the signed receipt: or (4) if sent by electronic mail, on the next business day of the receiver. All such notices will be addressed to a party at such party’s address as shown below.

If to the University:

University of Mary Washington
Melva Kishpaugh, Director of Procurement Services
procure@umw.edu
540-654-1084
1301 College Avenue
Fredericksburg, VA 22401

If to Supplier:

Ambassador Education Solutions
Steven Blicht, CEO

sblicht@ambassadored.com
445 Broadhollow Road
Melville, NY 11747

## ACCEPTANCE

| University of Mary Washington | Ambassador Education Solutions |
| --- | --- |
| Signed by: Melva A. H. Kishpaugh 9E0337A71D1845B... | DocuSigned by: Steven M. Blicht 42B7D49D671D45B... |
| Melva Kishpaugh | Steven Blicht |
| Director of Procurement Services | CEO |
| 7/21/2026 | 7/21/2026 |
| Date | Date |

Agreement #: UCPUMW 25-1828

**Exhibit E**

University of Mary Washington

# Ambassador Education Solutions' and University Gear Shop's Response to University of Mary Washington RFP #25-1828 for Campus Store Operations


**Marc Konesco**
Senior Vice President of Sales
mkonesco@ambassadored.com
Office 631-770-1010, ext. 1043
Mobile 804-837-9886

**Bill Boney**
EVP Sales and Strategic Partnerships
bill.boney@getugear.com
469-389-9989


AMBASSADOR EDUCATION SOLUTIONS

UGS UNIVERSITY GEAR SHOP

# Table of Contents

March 10, 2025

Lindsay Fare
University of Mary Washington
Procurement Services
Eagle Village Executive Offices, Suite 480
1125 Emancipation Hwy.,
Fredericksburg, VA 22401

# Thank you...

for the opportunity to respond to University of Mary Washington's (UMW's) Request for Proposal (#25-1828) for Campus Store Operations. We are excited to explore a partnership with UMW to power your course materials and merchandise programs through both an Online Bookstore and On-Campus Store, simplifying adoption, management, delivery, and access.

Ambassador Education Solutions (Ambassador) and University Gear Shop (UGS) are pleased to partner on a Hybrid Solution whereby Ambassador would power your Online Bookstore for course materials and UGS would power your on-campus spirit store, including general merchandise and logo wear. Our two companies bring tremendous synergies, working together each step of the way, doing all the heavy lifting, and delivering exceptional student experiences online and on-campus.

**What will UMW Get with Ambassador that You Won't with Another Course Materials Provider?**

**A Pricing Model Where You are in Control of the Student Sell Price and School Revenue:** we provide complete transparency when it comes to pricing, allowing you to choose your own commission, empowering you to set the price, and showing you exactly what we make.

**A Robust Course Materials Platform that Aggregates All Data Across All Your Systems:** Our award-winning Course Materials Platform, RODA, delivers all analytics though one platform for easier reporting and reconciliation. RODA verifies transactions and usage so you are not blindly relying on third-party invoices – we make sure you don't overpay!

**True Dedicated Inventory That's Available When Your Students Need It:** we warehouse your own inventory for your own students. It is never shared with other schools.

**How Does UGS Promote Your Brand and Student Engagement?**

UGS fully integrates into campus life by creating an exceptional in-store and online shopping experience throughout the entire campus community including students, faculty, staff, and alumni. **UGS's focus is on colleges and universities who want to build a unified partnership that enhances engagement, drives your brand awareness, and has a mutually beneficial and collaborative relationship with the campus store.**

UGS was created to meet the holistic needs of colleges and universities looking for a fully integrated and experiential solution to drive campus community, branding, and student engagement. Our concept is to create a mutually beneficial program that includes in-store staffing and business management, webstore solutions, department needs, and special occasion product procurement that is unique to you.

**Simple. Effective. Affordable. That is our course materials and merchandise pledge to UMW.**

Best Regards,
Marc Konesco
Senior Vice President of Sales
Ambassador Education Solutions
mkonesco@ambassadored.com | 804-837-9886

Bill Boney
EVP Sales and Strategic Partnership
University Gear Shop
bill.boney@getugear.com | 469-389-9989

University of Mary Washington
Procurement Services

**SEALED REQUEST FOR PROPOSAL (RFP)**

| | |
|---|---|
| **ISSUE DATE:** | February 7, 2025 |
| **RFP NUMBER & TITLE:** | RFP 25-1828; Campus Store Operations |
| **PROPOSAL DUE DATE & TIME:** | March 10, 2025 by 2:00 PM<br>NOTE: Proposals received after the due date and time cannot be accepted. |
| **PROPOSAL DELIVERY ADDRESS:** | University of Mary Washington<br>Procurement Services /Reference RFP 25-1828<br>Eagle Village Executive Offices, Suite 480<br>1125 Emancipation Hwy., Fredericksburg, VA 22401 |
| **WORK LOCATION:** | ☐ All Campuses ☒ Fredericksburg ☐ Stafford ☐ Dahlgren |
| **COMMODITY CODE(S):** | 20454, 71512, 71583, 71588, 78570, 92471 |
| **PRE-PROPOSAL CONFERENCE:** | ☒ Optional ☐ Mandatory ☐ N/A **DATE & TIME:** February 18, 2025; 10:00 AM |
| **PRE-PROPOSAL LOCATION:** | 1125 Emancipation Hwy., Fredericksburg, VA 22401 – Suite 480 Conference Room or Zoom (a link will be provided upon registration) |
| **CONTRACT OFFICER:** | Lindsay Fare **PHONE:** 540-654-1057 **EMAIL:** lfare@umw.edu |
| **PERIOD OF CONTRACT:** | Date of Award through June 30, 2031, with five (5) one-year renewal options or as negotiated. |

In compliance with this Sealed Request for Proposal (RFP) and to all the conditions imposed therein, and hereby incorporated by reference, the undersigned firm offers and agrees to furnish the goods/services in accordance with attached signed proposal or as mutually agreed upon by subsequent negotiation. The undersigned firm hereby certifies that all information provided in response to this RFP is true, correct and complete.

By signing this proposal, you are certifying that you are an authorized representative of the offering firm and that the firm's principals or legal counsel have reviewed the Request for Proposal General Terms and Conditions and any Special Terms and Conditions. Any exceptions to the General or Special Terms and Conditions must be clearly identified in your proposal. No exceptions can be taken to those General or Special Terms and Conditions that are mandated by law. If no exceptions are identified in your proposal, it is understood that the provisions will become a part of any final agreement.

**THIS FORM MUST BE COMPLETED AND RETURNED WITH PROPOSAL**

Name of Offering Firm: Ambassador Education Solutions

Address of Offering Firm: 445 Broad Hollow Road, Suite 206 Melville, NY 11741

DSBSD Certification No.: DSBSD # N/A Expiration Date: N/A

eVA ID: # VS0000207951 Tax ID: 20-0287423

Email: mkonesco@ambassadored.com Telephone: 804-837-9886

Website: www.ambassadored.com Fax: 631-770-1015

Submitted By (Print Name & Title): Marc Konesco, Senior Vice President of Sales

**Signature (In Ink):** Date: March 10, 2025

# SUBMISSION REQUIREMENTS

# 1. OVERVIEW:

## A. STATE THE FIRM'S LEGAL ENTITY NAME AND HEADQUARTERS ADDRESS.

Ambassador College Bookstores
dba Ambassador Education Solutions
445 Broad Hollow Road, Suite 206
Melville, NY 11747

University Gear Shop
3715 Garrett Road, #1008
Drexel Hill, PA. 19026

## B. PROVIDE FIRM'S W9 OR AT MINIMUM TAX IDENTIFICATION NUMBER (TIN)

AMBASSADOR TAX ID #: 20-0287423

UGS TAX ID#: 86-3937605

## C. PROVIDE THE NAME, TITLE, ADDRESS, TELEPHONE NUMBER, AND EMAIL OF THE INDIVIDUAL WHO WILL ACT AS THE FIRM'S DESIGNATED REPRESENTATIVE FOR PURPOSES OF THIS RFP.

Marc Konesco
Senior Vice President of Sales
Ambassador Education Solutions
mkonesco@ambassadored.com
804-837-9886

Bill Boney
EVP Sales and Strategic Partnership
University Gear Shop
bill.boney@getugear.com
469-389-9989

# 2. INTRODUCTION:

## PROVIDE AN INTRODUCTION OF THE FIRM AND ALL MAJOR SUBCONTRACTORS WHO WILL BE INVOLVED IN THE PERFORMANCE OF THE WORK. INCLUDE PRIMARY BUSINESS EXPERIENCE, LENGTH OF TIME IN BUSINESS, OWNERSHIP, OFFICE LOCATIONS, AND SPECIFIC LOCATION OF THE PRINCIPAL OFFICE FROM WHERE UMW WORK WILL BE PERFORMED AND ANY OTHER INFORMATION OF AN INTRODUCTORY NATURE.

We are proposing a Hybrid model whereby Ambassador would manage your Online Bookstore for course materials and UGS would manage your on-campus spirit store for merchandise and other items. This is a collaborative effort.

### AMBASSADOR HISTORY

Established in 1973, Ambassador College Bookstores, Inc., dba Ambassador Education Solutions, simplifies the adoption, management, delivery and accessibility of all course materials. Course materials collaboration, affordability, simplicity, and transparency have always been the cornerstone of our course materials model. As more traditional, non-profit institutions have approached us over the years trying to tackle these challenges, we realized that the core competencies we built to originally serve the needs of career schools ideally translated to the traditional education market. Today, we support 800+ campuses comprising 2-year and 4-year colleges and universities, career schools, community colleges, graduate schools, medical schools, K-12 schools, and more. Ambassador will conduct all work from our corporate headquarters in Melville, NY.

## AMBASSADOR MISSION

Our mission is clear - to simplify the adoption, management, delivery, and access of all course materials, and to do so in a way others simply can't match. Schools trust Ambassador to improve course materials accessibility, lower operational and financial risks, and deliver usage and cost transparency.


## AMBASSADOR'S PARTNERSHIP APPROACH

Ambassador prides itself on being the very definition of a partner and an innovator. Everything we do from a client perspective centers around:

- ✓ **Flexibility:** you choose your path and model(s) that best meet your needs, and we guide you based on decades of experience and expertise.
- ✓ **Collaboration:** we listen to you and get to know your challenges and goals intimately.
- ✓ **Advocacy:** your requests don't get caught in the corporate ladder. Our Client Services team has the authority to get things done, backed by a direct line of communication to our executives who are engaged in each client account.

Relieving the burden that course materials management can have on a school, Ambassador manages the entire course materials process. We do all the heavy lifting so you don't have to, and we are your eyes and ears into best practices and trends so you can better support your faculty and students.

At Ambassador, we are known for forging client relationships whereby we:

- Act on their behalf with publishers and other technology vendors
- Help them understand the data behind their course materials programs
- Shape our product and technology roadmap to address students' needs today and tomorrow

> *"We knew going in that Ambassador was committed to our success, but it's one thing to hear it and another to experience it. From the very beginning, Ambassador has put our students and faculty first. They have delivered a solution that merges affordability with innovation, and they have been fully transparent every step along the way. Without a doubt, Ambassador goes above and beyond to ensure a high level of customer service."*
>
> UAA UNIVERSITY of ALASKA ANCHORAGE.

**UNIVERSITY GEAR SHOP**

University Gear Shop (UGS) was established as a Limited Liability Company at 3715 Garrett Road, #1008, Drexel Hill, Pennsylvania 19026 with the expectation of rapid expansion in the higher education retail industry.

**UGS Business Description**

University Gear Shop is a dynamic, modern, and on-trend merchandise fulfillment partner. Our target market is mid-sized, private colleges and universities that want personal service, and a boutique feel yet have the corporate power and energy to make a bold statement and drive collegiate branding. UGS will provide products that serve the mission and values of the institution, including books written by faculty authors as well as providing products for clubs, student groups, faculty groups and academic departments. UGS welcomes the opportunity to host events at the Gear Shop and will collaborate with the institution to advertise and market the events.

**UGS Summary**

UGS will create and meet the holistic needs of University of Mary Washington and look to fully integrate solutions that drive campus community, branding, and student engagement. We will create and deliver:

- A mutually beneficial program built on trust, character, and integrity
- A financially beneficial partnership for University of Mary Washington
- Leading retail in-store and online e-commerce solutions
- Custom-curated product collections for students, staff, faculty, and alumni
- Collaborative partnership with the campus community
- Efficient processes that produce tangible results and cost savings
- A world-class branding strategy that promotes University of Mary Washington
- Outstanding customer service with a smooth shopping experience at every touchpoint
- Seamless integration with Ambassador, delivering a single vendor experience

We have expertise in retail and technology solutions and can also:

- Provide direct sales to student groups, clubs, departments, administration, and athletics
- Create online and in-person pop-up shops to fit your needs
- Partner with University of Mary Washington for services such as mail room and print shop operations

**UGS Unique Characteristics and Professional Qualifications**

The University Gear Shop culture is the characteristic that most uniquely sets us apart from our competition. We are committed to a positive culture that focuses on customers' needs and empowers staff. Our motivated staff members have a clear understanding of the goals and plans, feel secure in taking the initiative, and collaborate on ways to drive your brand.

Our culture is defined by these core values:

**We build customer relationships first** and sell merchandise second. Listening to the needs of our customers and acting on their comments and feedback builds loyalty and repeat customers.

**Empathy** puts us in the shoes of our customers and helps us understand their wishes, problems, and needs.

**Greeting every customer** as they enter the store creates the first connection point and saying thank you is a must to show that we value our customers as they leave the store.

**Constructive conversations** happen by using open-ended questions. Instead of asking the customer, "Can I help you today?", we ask, "How can I help you today?" This turns a quick, "No," into a discussion.

**Time is valuable** and waiting in line to check out is not acceptable. On busy days, we have an alternative method of checking out customers using mobile technologies.

Through our continuous improvement efforts, we build and maintain efficient processes that produce tangible results in time and cost savings. We adopt a mindset of problem solving, teamwork, and top-line growth, allowing us to create more value for you. The drive to keep improving allows our team to have the capacity to pursue innovation and growth and this makes us professionally qualified to deliver on our mission to Mary Washington University.

We incorporate lean principles of evolutionary change and continuous process improvement rooted in a fundamental respect for people. Our teams regularly examine business processes and industry changes to simplify and accelerate the path to delivering value to our customers. This creates a self-reinforcing feedback loop between the UGS team and our customers that helps identify and mitigate barriers to progress and not only create shared success but also keeps UGS on the cutting edge of industry evolution.

# 3. QUALIFICATIONS OF THE FIRM:

**DESCRIBE HOW YOUR FIRM'S OVERALL EXPERIENCE DEMONSTRATES YOUR ABILITY TO SUCCESSFULLY COMPLETE THE STATEMENT OF NEEDS. PROVIDE A DETAILED LIST OF SERVICES YOU HAVE PROVIDED TO CLIENTS OVER THE PAST THREE YEARS WHICH ARE SIMILAR TO THOSE REQUIRED BY UMW.**

**Ambassador's approach is simple:**

- ✓ Easy, affordable course materials access for students
- ✓ Streamlined course materials distribution and reconciliation for schools

### TAILORED SERVICES MODELS TO MEET YOUR NEEDS AND GOALS

Ambassador's service models offer a level of flexibility and collaboration like you've never seen.

- **Online Bookstore:** branded with your logo and colors, students can find and order materials anywhere, anytime.
- **All-In Inclusive Access and Equitable Access:** students automatically receive all course materials in time for the first day of class.
- **Hybrid Bookstore:** students can easily order materials from your online bookstore, while still connecting with peers and purchasing ancillary items at the on-campus bookstore.
- **Bulk Fulfillment:** all print course materials are aggregated and delivered in bulk to your school for distribution to students.
- **Ambassador Flex:** combine any or all of Ambassador's service models to meet your school's unique requirements, by course, by program, and by institution.

## AMBASSADOR BY THE NUMBERS

**5 Decades of Experience**
**99% Customer Retention**
**1000+ Technology and Content Partners**
**800+ Campuses**
**100% In-House Technology Team**
**250+ Inclusive & Equitable Access Programs**

## WHAT DIFFERENTIATES AMBASSADOR IN THE MARKET?

### Collaboration

We are an **ally to our clients** as they continually praise our teams for their **professionalism, open communication, and genuine care**. We empower you to steer your vision, backed by our expertise.

- We have **50 years of experience** supporting higher education institutions.
- We maintain a **99% client retention rate**.
- We have been on the forefront of automatic fulfillment programs for **20+ years.**
- Our client services specialists have an average tenure of **19 years.**
- **85% of our staff** is dedicated to directly supporting our clients.
- We tailor our service models to each school's specific needs.

### Affordability

Our unique pricing model puts your school in the driver's seat -- **you determine pricing**, while we provide transparency and controls. We have helped schools and students **save $141 million** over the last three years.

- Our "bottom up" pricing means **you set the price and choose your commission**.
- Our No-Duplicate functionality backs out duplicates and credits items for dropped students, which has **saved schools 10%-40%** in print and digital materials costs.
- We **hold prices steady** so students who purchase later are not penalized.
- Almost everything comes from one channel, drastically **reducing shipping charges**.
- Our financial controls verify usage and fees so **you don't overpay!**

### Simplicity

Unlike any other technology on the market, our Course Materials Platform RODA brings everything together through one centralized platform.

- We warehouse **dedicated inventory for your school,** which is not shared with other schools.
- We help faculty **find, evaluate and compare** materials and pricing.
- We manage and maintain all system and platform integrations, **relieving stress on your IT team**.
- We **streamline your publisher partnerships,** filling in all the data and service gaps.

### Transparency

We prioritize **data accuracy and visibility**, aggregating massive amounts of course materials transaction, financial, program, and usage data.

- We eliminate time-intensive manual reporting efforts.
- We present financial data in applicable ways so schools can **better understand costs**.
- We track and validate transactions, usage, and fees so **you know exactly what you owe**, no more guessing or paying inaccurate invoices!

UGS UNIVERSITY GEAR SHOP

University Gear Shop fully integrates into campus life by creating an exceptional in-store and online shopping experience throughout the entire campus community including students, faculty, staff, and alumni. Our focus is on small to mid-size private universities who want to build a unified partnership that enhances engagement, drives your brand awareness, and has a mutually beneficial and collaborative relationship with the campus store.

UGS will create a boutique retail experience tailored to the University of Mary Washington's unique needs and mission. We create a reimagined modern shopping experience with stylish, on-trend products and brands that capture attention that will highlight the University of Mary Washington brand in all settings and for all occasions. UGS is part of a long-standing global distribution network, specializing in driving branded merchandise and apparel sales through marketing, social media, events, and technology/e-commerce solutions.

University Gear Shop is a division of Altitude Group, PLC with headquarters in Sheffield, UK and Philadelphia, PA. Altitude Group was founded in 2004, and operates the leading global marketplace within the $23 billion branded merchandise and apparel industries.

UGS was created to meet the holistic needs of colleges and universities looking for a fully integrated and experiential solution to drive campus community, branding, and student engagement. Our concept is to create a mutually beneficial program that includes in-store staffing and business management, webstore solutions, department needs, and special occasion product procurement that is unique to the University of Mary Washington.

**Our Mission**

**Drive community engagement and brand recognition by delivering high-quality branded merchandise with passionate, world-class service.**

Our mission statement defines our key objectives, guides our decision-making, and is felt within every aspect of our organizational culture. We will partner with the leaders at University of Mary Washington to increase engagement by creating a fully interconnected campus experience that captures University of Mary Washington pride and fosters lifelong college loyalty. With over 75 years of higher education retail experience and 150 years of combined experience in branded merchandise and marketing, our team members excel at building relationships, delivering on-trend, high-quality merchandise, and increasing brand awareness that will have community members coming back for more and telling their friends and family about the University of Mary Washington Gear Shop.

**Our Value**

UGS connects with students, staff, faculty, and alumni in ways that increase campus and online relevance and drives engagement. We pride ourselves on our ability to listen to the campus community and individual customers to benefit from their wisdom, and act upon their feedback and input.

**Our Purpose**

Our purpose is to passionately assist colleges and universities in the growth and promotion of their brand through a customized strategic partnership.

## EXPERIENCE

University Gear Shop is a dynamic, modern, and on-trend merchandise fulfillment partner. Our target market is small to mid-sized, private colleges and universities that want personal service, and a boutique feel yet have the corporate power and energy to make a bold statement and drive collegiate branding.

Marywood University is a private, Catholic, liberal arts university with approximately 2,600 students. Like the University of Mary Washington Store, Marywood University's Gear Shop is in the student center. It is the hub of activity, and the Gear Shop is a welcoming environment for all.

Since opening our doors, some of the comments we have received are:

> "I stopped by before the semester started, and it looked amazing! Love that you can now order online."

> "When are we going shopping?"

> "Looks Beautiful!!!"

Our team of dedicated, motivated, and innovative professionals have met the needs of students and faculty through our partnership with Ambassador, by having the right school supplies and merchandise in stock and providing the conduit for textbook distribution. We've worked with administration and organizations by procuring top-quality branded merchandise for special events, and we've developed flash sale websites for sports teams and department fundraisers.


UGS will provide products that serve the mission and values of University of Mary Washington including trade books written by faculty authors. UGS welcomes the opportunity to host book signings at the University of Mary Washington Gear Shop and will collaborate with University of Mary Washington to advertise the events.

## MANAGEMENT & PHILOSOPHY

World-class customer service provides a seamless shopping experience at every touchpoint. The goal is to ensure that our customers are satisfied with the service they receive and their purchase. At UGS, the customer is our top priority. That is why we developed a World Class Customer Service experience:

**We build customer relationships first** and sell merchandise second. Listening to the needs of our customers and acting on their comments and feedback builds loyalty and repeat customers.

**Empathy** puts us in the shoes of our customers and helps us understand their wishes, problems, and needs.

**Greeting every customer** as they enter the store creates the first connection point and saying thank you is a must to show that we value our customers as they leave the store.

**Constructive conversations** happen by using open-ended questions. Instead of asking the customer, "Can I help you today?", we ask, "How can I help you today?" This turns a quick, "No," into a discussion.

**Time is valuable** and waiting in line to check out is not acceptable. On busy days, we have an alternative method of checking out customers using mobile technologies.

## WORK PLAN:

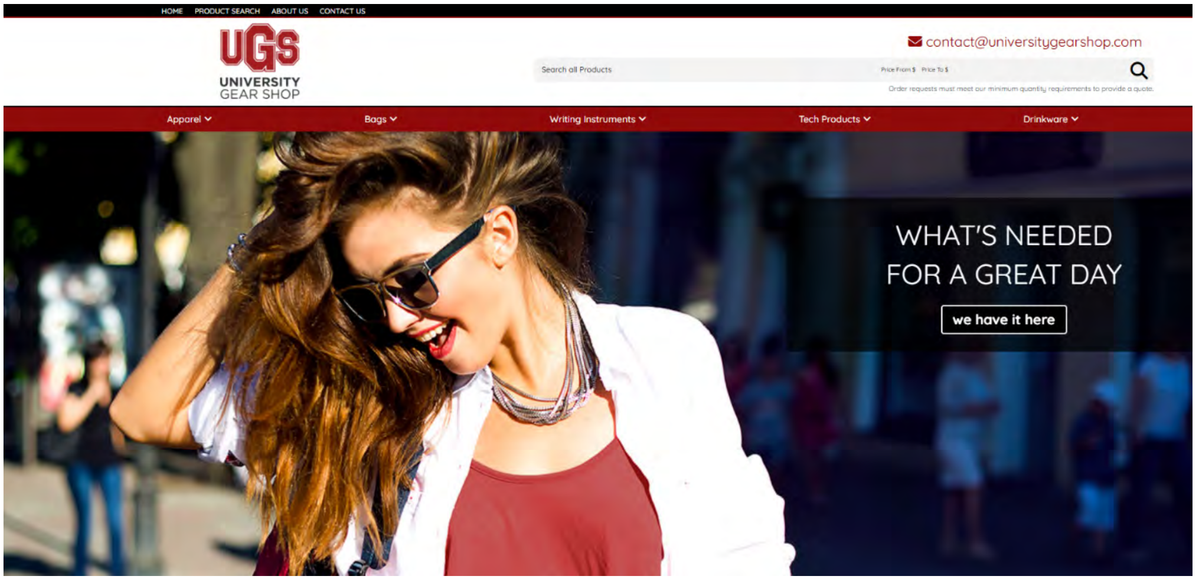
### The UGS Advantage

UGS is an innovative and creative organization that brings new ideas and programs to the higher education retail space. Our team members will listen to your needs and help identify the goal you have set out to achieve. Then we will work through product selection, decoration creation, and order process to ensure that your needs are met on time, within budget, and collaboratively driving toward goal attainment.

We would be excited and delighted to add value to the University of Mary Washington campus through collaboration on the following:

### Direct-2-U Branded Products

UGS is an extension of your branding team. We will ideate and brainstorm with faculty, administrators, alumni groups, and student organizations on the right branded products that speak to your brand and what makes the University of Mary Washington special. Whether it is specialized products that speak to the class of 1988 for an alumni event, a University of Mary Washington cap for incoming students at orientation, or a custom product to drive your fundraising or advancement efforts, we are here to serve. With access to over one million products, there is no doubt we will find the right fit for your event.




**Pop-Ups**

Campus activities are an important part of the overall student, staff, faculty and alumni experience and we understand the value of collaborating with your teams to bring University of Mary Washington branded merchandise to these events. Because our point-of-sale system is cloud based, we can go anywhere that wi-fi or cellular connectivity is available. Whether it's a basketball game, another athletic event, or an off-campus event, we'll be there to assist with an assortment of University of Mary Washington branded merchandise.

**Graduation Headquarters**

UGS will provide all the graduation services needed for the University of Mary Washington. We will plan and execute graduation fairs that consist of cap and gown measurement and invitation and announcement orders. Additionally, we will be on-hand the day of graduation to assist with regalia needs including hoods, tassels, and mortar boards. This is a very special day for the graduate – possibly a once in a lifetime experience. UGS will create an experience that allows the new UMW alumni to acquire their first alumni merchandise along with other gifts and graduation products you would expect at such an event.

**Flash Sales**

What better way to create excitement and promote the UMW brand than with a limited-time flash sale? UGS will partner with campus clubs, organizations, student groups, intramural sports, and the like to create websites that are specific to the organization. These events have proven to drive interest and revenue. In some cases, the flash sale event has been used as a fundraiser. That's right, UGS will partner with the organization for the design and sale of the item(s) and donate a portion of the proceeds either back to the organization or to a charity of their choice.

**Acceptance Gear Package**

It is an exciting day when a future Eagle receives their acceptance letter. It would be even more exciting if they received their first University of Mary Washington branded item along with their acceptance letter. UGS will partner with the Office of Admissions to create a gear package as a supporting piece to the letter of acceptance. Statistics show that when a potential student with multiple offers receives a branded gift with their acceptance letter, they are more than 60% likely to attend the university. UGS's brand strategy for University of Mary Washington can assist in driving enrollment.

**GSAB (Gear Shop Advisory Board)**

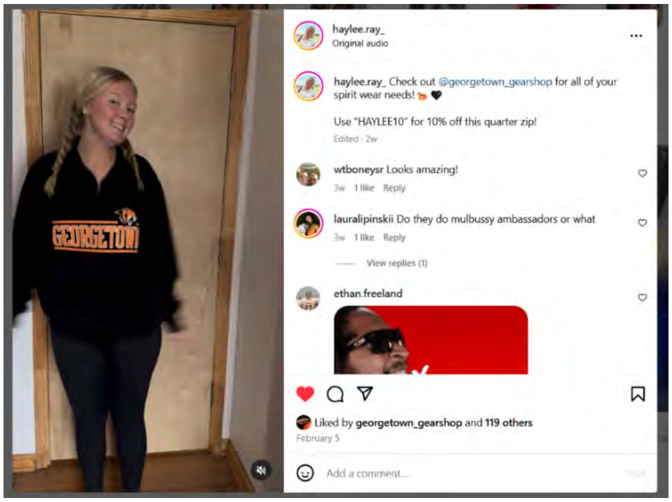
UGS understands we must listen and apply learned wisdom from UMW stakeholders to better serve our constituents. That is why we will establish a University of Mary Washington Gear Shop Advisory Board. The purpose of UMWGSAB will be for us to listen and learn where we have the biggest opportunities to not only better serve the community but also what brands or merchandise, we should offer. This board is an integral piece of our success as we gain knowledge on what our customers would like to see from their gear shop.

**UMW Alumni Events**

The largest addressable market at institutions of higher learning are alumni. UGS recognizes this opportunity and therefore works with the Office of Alumni Relations to procure a collection of merchandise for alumni and reach out to alumni with flash sales, e-catalogs, merchandise brochures and alumni event planning. The UMW Gear Shop will not be just a place for getting the latest in UMW gear. The UMW Gear Shop will be a hub where activities and events can take place. From student engagement to alumni events and social events, the UMW Gear Shop will be a multi-purpose venue.

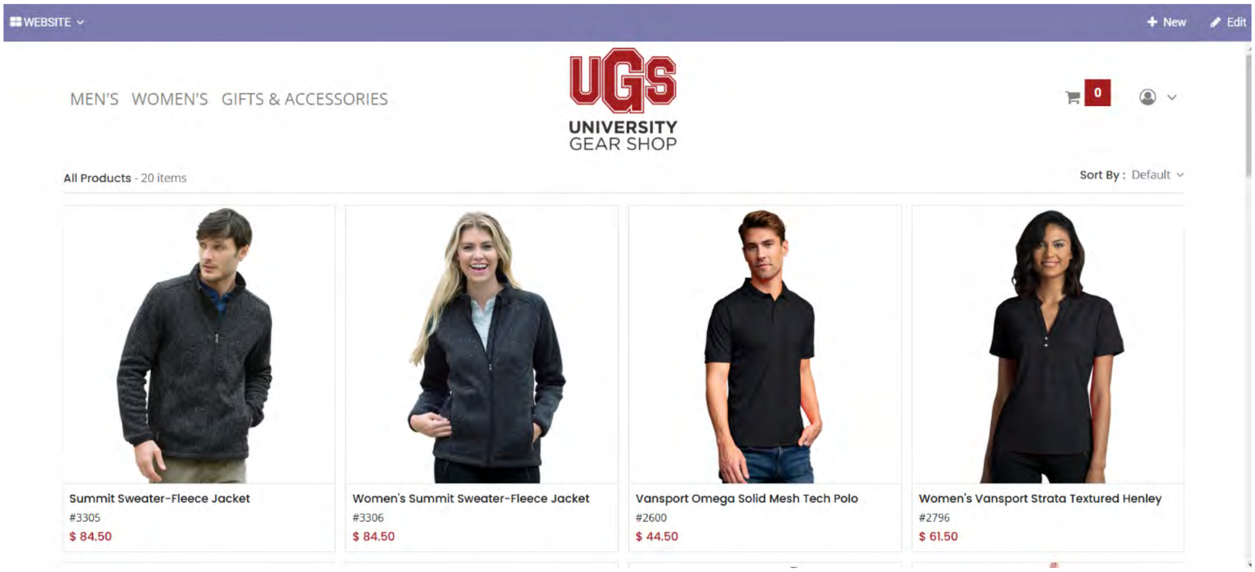
**Brand Ambassadors/Influencers**

In today's world of social media marketing, brand ambassadors, also known as influencers, are critical to driving brand awareness. UGS will seek out students who are interested in becoming University of Mary Washington Gear Shop Influencers. We will supply the influencer with social media channel outlets where they will promote UMW branded gifts and apparel. This added level of marketing will expand the reach of the UMW brand beyond the walls of the institution and into the world of social media.




**Print-On-Demand**

University Gear Shop is excited to offer a print-on-demand service for branded merchandise through our eCommerce platform, allowing for seamless access to customized UMW products tailored to athletics, alumni, and UMW employees. This service empowers each group to find unique, high-quality items that reflect their specific UMW pride, from personalized athletic gear to alumni memorabilia and employee apparel. The flexibility of print-on-demand means that UMW fans can access an extensive range of designs and product types without the need for large pre-orders, ensuring that everyone can represent UMW in a way that feels personal and meaningful.




# 4. QUALIFICATION OF THE STAFF:

**IDENTIFY THE STAFF MEMBERS WHO WILL PROVIDE THE SERVICES REQUIRED BY THE PROPOSAL, INCLUDING YEARS AND TYPE OF EXPERIENCE FOR EACH PERSON. EXPERIENCE SHOULD INCLUDE NUMBER OF YEARS AT CURRENT FIRM AS WELL AS ALL PRIOR SERVICE.**

### TEAM AMBASSADOR

One of our biggest assets at Ambassador is our team. From our executive branch to our client services professionals, technology gurus, traffic managers, warehouse personnel, and merchandise managers, every Ambassador employee is dedicated to providing affordable course materials and superior customer service.

### Steven M. Blicht - Founder and Chief Executive Officer ("CEO")

Having managed Ambassador since its inception, CEO Steven M. Blicht has an intimate understanding of the education market and is always looking for ways to strengthen the company's capabilities and services in anticipation of clients' needs. He stands as a respected authority in the course materials industry having worked with school presidents and leaders to create programs that mirror their missions and goals. Steven sits on the Board of Directors of Imagine America Foundation, an organization that provides scholarships to deserving students. Previously, he practiced law at a prominent law firm specializing in corporate and commercial matters. He is a graduate of Hofstra Law School and is admitted to practice law in New York, New Jersey and Florida.

### Richard Kolberg - Chief Financial Officer ("CFO")

Richard ("Rich") Kolberg brings a wealth of experience to the CFO position. He has spent the large part of his career strategizing and guiding companies. Rich began his career at professional services firms followed by financial leadership roles at eCommerce, IT Services and SAAS providers. He is well versed in the financials of outsourcing course materials program operations and an asset to Ambassador and its clients. Rich has been Ambassador's Chief Financial Officer since November 2015. He earned a Bachelor of Science in Accounting at SUNY Albany and is a Certified Public Accountant in the State of New York.

### Hercules Bontzolakes - Chief Technical Officer ("CTO")

Hercules ("Herc") Bontzolakes has extensive experience in global IT Strategy, IT Architecture, and IT Design & Implementation. He launched his career as a software developer for global eCommerce agencies and went on to spend eight years in senior technology positions at The Princeton Review. Herc joined Ambassador in 2009 as VP of Technology before being promoted to CTO. His extensive IT knowledge, coupled with his experience in the educational space empowers him to imagine, shape and lead Ambassador's technology initiatives. Herc holds a B.A. in Computer Information & Technology from Iona College.

### Bruce Schneider - Vice President of Business Engineering

Bruce Schneider has more than 25 years of experience working with institutions and organizations to integrate technologies that allow them to operate more effectively and efficiently. Bruce collaborates with schools to improve the student experience at all levels of the course material supply chain. Previously, Bruce was the Director of Software Development at Centris Group and Senior Technical Lead at Sybari Software, now the Forefront group of Microsoft. He is a sought-after speaker, presenting at events hosted by CECU, ABHES, ACCET, CAPPS, CSPEN and ACHE, among others. He has been published in Career Education Review, eCampus News and EDUCAUSE Review and is a graduate of SUNY at Stony Brook.

### Michelle Leontis - Vice President of Product Management

Michelle Leontis brings more than 20 years of project and program management experience leading enterprise-wide efforts to launch new processes, products and solutions. Her education background stems from more than a decade at The Princeton Review. At Ambassador, Michelle leverages her industry insights and acts as a trusted voice of the client, focusing on new product initiatives and integrations with an eye toward high quality student and client experiences that are customizable, configurable and scalable. Michelle has been published in eCampus News and Career Education Review, and she is a graduate of SUNY Stony Brook.

### Marc Konesco, Senior Vice President, Sales

Marc has a long tenured run in school, technology, and publisher management, giving him unique insights across all facets of higher education. He has held leadership positions at publishing, online learning, and enrollment marketing companies, and led strategy and operations for a career school. At Ambassador, he is charged with helping schools understand and deliver effective, affordable course materials models that adapt to the changing needs of students. Marc has served in countless volunteer positions and on educational boards, and he is a graduate of Miami University and Virginia Commonwealth University.

### Rob Heller, Vice President of Sales

Rob Heller is an expert when it comes to course materials services. Over his 30+ year career, he has worked with colleges, universities, and bookstores to create and enhance student and school experiences. He is well versed in the evolution of the school bookstore as well as course materials and inventory management, and he has a wealth of insights when it comes to operations and efficiencies. At Ambassador, Rob helps schools and stores implement Online Bookstores, Inclusive and Equitable Access programs, and other models that meet their financial objectives, overcome IT challenges, and are tailored to students' needs. Rob is a published novelist and announces athletic events for Coastal Carolina University and the University of North Carolina. Rob's voice has been heard at the College Football Playoffs, March Madness, and National Championship games. He is a graduate of Clemson University.

### Teresa Engel, Vice President of Business Development

Teresa has an impressive 25+ year career in executive leadership roles across higher education and K-12. She has worked closely with for-profit and non-profit colleges and universities, propelling their growth strategies and student success initiatives. At Ambassador, Teresa collaborates with new and existing client schools to develop affordable course materials programs, as well as establishes and oversees strategic partnerships with publishers and suppliers to ensure students have easy access to a massive collection of course materials. Teresa is the recipient of numerous leadership awards, serves as an executive coach, and is highly regarded in her local community as an entrepreneur, former restaurant owner, and town business leader. She is a graduate of Missouri State University.

### Samer Rabie - IT Support Manager

Samer joined Ambassador nearly two decades ago and has been instrumental in helping schools navigate the course materials on-boarding and implementation process. Samer not only leads the IT team that supports schools each step of the way, but he also is heavily involved in all implementations, understanding the necessary integrations and specific technical requirements for each institution. He is diligent in his communication with each school's designated implementation team and personally makes sure that everyone involved is properly informed and comfortable with the integration process and timeline. Samer also works with required third-party organizations on behalf of clients, ensuring that schools' best interests are always being met. Samer holds a Bachelor of Science in Electrical/Computer Engineering and Computer Science.

### Madeline Lauro - Senior Client Services Manager

Madeline Lauro has held customer service roles for more than 20 years. As a co-manager overseeing the operations of Ambassador's Client Services Department, she handles field sales support and customer management, leveraging her impressive listening, creative thinking and resolution skills. She manages and maintains strategic partnerships with both internal and external business units. Madeline was instrumental in the development of Ambassador's first major account consisting of 95 locations and has contributed to the successful transition of more than 25 accounts to Ambassador. Madeline earned a Bachelor of Arts Degree in Special Education from CUNY Brooklyn College.

### Terry Eschmann - Senior Client Services Manager

Terry Eschmann is Ambassador's longest tenured team member. With more than 40 years of experience servicing and collaborating with Ambassador's clients, Terry has seen the evolution of the course materials industry first-hand and helped her clients adapt accordingly. She has gained a keen understanding of school operations, roles and goals, as well as a great sense of compassion for working with students and faculty. As a comanager overseeing the operations of Ambassador's Client Services Department, she manages all the behind-the-scenes logistics to make each implementation and term launch a success, as well as support the ongoing needs of every stakeholder.

### Jennifer Sloan-Tocci - Client Services Manager

Jennifer works closely with Ambassador's clients, overseeing their course materials procurement and fulfillment, as well as collaborating with publishers on their behalf. During her 13-plus years with the company, she has become a trusted ally for her clients and expert mentor for her staff. As a previous small business owner with 25 years of client service experience, she understands the depth and importance of client relationships, the urgency behind client requests, and what it means to put clients first.

**UGS TEAM**

The Gear Shop will be a focal point of the University of Mary Washington campus. As such, UGS understands that our team members are truly brand ambassadors, offering excellent customer service at every opportunity. We will take a planned approach to:

- Define our hiring goals based on store hours, special events and the school academic calendar, and identify the ideal candidates for each role
- Create a recruitment campaign to ensure candidates know about our company culture, values, expectations, and benefits of working at the University of Mary Washington Gear Shop
- Review applications, pre-select, and interview highly qualified candidates, which fit our customer service culture
- Select the candidates that will fit the culture and have the experience and aptitude to learn our policies and procedures. By hiring for culture fit we create a positive work environment, and our staff members are truly engaged and supportive of the team, the college, and the goals of the Gear Shop.
- On-board and train all team members on customer service, merchandise, processes, policies, and procedures of the organization and Gear Shop.

UGS encourages students to apply for open positions and will schedule work hours to ensure that there are no conflicts with classes and academic studies. Supporting the college and staff members of the University of Mary Washington Gear Shop, we have a corporate team that is highly experienced in their roles and dedicated to driving success:

**Bill Boney, EVP, Sales & Strategic Partnerships**

Bill began his college bookstore career in 1993 with Wallace's Book Company as an assistant manager at the University of Texas Wallace's Bookstore in Austin, Texas. He continued with Wallace's Book Company to also manage and operate the bookstore at Texas Tech University in Lubbock, Texas. Bill was hired by Follett Higher Education Group in 1996 to manage and operate the Georgia State University Bookstore in Atlanta, Georgia. Over the course of the next 24 years, he held the positions of Store Manager, Training Store Manager, Store Director, Regional Manager, and Group Vice President. Bill was hired by University Gear Shop to lead our operations as the VP of Retail Operations. Bill's focus on customer and client services are the cornerstones that have marked his tenured career in the industry. Bill has a passion for people and continues to innovate in service and operational excellence to our current and future clients.

**Marie Miller, Executive VP of Operations and Organizational Development**

Marie Miller is a diverse, results-driven professional, having started her career in the retail industry leading customer service teams and operations for JC Penney and Kohl's department stores. Earning BS and MA degrees in political science, Marie expanded her education by earning two AA degrees in computer science. Her career then shifted to the branded merchandise industry providing customer software and systems support, and team leadership. Marie has a passion for serving the needs of the customer, organizational development, business analysis, project management and creating operational efficiencies. These skills came together in a new role at AIA Corporation as Director of Continuous Improvement and Education where she facilitated collaborative process improvement kaizen events and changed implementation focused on the needs of the customer. As the EVP of Operations and Organizational Development, Marie collaborates with the University Gear Shop leadership team to define, communicate, support, and achieve established mission, vision and values that drive stakeholder satisfaction and revenue goals. She is also focused on sustaining an evolutionary company culture by leading changes, coaching staff and leaders, and facilitating communication and problem-solving throughout the organization.

**Melissa Colf, Regional Manager**

Melissa started her career in retail very early, in high school.  By graduation, she was promoted to Store Manager, as her passion is customer service.  While attending college, Melissa worked full time as a Store Manager.  It was in her second semester that she found herself spending more and more time in the bookstore between classes.  After graduation, Melissa would still help the bookstore and work when they needed extra help.  While most of Melissa's experience was in retail stores with a sales volume of up to 5 million annually, she did spend time as a District Manager overseeing 25 stores.  Melissa applied for the Store Manager position at the very same college bookstore she attended. Melissa began her College Bookstore career as a Store Manager at Finger Lakes Community College in Canandaigua, NY. She revitalized the Course Supply side of the business and re-established many relationships with faculty and staff.   Melissa grew the school brand in her time there, remarked the store frequently and showcasing the apparel and gift items.   Melissa Joined UGS in July of 2023 as a Store Manager of the St John Fisher University Gear Shop. UGS quickly saw her skill set was beyond that of a Store Manager and was promoted to Regional Manager in 2024.

**Megan Beisser, Vice President of Marketing**

A marketer's mind. An artist's eye. Megan combines the best of both worlds as she leads her talented team of account managers, designers, writers, and project managers to build the most effective and impressive projects imaginable. Initially kicking off a 20-plus year career as a graphic designer in the financial services world at American Business Financial Services, Megan's next steps would be as an art director of several B2B magazines at the North American Publishing Company. She continued to flesh out her well-rounded skillset as the head of digital projects featuring the world's top names in dermatology and eye health at Bryn Mawr Communications. Today, as the VP of Marketing at University Gear Shop, Megan provides brand management leadership, strengthens the market position of UGS, and leads a team of highly skilled marketing professionals to meet the online and brick-and-mortar needs of each Gear Shop.

**Nick Stoffell, US Director of Finance**

Nick is a Chartered Accountant, licensed by the Institute of Chartered Accountants in England and Wales. He has worked in several progressively advancing accounting and finance roles during his career, spending the last ten years in managerial roles. He has worked at private and public companies in various sectors including services, infrastructure investment management and logistics. Nick spent eight years at Inchcape Shipping Services during which time he managed its ERP division, business partnered with the COO and led the Group Management and Reporting function, responsible for the consolidation and reporting of circa 70 international entities. More recently, Nick spent three years at Hyperscale Data Center start-up Yondr responsible for implementing robust controls and procedures for its expanding EMEA division managing both accounting and debt. His experience includes IFRS accounting, tax, financial reporting, forecasting and business partnering.

**Additional Support**

In addition to the core group of resolute team members, University of Mary Washington will benefit from an exceptional human resources, technology and account management team that will support every facet of the business and ensure a successful partnership.

# 5. WORK PLAN:

**THE WORK PLAN MUST CONTAIN A COMPREHENSIVE DESCRIPTION OF THE GOODS AND/OR SERVICES INCLUDING THE FOLLOWING ELEMENTS:**

**A. GENERAL – THIS SECTION OF THE PROPOSAL MUST CONTAIN SUFFICIENT DETAIL TO CONVEY THE METHODOLOGY OR WORK PLAN CONTEMPLATED FOR USE. FIRMS MUST DESCRIBE HOW THE SERVICES LISTED IN THE STATEMENT OF NEEDS SHALL BE PERFORMED.**

### AMBASSADOR'S ONLINE BOOKSTORE SOLUTION

Ambassador's state-of-the-art, branded, customizable Online Bookstore is designed with the student at its core, making the process simple and intuitive. Everything is integrated into one easy-to-use site for every student – including course information, course materials titles, financial aid, and school vouchers. Once logged in, a student's course materials list is automatically populated and he or she can choose from multiple purchasing options, including new, used, rentals, and digital. The Online Bookstore is accessible 24x7x365 via all web browsers and devices, and it is ADA and PCI compliant.


### Branded to Your School

Your dedicated Online Bookstore will be customized and branded with your logo and colors. The URL for the Online Bookstore is specific to your school (www.yourcollegebookstore.com). We don't mention Ambassador in the URL or on the site, unless requested by you.

### Convenient, Mobile-Friendly

With over 99% uptime, our Online Bookstore solution empowers students to order materials when it is most convenient. Ambassador's Online Bookstore features a mobile-first, responsive layout, providing users with a mobile-friendly experience. There is no difference in functionality between using the Online Bookstore on a laptop/desktop or mobile device. A shortcut "app" icon to our Online Bookstore can easily be added to the home screen of any tablet or cell phone.

### Intuitive Design

The Online Bookstore delivers a simple and personalized shopping experience. The flow of the ordering process is logical, the steps are clear and easy to follow, and confirmation is timely and informative. Students can simply login using Single Sign-On via their student portal or Learning Management System. Self-help instructions are provided to assist the student in navigating each page. These instructions may be customized to meet your school's specific requirements.

Custom messaging and notifications are provided throughout the process to help students make informed decisions and to set clear expectations on delivery. Students will receive an email notifying them that the Online Bookstore is open, as well as reminder emails if they have not yet purchased materials.

## B. DELIVERABLES – FULLY DESCRIBE ALL OF THE DELIVERABLES TO BE SUBMITTED UNDER THE PROPOSED CONTRACT.

UGS will supply all deliverables pertaining to the on-campus store. Please refer to this proposal as it describes, in detail, all the deliverables and services provided by University Gear Shop.

Ambassador will supply all deliverables pertaining to the Online Bookstore for course materials, including access to RODA, our Course materials platform, BookAT, our online adoption tool, and all technologies. We support your school, staff and students across the entire course materials lifecycle:

- ✓ **Adoption:** our BookAT online adoption workflow tool makes it easy for faculty to find, compare, adopt and re-adopt titles in a timely manner.
- ✓ **Management:** our Course Materials Platform, RODA, aggregates data across all your systems, streamlining transactions, verifying fees, and consolidating invoices.
- ✓ **Delivery:** we will source all items on your booklist; our dedicated inventory approach ensures students receive print and digital materials when they need them.
- ✓ **Access:** we maintain all integrations for Single Sign-On access, and students have a direct line of support to our team and FAQs if they need help.

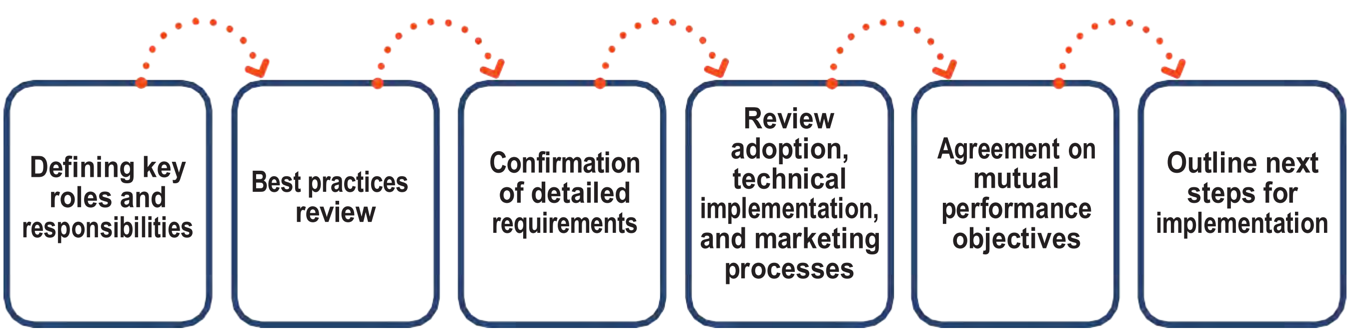
## C. WORK SCHEDULE/TIMELINE – INCLUDE A WORK SCHEDULE/TIMELINE INDICATING WHEN THE ELEMENTS OF THE WORK WILL BE COMPLETED AND WHEN DELIVERABLES WILL BE PROVIDED. SUGGESTIONS, IF ANY, FOR STREAMLINING THE WORK SCHEDULE SHOULD BE PRESENTED. COST IMPLICATIONS FOR STREAMLINING THE SCHEDULE SHOULD BE PRESENTED, IF APPLICABLE.

### AMBASSADOR'S SUCCESSFUL TRANSITION AND IMPLEMENTATION

Transitioning to Ambassador is seamless. Ambassador manages the entire process and will strive to meet your required timeline. Upon contract award, Ambassador will schedule a kick-off meeting where we will walk through the on-boarding process and get input on the following high-level items. **Ambassador does not charge any implementation fees.**

**Please see Ambassador's high-level timeline in Attachment 1**.

> *"Ambassador made the process of switching providers seamless, delivering a straightforward, guided and comprehensive transition. Ambassador's solutions and technologies have elevated our course materials program to the next level, streamlining our operations, helping our financial oversight, and easing course materials acquisition for our students."*
>
> No one trains you like TRIANGLE TECH



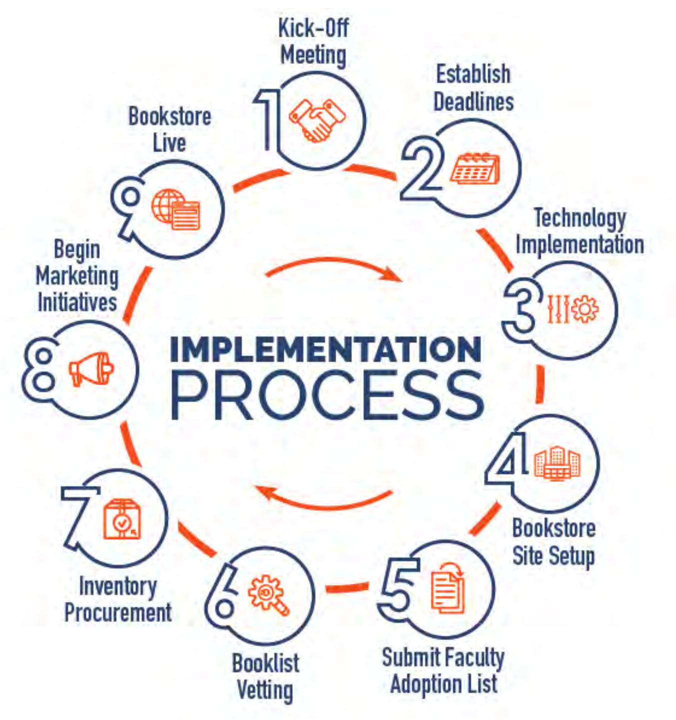
Ambassador knows how to plan for and dedicate an appropriate level of resources to support the project and complete the transition on time with little client interruption. We will prepare a detailed, written implementation plan that will include all action items, timelines, and responsibilities unique to your School:

**Technology Implementation –** Setting up your School's selected service model and the technology and enterprise integrations (SIS, LMS, Financial Systems, eBook Readers, and Digital and Publisher Platforms)

**Training for Booklist Adoption –** Preparing your staff on the adoption process and timelines, as well as reviewing the first semester booklist

**Marketing –** Creating a plan and communications schedule leading up to the launch

Once the initial roll-out is completed, our team will routinely coordinate user group meetings with the appropriate school staff to review all the current systems and procedures in place, as well as discuss recommendations to further customize our services, enhance the student experience, and ease administrative functions.




### UGS'S SUCCESSFUL TRANSITION AND IMPLEMENTATION

University Gear Shop have developed a 125-point schedule covering every aspect of the transition to the University of Mary Washington Gear Shop. The plan covers renovation and store layout changes; e-commerce website creation; merchandising and product set-up; marketing; point-of-sale set up; hiring and training; hardware and software procurement.

| ACTION ITEM | PLANNING | EXECUTION | CLOSURE |
|---|---|---|---|
| Review with designer/renovation construction partners to develop floor plan, flooring, and fixture concepts | Week 1 | Weeks 2-4 | Week 5 |
| Construction and installation of new flooring, wall treatments and fixtures | Week 8 | Weeks 9-15 | Week 16 |
| Design and develop primary e-commerce website | Week 2 | Weeks 3-8 | Week 9 |
| Create and launch survey to campus population re: new gear shop and merchandise. Evaluate results. | Week 2 | Weeks 3-7 | Week 8 |
| Set up any new social media channels (Instagram, Facebook) | Week 4 | Weeks 5-6 | Week 7 |
| Count existing product inventory and validate against list provided by college/vendor | Week 6 | Weeks 7-9 | Week 10 |

| | | | |
|---|---|---|---|
| Select and order items for orientation and/or grand opening | Week 1 | Weeks 2-15 | Week 16 |
| Hire open positions, complete all new hire paperwork with HR, and establish start dates | Week 4 | Weeks 5-10 | Week 11 |
| Provide on-boarding training for all positions | Week 5 | Weeks 6-10 | Week 11 |
| Order POS hardware and set up system for in-store transactions | Week 4 | Weeks 5-8 | Week 9 |

## D. OUTCOMES AND PERFORMANCE MEASUREMENT – DESCRIBE THE IMPACTS/OUTCOMES FIRMS INTEND TO ACHIEVE, INCLUDING HOW THESE OUTCOMES WOULD BE MONITORED, MEASURED AND REPORTED TO THE UNIVERSITY.

**AMBASSADOR OUTCOMES AND PERFORMANCE MEASUREMENT AND REPORTING**
Unlike any other technology on the market, Ambassador's Course Materials Platform, RODA, manages your entire course materials operation. RODA tells you everything you need to know about your program, all through a single, centralized platform. **RODA is available to you at no additional fee.**

**RODA aggregates all the data, information, and interactions that your school has with publishers, courseware providers, platforms, and systems -- and connects the dots**, providing you with actionable, reliable analytics that track your impacts and outcomes, including materials adoptions, transactions, usage, fees, cost savings, and more. RODA tracks all terms, courses and enrollments and aligns detailed analytics with durations, transactions, duplicates, opt-ins/opt-outs, returns and trends. RODA provides 360-degree transparency into all transactions so you know exactly what your students are using and what you owe publishers. Real-time reporting and forecasting provide critical insights and analysis, and transactions are posted to the student ledger with no manual effort required on your part.

Our complete reporting solution is described later in this document, but a sampling of reports that help measure your impacts and outcomes includes the following:

| Sales Reports | Financial Reports | Inventory Reports | Booklist Reports | Affordability Reports |
|---|---|---|---|---|
| ✓ Sales by Pub/ Supplier or Item<br>✓ Backorders<br>✓ Shipping Methods<br>✓ Manual Orders<br>✓ Reorders<br>✓ Order Trends | ✓ Weekly Transactions Invoiced<br>✓ Weekly Sales Tax<br>✓ Monthly Consolidated Sales Tax | ✓ Inventory Needs Forecasting<br>✓ Inventory Not Selling<br>✓ Inventory Last Sold | ✓ Master Booklist<br>✓ Course Activity<br>✓ Booklist w/ Student Sell Price | ✓ Campus Wide Affordability<br>✓ Adopted Titles<br>✓ Dept. Filters<br>✓ Term Level Affordability Average<br>✓ Invoice by Campus |

### AMBASSADOR'S NO-DUPLICATE/DROP REPORT
Ambassador's No-Duplicate functionality prevents students from obtaining the same item more than once if they have already purchased it and/or have an active license. We have controls to track which students request materials and if they already have those items, including access from a prior course. The No-Duplicate/Drop report monitors gross items requested, backs out duplicates, and credits items for dropped students, showing your team how many net items were accurately provisioned and how much money your school saved as a result.

| Site Name | Semester Name | Gross Items Requested | Items Not Provisioned Leveraging Duplicate Functionality | Items Credited/Not Provisioned Leveraging Drop Functionality | Net Items Provisioned | Student Sell Price of Net Items Provisioned | Student Sell Price Savings ($) | Student Sell Price Savings (%) |
|---|---|---|---|---|---|---|---|---|
| School A | Winter Term | 1,500 | 87 | 79 | 1,334 | $117,119.28 | $13,237.66 | 10.74% |
| School B | Winter Term | 17,315 | 3,056 | 2,285 | 11,974 | $797,324.79 | $364,881.76 | 38.4% |
| School C | Winter Term | 42,319 | 4,203 | 5,906 | 32,210 | $1,541,639.83 | $507,204.39 | 27.58% |

## AMBASSADOR'S CONSOLIDATED SEMESTER REPORT

Ambassador's Consolidated Semester Report is a snapshot of all course materials metrics over the term, including term open and close, number of courses, number of SKU's, number of distinct titles, number of distinct student orders, sales, returns, credit card purchases, voucher purchases, items shipped by each method, and more. Schools can compare terms, identify trends, and assess indicators and turning points in pricing, purchases, and revenue.

| | Winter (2023) | Winter (2024) |
|---|---|---|
| Semester Info | | |
| Semester Start Date | 1/2/2023 | 1/8/2024 |
| Bookstore Open Date | 12/5/2022 | 12/11/2023 |
| Bookstore Close Date | 2/10/2023 | 2/16/2024 |
| Booklist Information | | |
| Total # Courses | 615 | 657 |
| Total # ISBNs/SKUs | 557 | 448 |
| Total # Distinct Titles | 276 | 277 |
| Student Enrollment and Sellthrough | | |
| Total Distinct Student Enrollments | 4,249 | 4,880 |
| Total Distinct Students Ordered | 1,074 | 1,250 |
| Total Orders Placed | 1,221 | 1,403 |
| Summary Sales | | |
| Total Sales | $225,059.57 | $227,694.6 |
| Total Returns | ($10,201.72) | ($15,102.22) |
| Net Voucher Sales | $154,770.09 | $150,845.16 |
| Net CC Sales | $60,087.76 | $61,747.31 |
| OB Duplicate Savings | $19,689.9 | $11,873.07 |

| | Winter (2023) | Winter (2024) |
|---|---|---|
| Item Categories Sold | | |
| Electronic Book | 348 | 353 |
| Textbook | 1,473 | 1,485 |
| KITS | 29 | 10 |
| MISC | 323 | 310 |
| Access Code | 54 | 78 |
| Publisher Direct Redemption | 125 | 174 |
| Textbook Rentals | 22 | 10 |
| Shipping Details | | |
| Ground | 926 | 225 |
| Ground Advantage | 0 | 131 |
| Media | 13 | 669 |
| Next Day Air Saver | 38 | 26 |
| Second Day Air | 77 | 48 |
| USPS | 30 | 36 |

## AMBASSADOR'S RETENTION REPORT

Ambassador's Retention Report tracks students who have ordered course materials and those who have not, giving schools actionable insights to be proactive, from sending simple reminders to reaching out to see if there are signs that might impact completion and retention. The report also allows schools to analyze purchasing data and determine whether outcomes and success factors correlate with those students who purchase required course materials.

## UGS OUTCOMES AND PERFORMANCE MEASUREMENT

UGS take customer service very seriously. Upon the awarding of the contract, we will produce and publish a survey to the University of Mary Washington community asking for feedback regarding what they would like to see in their University of Mary Washington Gear Shop. Additionally, each customer that makes a purchase with the University of Mary Washington Gear Shop will be invited to participate in a short survey to inform us of their shopping experience. We use this feedback to learn how we can better serve the community and implement action steps that assure follow-through and continuous improvement.

**Obtaining Regular Feedback**

UGS connects with students, staff, faculty, and alumni in ways that increase campus and online relevance and drive sales. We pride ourselves on our ability to listen to the customer, benefit from their wisdom, and act upon their feedback and input. Because your campus is unique, our first step is to survey our University of Mary Washington customers to learn:


- What they like and dislike in a campus gear shop. Knowing what keeps them coming back is the secret to our success and building loyalty through word-of-mouth advertising and referrals is key to creating lasting relationships.
- Their level of satisfaction with the current store and what they would look for in a new, reimagined store.
- The most effective way to communicate about store events, specials, and new products. We want to reach out to our customers in ways that they want to receive communication.
- What products they need and want. Their help in spotting trends and their input on the items they want stocked in the store will help us stay ahead of the curve in terms of fashion and function.

The second step is to analyze the feedback and develop an in-depth transition and marketing plan based on demographic and survey data.

Finally, we will stock the store and website with the products our customers want and create a customer service experience that builds loyalty and keeps them coming back for more, even after graduation.

After we open our doors, we will continue to solicit feedback through:

- Customer surveys using effective, easy-to-use, web-based surveying tools
- Online feedback from the University of Mary Washington Gear Shop website
- Customer forums and interviews
- Social media polls and post observations

We are open to customer feedback and understand how it guides and informs our decision-making and influences our merchandise mix, technology platforms and overall customer service. By acting on the feedback we are making the shopping and buying experience better for all, increasing our engagement with the campus community and driving sales.

Each year, UGS will deliver an Annual Partnership Review (APR). This review will be presented to the Gear Shop's direct campus contact and an audience of their choosing. The review will highlight the prior year's fiscal performance in addition to the marketing efforts, promotions, special events and community involvement. We believe communication, feedback and response are cornerstones to a successful partnership. Presenting the APR annually will provide the feedback we need to exceed your expectations.

**Operational Excellence**
Through our continuous improvement efforts, we build and maintain efficient processes that produce tangible results in time and cost savings. We adopt a mindset of problem solving, teamwork, and top-line growth, allowing us to create more value for you. The drive to keep improving allows our team to have the capacity to pursue innovation and growth.

We incorporate lean principles of evolutionary change and continuous process improvement rooted in a fundamental respect for people. Our teams regularly examine business processes to simplify and accelerate the path to delivering value to our customers. This creates a self-reinforcing feedback loop between the UGS team and our customers that helps identify and mitigate barriers to progress and creates shared success.

**Culture**
We are committed to a positive culture that focuses on customers' needs and empowers staff. Our motivated staff members have a clear understanding of the goals and plans, feel secure in taking the initiative, and collaborate on ways to drive your brand.

Our culture is defined by these core values:

**Respect is contagious.** We give it, we earn it, we share it across our company and community.

**Collaboration facilitates achievement.** By collaborating closely with our university partners, customers, and suppliers, we create opportunities for everyone in our community to achieve shared goals.

**We are forward thinking.** From innovative solutions to creative resources, we are constantly introducing fresh ideas to meet market demands.

**We are committed to our customers and our community.** Every day we strive for the betterment of our workplace and stakeholders.

**We do not accept the status quo.** Our most powerful growth comes from our daily efforts to be better than yesterday.

**You can count on us.** We take pride in our ability to provide a personal touch and deliver quality in everything we do

## E. OVERALL RISK – DEFINE RISKS SIGNIFICANT TO THE SUCCESS OF THE WORK. INCLUDE HOW YOU PROPOSE TO EFFECTIVELY MONITOR AND MANAGE THESE RISKS, INCLUDING THE REPORTING OF RISKS TO THE UNIVERSITY (I.E., HOW YOU WILL MANAGE STAFF TURNOVER OR OTHER ISSUES THAT MAY NEGATIVELY IMPACT THE WORK, THEIR POTENTIAL AND HOW YOU WOULD PROPOSE TO MITIGATE THEM).

Ambassador's approach takes the heavy lifting off of the school, so risk is mitigated as our team handles the majority of the work. Any risks would be identified during our initial implementation meetings and will be worked through as needed.

University Gear Shop will provide a structured risk assessment for the University of Mary Washington campus store, including risk identification, monitoring strategies, and mitigation approaches:

**Overall Risk Assessment for the University of Mary Washington Campus Store**

### STAFFING AND WORKFORCE STABILITY
**Risks:**
- High staff turnover affecting store operations, customer service, and institutional knowledge.
- Difficulty in hiring and retaining qualified personnel.

**Monitoring & Management:**

- Implement an employee retention plan, including competitive wages, professional development, and staff recognition programs.
- Conduct regular staff satisfaction surveys and exit interviews to identify areas for improvement.
- Maintain a pipeline of potential employees through partnerships with the university (e.g., student workers, internship programs).
- Cross-train employees to ensure operational continuity.

**Reporting:**

- Provide quarterly reports on staffing levels, turnover rates, and mitigation efforts to the university.
- Develop a contingency staffing plan and share updates with university leadership as needed.

## FINANCIAL RISKS AND SALES PERFORMANCE

**Risks:**

- Fluctuations in revenue due to changes in student enrollment, competition from online retailers, or economic downturn.
- High operational costs impacting profitability.

**Monitoring & Management:**

- Diversify revenue streams (e.g., pop-up stores, online sales, partnerships with local vendors).
- Implement dynamic pricing strategies and periodic promotional campaigns.
- Regularly analyze sales trends and adjust inventory accordingly.

**Reporting:**

- Share monthly financial performance reports with the university, including sales trends, expenses, and recommendations for optimization.

## INVENTORY MANAGEMENT AND SUPPLY CHAIN DISRUPTIONS

**Risks:**

- Supply chain delays leading to out-of-stock items.
- Overstocking resulting in excess inventory and financial loss.

**Monitoring & Management:**

- Utilize a data-driven inventory management system to forecast demand and optimize stock levels.
- Establish relationships with multiple vendors to reduce supply chain dependency.
- Implement just-in-time inventory strategies where feasible.

**Reporting:**

- Submit periodic inventory reports highlighting stock levels, best-selling items, and potential risks to product availability.

## COMPETITION FROM ONLINE AND LOCAL RETAILERS

**Risks:**

- Increased competition from Amazon, Chegg, and local bookstores affecting sales.

**Monitoring & Management:**

- Enhance the store's e-commerce platform and offer price-matching on select items.
- Promote exclusive in-store experiences, loyalty programs, and personalized customer service.
- Expand product offerings to include affordable merchandise options for a wider customer base.

**Reporting:**

- Provide competitive analysis reports twice a year, outlining pricing trends and customer preferences.

### COMPLIANCE AND CONTRACTUAL OBLIGATIONS

**Risks:**
- Failure to comply with university policies or industry regulations.
- Potential legal or financial risks due to mismanagement.

**Monitoring & Management:**
- Conduct periodic compliance audits to ensure adherence to university policies.
- Train staff in compliance and ethical business practices.

**Reporting:**
- Submit compliance reports annually and notify the university of any major regulatory updates or risks.

### TECHNOLOGICAL RISKS

**Risks:**
- System failures or cybersecurity threats impacting point-of-sale and e-commerce operations.

**Monitoring & Management:**
- Regularly update and maintain store technology infrastructure.
- Implement robust cybersecurity protocols, including employee training in data security.

**Reporting:**
- Provide incident reports and IT system audits to the university on an annual basis or as issues arise.

Proactively managing these risks will ensure the continued success of the University of Mary Washington campus store. By implementing structured monitoring strategies and maintaining open communication with the university, we can swiftly address potential challenges while keeping operations efficient and customer focused.

# 6. COMPLETE AND RETURN ATTACHMENT F: SMALL BUSINESS SUBCONTRACTING PLAN.

Please see **Attachment 8/Attachment F**.

# 7. SUBMIT ANY EXCEPTIONS THE OFFERING FIRM TAKES TO THE TERMS AND CONDITIONS AS STATED IN THIS RFP.

We do not have any exceptions to the RFP.

# 8. ANY OTHER INFORMATION THE OFFEROR BELIEVES WILL HELP THE UNIVERSITY EVALUATE ITS PROPOSAL.

All relevant information is contained within this proposal.

# GENERAL

# 1. STRATEGIES

**DESCRIBE HOW YOUR ORGANIZATION PLANS TO ADAPT TO THE CHANGING LANDSCAPE OF CAMPUS STORE RETAIL, FOCUSING ON INNOVATION AND RESPONSIVENESS TO MARKET TRENDS. HIGHLIGHT STRATEGIES TO ENGAGE BOTH THE UNIVERSITY COMMUNITY AND THE BROADER MARKET, ENSURING YOUR APPROACH ALIGNS WITH EVOLVING CONSUMER PREFERENCES.**

### AMBASSADOR INNOVATION

Schools trust Ambassador to improve course materials accessibility, lower operational and financial risks, and deliver transparency. Our commitment to innovation enables us to stay ahead of market demand, handling current needs and scaling for the long-term viability of your course materials program within the rapidly changing market.

At Ambassador, we have an intimate understanding of the market and are always brining new ideas and new solutions to the table. We understand the changing dynamics of students, and we have the solutions to ensure their course materials are easy to access and positively impact their learning experience. We understand the widespread fragmentation of content, and we have the solutions to bring it all together in a way that is simple and intuitive. We understand pressures IT face in managing multiple systems and platforms, and we streamline course materials management and integrations in a way no other company can. Team Ambassador has a proven track record preparing schools for today and making sure they are ready for tomorrow.

### FLEXIBLE SERVICES MODELS TO ADAPT AS YOU NEED THEM

Ambassador's service models offer a level of flexibility and collaboration like you've never seen.

- **Online Bookstore:** branded with your logo and colors, students can order materials anywhere, anytime.
- **All-In Inclusive Access and Equitable Access:** students automatically receive all course materials in time for the first day of class.
- **Hybrid Bookstore:** students can easily order materials from your online bookstore, while still connecting with peers and purchasing ancillary items at the on-campus bookstore.
- **Bulk Fulfillment:** all print course materials are aggregated and delivered in bulk to your school for distribution to students.
- **Ambassador Flex:** combine any or all of Ambassador's service models to meet your school's unique requirements, by course, by program, and by institution.

### UGS INNOVATION

In an era where consumer behaviors and retail expectations are rapidly evolving, UGS is dedicated to transforming the campus store experience through innovation, adaptability, and strategic engagement. By embracing digital transformation, leveraging data-driven product selection, and enhancing both in-store and online shopping experiences, we ensure that the campus store remains relevant and responsive to market trends. Our approach prioritizes community engagement, sustainability, and technological advancements to create a dynamic retail environment that serves students, faculty, alumni, and a broader audience. Through continuous adaptation and strategic initiatives, UGS is committed to aligning with evolving consumer preferences while strengthening the University of Mary Washington's brand presence.

### EMBRACING INNOVATION AND MARKET RESPONSIVENESS

UGS is committed to evolving with the dynamic campus retail environment by integrating innovative solutions and adapting to shifting market trends. Our approach focuses on enhancing the shopping experience, optimizing product offerings, and leveraging digital and physical retail strategies to meet the expectations of students, faculty, alumni, and the broader community.

**A. Digital Transformation and E-Commerce Expansion**

- **Omnichannel Shopping Experience:** Develop a seamless integration between physical and digital storefronts, ensuring customers can browse, purchase, and receive items through multiple channels.
- **Enhanced Online Store:** Expand e-commerce capabilities with user-friendly navigation, personalized recommendations, and exclusive online promotions.
- **Mobile and Contactless Payment Solutions:** Implement mobile-friendly checkout options, including Apple Pay, Google Pay, and QR-based transactions, to streamline purchases.

**B. Data-Driven Product Selection and Customization**

- **Market Research and Analytics:** Utilize sales data, trend forecasting, and student feedback to refine inventory and introduce high-demand products.
- **Personalized and Custom Merchandise:** Offer customized apparel, accessories, and gift items tailored to university-specific events, clubs, and student organizations.
- **Sustainable and Ethical Product Lines:** Introduce eco-friendly, ethically sourced merchandise that aligns with student values and sustainability initiatives.

**C. Strengthening Campus and Community Engagement**

- **Pop-Up Shops and Event-Based Retailing:** Deploy pop-up retail locations at sporting events, concerts, and academic conferences to meet customers where they gather.
- **Student Ambassador and Influencer Program:** Leverage student brand ambassadors to promote merchandise through social media and campus involvement.
- **Collaborations with Local and National Brands:** Partner with local businesses, alumni-owned enterprises, and national brands to create exclusive co-branded merchandise.

**D. Enhancing the In-Store Experience**

- **Interactive Retail Concepts:** Incorporate experiential retail elements such as in-store customization stations, digital kiosks, and augmented reality (AR) product previews.
- **Flexible Store Layouts:** Design adaptable retail spaces that accommodate seasonal changes, limited-time collections, and high-traffic event periods.
- **Loyalty and Rewards Programs:** Introduce student and faculty loyalty programs offering discounts, exclusive access, and early product releases.

## ALIGNING WITH EVOLVING CONSUMER PREFERENCES

**A. Sustainable and Socially Responsible Retailing**

- Introduce more sustainable packaging and eliminate single-use plastics where possible.
- Offer transparency in sourcing and ethical labor practices.
- Support fair-trade and BIPOC-owned businesses in merchandising selections.

**B. Expanding Beyond the University Market**

- Develop regional and national marketing campaigns to attract alumni and families.
- Offer drop-shipping partnerships to increase access to specialized merchandise.
- Implement social commerce strategies, selling through platforms like Instagram, TikTok, and Facebook.

**C. Continuous Adaptation and Feedback Integration**

- Establish real-time customer feedback channels through surveys and AI-driven chat support.
- Conduct quarterly reviews of consumer trends, adjusting inventory and promotions accordingly.
- Maintain an agile approach to campus retail, regularly testing new concepts and responding swiftly to emerging trends.

Staying ahead of retail trends, embracing innovation, and engaging deeply with the University of Mary Washington community and beyond, UGS ensures that the campus store remains a thriving and relevant retail destination.

# 2. HOURS OF OPERATION

**A. THE FIRM SHALL OPERATE THE CAMPUS STORE ON A 12-MONTH BASIS, WITH HOLIDAYS SUBJECT TO THE UNIVERSITY'S ACADEMIC CALENDAR, FOUND AT HTTPS://ACADEMICS.UMW.EDU/CALENDAR/. THE UNIVERSITY RESERVES THE RIGHT, UPON CONSULTATION WITH THE FIRM, TO ESTABLISH OR CHANGE THE SERVICE HOURS, PLANS OR OTHER METHODS OF OPERATION OF THE CAMPUS STORE.**

For the On-Campus Store, University Gear Shop acknowledges and agrees with this statement.

**B. PROPOSE REGULAR OPERATING HOURS FOR THE COURSE MATERIALS AND GENERAL MERCHANDISE STORE(S). DESCRIBE THE FIRM'S POLICY FOR ESTABLISHING AND MODIFYING OPERATING HOURS.**

For the Online Bookstore for course materials, students can place orders 24x7x365. Extended support during rush and peak times can be provided.

For the On-Campus Store, UGS acknowledges that establishing well-defined and flexible operating hours is essential to ensuring the University of Mary Washington campus store effectively serves students, faculty, staff, and the broader community. UGS is committed to maintaining store hours that align with academic schedules, campus events, and consumer needs while remaining adaptable to seasonal and special event demands. By leveraging data analysis, stakeholder input, and collaboration with university leadership, UGS will continuously assess and refine store hours to maximize accessibility and convenience. Our approach prioritizes responsiveness, customer engagement, and operational efficiency to create an optimal shopping experience for all members of the university community.

### PROPOSED REGULAR OPERATING HOURS AND STORE POLICY

UGS is dedicated to establishing store hours that best serve the University of Mary Washington community while remaining flexible to evolving needs.

**A. Standard Operating Hours**

- Monday – Friday: 8:00 AM – 5:00 PM
- Saturday: 10:00 AM – 4:00 PM
- Sunday: Closed (except during peak seasons and special events)

**B. Peak Season and Special Event Hours**

- Extended hours during back-to-school rush, finals week, and major university events such as commencement.
- Additional hours for athletic games, alumni weekends, and campus-wide celebrations.

**C. Policy for Establishing and Modifying Store Hours**

- Data-Driven Decisions: Store hours are reviewed quarterly based on foot traffic, sales trends, and community feedback.
- Collaboration with the University: UGS works closely with university administration and student organizations to align hours with campus activities and academic schedules.
- Community and Stakeholder Considerations: Input from students, faculty, and staff is actively sought through surveys and advisory meetings to ensure accessibility and convenience.

- Emergency and Inclement Weather Adjustments: Store hours will be adjusted in coordination with university policies for severe weather or emergency situations.

By maintaining a flexible and responsive approach to store operations, UGS ensures that the University of Mary Washington campus store remains a convenient and essential resource for students, faculty, and the broader university community.

**C. THE FIRM SHOULD ENHANCE SALES BY ACTIVELY PARTICIPATING IN AND SUPPORTING VARIOUS SPECIAL CAMPUS EVENTS. THE FIRM SHALL PARTICIPATE IN THE FOLLOWING EVENTS, AT MINIMUM: MOVE-IN, WELCOME WEEK, NEW STUDENT ORIENTATION, COMMENCEMENT, GRAD FAIR, GREAT LIVES, HOMECOMING, REUNION, OPEN HOUSE, SPORTING EVENTS IN COORDINATION WITH UMW ATHLETICS, HONORS MOVE-IN, COORDINATED WITH UMW HONORS DEPARTMENT, AND ANY OTHER EVENTS THAT REQUIRE EXPANDED OR EXTENDED HOURS AND BASED UPON MUTUAL AGREEMENT.**

**I. THE SPECIFIC EVENTS AND THEIR DATES MAY VARY AND CAN BE FOUND ON THE UNIVERSITY'S WEBSITE.**

UGS acknowledges the importance of active participation in campus events and continuously seeking new opportunities to engage with the university community. Unlike traditional campus store models that operate primarily from a fixed location, UGS embraces a dynamic and event-driven retail approach. By actively participating in university functions, athletic events, pop-up retail experiences, and special initiatives, UGS creates a more immersive and accessible shopping experience. This adaptability not only enhances brand visibility but also strengthens connections with students, faculty, and alumni. UGS's commitment to flexibility, innovation, and engagement ensures that the campus store remains an integral part of the university experience, setting it apart from conventional retail operations.

# D. PARKING:

**1. THE FIRM SHALL PROVIDE, BE RESPONSIBLE FOR AND MAINTAIN ANY VEHICLES NECESSARY FOR THE PERFORMANCE OF THIS CONTRACT. PARKING ARRANGEMENTS, PERMITS AND FINES ARE THE RESPONSIBILITY OF THE FIRM. INFORMATION ABOUT PARKING CAN BE FOUND AT HTTPS://ADMINFINANCE.UMW.EDU/PARKING/**

Ambassador and UGS acknowledge and agree to this statement.

# E. STAFFING:

**1. MANAGERS**

**A. PROVIDE RESUMES FOR MANAGEMENT CANDIDATES.**

Resumes for management candidates will be provided upon award. Additionally, UGS will partner with the University of Mary Washington in the selection process.

**B. THE DIRECTOR OF BUSINESS SERVICES OR AN APPOINTEE SHALL APPROVE THE CAMPUS STORE MANAGER APPOINTED BY THE FIRM.**

University Gear Shop acknowledges and agrees with this statement.

**C. ANY MANAGERIAL CHANGES SHALL REQUIRE PRIOR CONSULTATION WITH AND APPROVAL FROM THE UNIVERSITY.**

University Gear Shop acknowledges and agrees with this statement.

**D. THE FIRM CAN TEMPORARILY ASSIGN INTERNAL MANAGERS IN CASES OF MEDICAL OR FAMILY EMERGENCIES OR WHEN SEARCHING FOR A NEW MANAGER, WHICH MUST BE COMMUNICATED TO THE DIRECTOR OF BUSINESS SERVICES OR AN APPOINTEE BUT DOESN'T REQUIRE APPROVAL.**

**I. TEMPORARY MANAGERS CAN BE ASSIGNED FOR A PERIOD OF UP TO SIX MONTHS WITHOUT REQUIRING APPROVAL. BEYOND SIX MONTHS, CONTINUATION OF THEIR ASSIGNMENT MUST BE APPROVED BY THE DIRECTOR OF BUSINESS SERVICES OR A DESIGNATED APPOINTEE.**

University Gear Shop acknowledges and agrees with this statement.

**E. THE UNIVERSITY RESERVES THE RIGHT TO REQUEST THE REASSIGNMENT OF ANY MANAGERS, INCLUDING TEMPORARY ONES, FOR REASONS DETERMINED BY THE UNIVERSITY.**

University Gear Shop acknowledges and agrees with this statement.

**F. DESCRIBE HOW MANAGEMENT WILL FOSTER POSITIVE RELATIONS WITH FACULTY, STUDENTS, AND DEPARTMENTS.**

The Gear Shop will be a focal point of the University of Mary Washington campus. As such, UGS understands that our team members are truly brand ambassadors, offering excellent customer service at every opportunity. We will take a planned approach to:

- Define our hiring goals based on store hours, special events and the school academic calendar, and identify the ideal candidates for each role
- Create a recruitment campaign to ensure candidates know about our company culture, values, expectations, and benefits of working at the University of Mary Washington Gear Shop
- Review applications, pre-select, and interview highly qualified candidates, which fit our customer service culture
- Select the candidates that will fit the culture and have the experience and aptitude to learn our policies and procedures. By hiring for culture fit we create a positive work environment, and our staff members are truly engaged and supportive of the team, the college, and the goals of the Gear Shop.
- On-board and train all team members on customer service, merchandise, processes, policies, and procedures of the organization and Gear Shop.

UGS encourages students to apply for open positions and will schedule work hours to ensure that there are no conflicts with classes and academic studies.

## 2. GENERAL STAFFING

**A. OUTLINE STRATEGIES TO ENSURE ADEQUATE STAFFING DURING PEAK PERIODS, AND METHODS TO MINIMIZE CHECKOUT WAIT TIMES.**

Ensuring a well-staffed and efficient campus store during peak periods is essential to providing a seamless shopping experience for students, faculty, and visitors at the University of Mary Washington. UGS is committed to proactive workforce planning, leveraging flexible staffing solutions, and implementing technology-driven efficiencies to manage high-traffic times effectively. By strategically increasing personnel, cross-training employees, and integrating innovative checkout solutions, UGS aims to minimize waiting times and enhance customer satisfaction. Our approach prioritizes operational agility, ensuring that the store remains responsive to demand fluctuations while maintaining a high level of service throughout the academic year.

## STAFFING STRATEGIES AND CHECKOUT EFFICIENCY

**A. Ensuring Adequate Staffing During Peak Periods**

- Seasonal and Temporary Hires: Recruit and train temporary staff during peak seasons, such as back-to-school, holiday shopping, and graduation.
- Flexible Scheduling: Implement a dynamic scheduling system that allows for additional shifts and extended hours as demand increases.
- Cross-Training Staff: Train employees across multiple roles, enabling them to assist in various departments and improve overall store efficiency.
- Student Employment Programs: Offer work-study and part-time positions to students, ensuring a reliable workforce while fostering campus engagement.

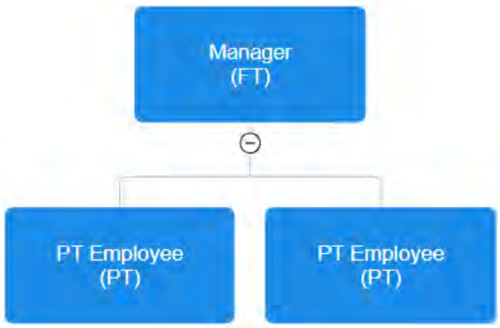
**B. Minimizing Checkout Wait Times**

- Mobile Checkout and Self-Checkout Stations: Implement self-checkout kiosks and mobile point-of-sale systems to expedite transactions.
- Queue Management Technology: Utilize digital queue management systems to distribute customers efficiently across available registers.
- Express Checkout Lanes: Designate express lanes for small purchases and online order pickups to reduce congestion.
- Pre-Packed Course Materials and Online Reservations: Allow students to pre-order and pick up course materials, minimizing in-store traffic and reducing checkout times.

Maintaining a flexible and responsive approach to store operations, staffing, and checkout efficiency, ensures that the University of Mary Washington campus store remains a convenient and essential resource for students, faculty, and the broader university community.

## B. PROVIDE AN ORGANIZATION CHART FOR EACH OPERATION, INDICATING THE MINIMUM BASE CREW STAFF, WHICH REPRESENTS THE LOWEST STAFFING LEVEL.

UGS is committed to maintaining an adaptable staffing structure that ensures efficient operations while remaining responsive to fluctuating demand. Our organization chart outlines the minimum base crew staff required to sustain daily operations at the University of Mary Washington campus store, while also demonstrating UGS's ability to scale staffing levels as needed. By implementing a flexible workforce strategy—including cross-training employees, utilizing part-time and seasonal staff, and leveraging student employment opportunities, UGS can efficiently adjust to peak periods and special events. This approach ensures optimal service levels while maintaining cost-effective staffing solutions tailored to the evolving needs of the campus community.



## C. DETAIL INCENTIVE COMPENSATION GUIDELINES FOR KEY PERSONNEL TO MOTIVATE PERFORMANCE.

To motivate personnel performance at the University of Mary Washington campus store, UGS will implement several strategies focusing on recognition, career development, work environment, and empowerment. Below is a comprehensive summary of how these strategies can be applied:

### RECOGNITION AND APPRECIATION

- **Public Acknowledgment**: Regularly recognizing associates for their hard work in team meetings or through campus store communications fosters a sense of accomplishment. Recognizing specific achievements, like outstanding customer service or exceeding sales targets, can go a long way in motivating staff.
- **Employee of the Month Programs**: Introduce an "Employee of the Month" recognition system where associates are selected based on their contributions. This can include a certificate or a preferred parking spot, which doesn’t cost the company extra but boosts morale and shows appreciation.
- **Peer Recognition**: Encouraging associates to recognize each other’s efforts in a structured way can cultivate a supportive work environment. A simple "thank you" board or digital shoutouts can help create a culture of mutual respect.

### CAREER DEVELOPMENT AND GROWTH OPPORTUNITIES

- **Training and Skill Development**: Offering associates opportunities to enhance their skills through internal training sessions or access to educational resources is a powerful motivator. This could include leadership training, product knowledge sessions, or customer service workshops. Associates who feel they are learning and improving are more likely to stay engaged.
- **Career Pathway**: Establish clear pathways for career advancement. Associates who see that there are growth opportunities within the campus store, such as the potential for promotion or lateral movement into other departments (e.g., marketing, inventory management), are more likely to remain motivated.
- **Mentorship Programs**: Pair newer associates with experienced ones to encourage professional development and provide guidance. Mentorship fosters a collaborative environment and gives associates a sense of being part of something larger than their individual role.

### AUTONOMY AND EMPOWERMENT

- **Decision-Making Opportunities**: Empower associates by giving them a voice in decision-making processes. For example, allowing them to contribute ideas on store layouts, promotions, or merchandising strategies can create a sense of ownership and pride in their work.
- **Autonomous Roles**: Encouraging associates to take initiative in their roles, such as managing a section of the store or handling specific customer service tasks, helps them feel valued and trusted. Empowering associates in these ways fosters responsibility and intrinsic motivation.

### POSITIVE WORK ENVIRONMENT

- **Team Building**: Organize regular team-building activities such as outings, lunches, or informal gatherings that help foster camaraderie and a positive work environment. These activities help associates feel more connected to each other, creating a more supportive and cohesive team.
- **Work-Life Balance**: Encourage work-life balance by offering flexible schedules or accommodating personal needs where possible. A workplace that recognizes the importance of personal time is one where associates feel valued, leading to higher job satisfaction and motivation.

- **Clear Communication**: Establishing open lines of communication between management and associates ensures that concerns are addressed quickly, and staff feels informed and included in the decision-making process. Transparent communication builds trust and motivates employees to perform at their best.

### GOAL SETTING AND FEEDBACK

- **Clear Expectations**: Set clear and achievable performance goals for each associate. Regularly review their progress and provide feedback on areas of strength and areas for improvement. This will help associates stay focused on objectives and feel a sense of accomplishment as they meet these goals.
- **Constructive Feedback**: Providing regular constructive feedback, along with praise for work well done, ensures associates know where they stand and how they can continue to improve. This type of feedback motivates by showing that their performance is valued and contributing to the overall success of the store.

### OTHER INCENTIVES

- **Flexible Scheduling**: Provide top performers with the option of flexible shifts or preferred working hours, which can serve as a non-monetary reward. This shows that management values their contribution.
- **Professional Development Incentives**: Offer non-cash incentives like tickets to workshops, conferences, or other professional development opportunities that will benefit associates personally and professionally.
- **Extra Time Off**: Reward high performers with extra time off or the option for a longer lunch break as a sign of appreciation for their hard work.
  UGS will motivate campus store associates at the University of Mary Washington which will contribute to a more engaged, motivated, and productive team. The key is to foster a supportive environment that emphasizes recognition, growth, and autonomy.

## D. EXPLAIN HOW THE FIRM RECOGNIZES AND REWARDS EMPLOYEES FOR EXEMPLARY CUSTOMER SERVICE.

Please see response to the prior inquiry.

## E. SPECIFY THE MINIMUM QUALIFICATIONS REQUIRED FOR KEY STAFF MEMBERS.

UGS's minimum qualifications for key staff members at the University of Mary Washington campus store are designed to ensure that the team is composed of qualified, motivated, and capable individuals who can provide exceptional service to students, faculty, and visitors. These qualifications focus on relevant experience, customer service skills, leadership abilities, and a strong understanding of retail operations. Each key staff member will be expected to possess a balance of technical and interpersonal skills to effectively manage and contribute to the store's success.

### STORE MANAGER

- Education: Bachelor's degree in business administration, retail management, or a related field.
- Experience: Minimum of 3-5 years of experience in retail management, including at least 1 year of supervisory or leadership experience in a campus store or similar retail environment.
- Skills:
  - Strong leadership, organizational, and decision-making abilities.
  - Proficiency in inventory management and point-of-sale systems.
  - Excellent communication and interpersonal skills.
  - Ability to manage budgets, sales reports, and staffing schedules.

- Attributes: Ability to handle customer service issues and conflicts with professionalism and patience. Strong focus on sales, operations, and team performance.

**SALES ASSOCIATES**

- Education: High school diploma or equivalent required; some college coursework in business or retail is preferred.
- Experience: At least 6 months to 1 year of experience in customer service or retail positions.
- Skills:
  - o Basic knowledge of customer service best practices.
  - o Ability to operate POS systems and handle cash transactions.
  - o Strong product knowledge and willingness to learn about store offerings.
  - o Excellent communication skills and team-oriented attitude.
- Attributes: Enthusiastic, dependable, and willing to take initiative in a fast-paced retail environment.

**STOCK CLERK**

- Education: High school diploma or equivalent required.
- Experience: Prior retail or warehouse experience is preferred but not mandatory.
- Skills:
  - o Basic organizational and time management skills.
  - o Ability to lift and carry products (up to 50 lbs).
  - o Understanding of inventory management practices.
  - o Ability to use basic office and retail equipment (e.g., scanners, stockroom organization tools).
- Attributes: Attention to detail, physical stamina, and the ability to work independently or in a team environment.

UGS's key staff members at the University of Mary Washington campus store must possess a blend of relevant experience, practical skills, and customer service orientation. These qualifications ensure that the store will run efficiently, meet sales goals, and provide a positive, welcoming experience for the university community. The emphasis on experience, skill development, and team-oriented attributes will foster a culture of excellence in the campus store's operations.

**F. ALL EMPLOYEES OF THE FIRM SHALL BE THE FIRM'S SOLE RESPONSIBILITY IN TERMS OF SALARY, BENEFITS AND TAXES.**

University Gear Shop acknowledges and agrees with this statement.

**G. ALL PERSONNEL SHALL BE APPROPRIATELY ATTIRED IN APPROVED UNIFORM WITH A VISIBLE NAME TAG AND UNIVERSITY ISSUED ID (UMW EAGLEONE CARD).**

**I. DESCRIBE THE STAFF DRESS CODE REQUIREMENTS.**

UGS's staff dress code for the University of Mary Washington campus store will align with the University's expectations for business casual attire, with a focus on professionalism, cleanliness, and consistency. All personnel are required to adhere to the following standards to ensure they represent both UGS and the University in a positive and professional manner.

**UNIFORM REQUIREMENTS**

- **Approved Uniform**: All staff members must wear UGS and UMW approved attire:
  - o **Shirt/Top**: A polo shirt or button-down shirt featuring the official University of Mary Washington logo. The shirt should be neatly pressed and clean.
  - o **Pants/Skirts**: Khaki or dress slacks, or a modest-length skirt or dress. Denim, leggings, or shorts are not permitted unless otherwise specified for a casual day or specific event.

### NAME TAG AND ID REQUIREMENTS

- **Name Tag**: A visible name tag must be always worn during shifts. The name tag will feature the associate's first name and the UMW logo, providing easy identification for customers.

### BUSINESS CASUAL ATTIRE

- **Tops**: Staff are encouraged to wear collared shirts (polo shirts, button-downs) in solid colors or subtle patterns. T-shirts are permissible only if they have the UMW logo and are related to official University events. Tops should be clean, well-fitting, and free of offensive graphics or slogans.
- **Bottoms**: Business casual slacks, chinos, or skirts are appropriate. Pants should be wrinkle-free and fit properly—neither too tight nor too loose. Skirts should be modest length (at least knee-length).
- **Shoes**: Closed-toe shoes are required for safety and professionalism. Options can include flats, loafers, or dress shoes in neutral colors.
- **Accessories**: Staff may wear simple accessories such as watches, small jewelry, and modest belts. Accessories should not be distracting or excessive.
- **Hats/Headgear**: Hats, caps, or other headgear are not permitted, unless they are part of an approved uniform or for religious or medical purposes.

### FLEXIBILITY AND EXCEPTIONS

- **Special Events**: For campus events, promotional days, or community outreach activities, UGS may provide alternative dress code guidelines that align with the event's theme or nature. This may include casual or themed attire, but all uniforms or event-specific dress will still maintain a level of professionalism.
- **Religious and Medical Exceptions**: Staff members who require exceptions to the dress code for religious or medical reasons should discuss accommodation with their supervisor.

The UGS dress code for the University of Mary Washington campus store is designed to maintain a professional and consistent appearance while allowing for personal expression within reasonable boundaries. By following these guidelines, staff members will present a polished, unified front that enhances the overall customer experience, aligns with the University's expectations, and upholds the values of UGS and the institution.

### H. ALL PERSONNEL SHALL CARRY THEIR UNIVERSITY ISSUED ID CARD (UMW EAGLEONE CARD) AT ALL TIMES WHILE ON DUTY.

University Gear Shop acknowledges and agrees with this statement.

### N. UMW EAGLEONE CARDS ARE NON-TRANSFERABLE, MEANING EACH EMPLOYEE SHALL HAVE THEIR OWN UNIQUE IDENTIFICATION CARD.

University Gear Shop acknowledges and agrees with this statement.

### J. THE FIRM, OR THEIR EMPLOYEES, SHALL PAY ANY FEES ASSOCIATED WITH ACQUIRING OR REPLACING THESE IDENTIFICATION CARDS. (AS OF JANUARY 2025, THE FEE IS $20.00 PER CARD. THIS RATE SHALL BE SUBJECT TO CHANGE.)

University Gear Shop acknowledges and agrees with this statement.

### K. THE FIRM SHALL NOTIFY THE CONTRACT ADMINISTRATOR BY E-MAIL ON THE DAY OF ANY EMPLOYEE BEGINNING OR REMOVAL FROM SERVICE FOR THIS CONTRACT.

University Gear Shop acknowledges and agrees with this statement.

**L. THE IDENTIFICATION CARD (UMW EAGLEONE CARD), UMW KEYS AND PARKING DECAL OF THE DEPARTED EMPLOYEE SHALL BE RETURNED TO THE CONTRACT ADMINISTRATOR NO LATER THAN THREE (3) BUSINESS DAYS, OR PURSUANT TO THE UMW CONTRACT ADMINISTRATOR'S WRITTEN DIRECTION.**

University Gear Shop acknowledges and agrees with this statement.

**M. DETAIL TRAINING OFFERED TO STAFF, INCLUDING ORIENTATION AND CUSTOMER SERVICE.**

Should UGS be awarded the operational contract for University of Mary Washington Gear Shop, the planning and allocation of branded merchandise begins immediately. The Director of Inventory Procurement will begin sourcing branded merchandise, gifts and hardgoods per University of Mary Washington branding guidelines. UGS will ask for a marketing liaison for the purpose of approving branded merchandise artwork. Those items will be ordered and available for stocking the new MC Gear Shop on the day of transition.

During the first ninety (90) days of the transition, there are many activities taking place. From introductions to the community to planning and executing a renovation. University of Mary Washington can expect the focused support or the entire UGS organization.

As mentioned earlier in this proposal, upon the awarding of the contract, we will produce and publish a survey to University of Mary Washington community asking for feedback regarding what they would like to see in University of Mary Washington Gear Shop. This is critical information as it will allow UGS to respond with the merchandise most sought after by all stakeholders.

Once UGS is awarded the contract for the operation of University of Mary Washington Gear Shop, we will immediately look to begin the transition of the current Store Manager and staff, should that be the desire of University of Mary Washington. If University of Mary Washington is interested in a new Store Manager, the search will begin immediately with a job advertisement both locally and via Indeed and LinkedIn. Once the Store Manager is identified, we will have them spend one week with the Regional Manager and Store manager at our Abilene Christian University location. This will allow University of Mary Washington Gear Shop Store Manager to become acclimated with UGS policies, procedures, and expectations, including Customer Service training.

After University of Mary Washington Gear Shop Store Manager has spent a week at our Capital University Gear Shop location, the Regional Manager and/or the Training Manager/Mentor will reciprocate and spend one week at University of Mary Washington Gear Shop. During this time, the learnings from the visit to the Capital University Gear Shop will be implemented and put into practice. This will guarantee a smooth transition of the Store Manager.

While the Store Manager is being trained, the EVP, Sales & Strategic Partnerships will request a meeting that includes representatives from all the major stakeholder departments. (SGA, Faculty Senate, Institutional Advancement, etc.) During this meeting, a brief overview of UGS will be given along with an understanding by UGS of the expectations.

There will be multiple visits within the first ninety (90) days from the EVP, Sales & Strategic Partnerships, the Regional Manager, and the Training Manager/Mentor. It will be critical for these associates to make those visits to learn and adapt to University of Mary Washington culture and immerse themselves into the expectations and the community.

**N. THE FIRM SHALL PAY STUDENT EMPLOYEES AT OR ABOVE THE COMMONWEALTH OF VIRGINIA MINIMUM WAGE.**

University Gear Shop acknowledges and agrees with this statement.

**O. THE UNIVERSITY RESERVES THE RIGHT TO REQUEST THE REASSIGNMENT OF ANY EMPLOYEE, INCLUDING TEMPORARY ONES, FOR REASONS DETERMINED BY THE UNIVERSITY.**

University Gear Shop acknowledges and agrees with this statement.

## 3. INTERNSHIPS

**THE UNIVERSITY SEEKS TO EXPAND OPPORTUNITIES FOR ITS STUDENTS TO HAVE TRAINING OR PAID INTERNSHIPS. UNIVERSITY REQUESTS THAT THE FIRM CITE AND DESCRIBE ANY TRAINING AND/OR INTERNSHIP PROGRAMS THAT THE FIRM CURRENTLY OFFERS OR PLANS TO OFFER OVER THE COURSE OF THE RESULTING AGREEMENT.**

UGS is committed to providing valuable training and internship opportunities for University of Mary Washington (UMW) students. Our goal is to offer students hands-on experience in various facets of retail management, marketing, and operations, equipping them with practical skills that will support their academic growth and enhance their career prospects. As part of our ongoing commitment to the UMW community, UGS plans to offer training and internship programs across different departments, with a special emphasis on our **Marketing Internship Program**.

### MARKETING INTERNSHIP PROGRAM

UGS recognizes the value of offering UMW students comprehensive and immersive experience in marketing within a retail environment. The **Marketing Internship Program** is designed to provide students with the opportunity to apply classroom knowledge in a real-world setting, while also helping UGS expand its reach and visibility among UMW students and the broader community.

**Key Components of the Marketing Internship Program:**

- **Duration**: The internship typically lasts for one semester, with the possibility of extending depending on performance and ongoing project needs.
- **Role and Responsibilities**: Marketing interns will work directly with UGS's marketing team to support a variety of initiatives, including:
    - Assisting in the development and execution of marketing campaigns for campus store promotions, seasonal sales, and special events.
    - Creating content for digital marketing platforms, including social media posts, email newsletters, and website updates.
    - Conducting market research and surveys to assess customer needs and preferences.
    - Analyzing sales data and customer feedback to evaluate the effectiveness of marketing efforts.
    - Coordinating in-store promotions and visual merchandising efforts to enhance product visibility and drive sales.
- **Skills Development**: Interns will gain hands-on experience in several key marketing disciplines, including social media strategy, content creation, event promotion, and data analysis.
- **Mentorship and Support**: Each intern will be paired with a mentor from UGS's marketing team, who will provide guidance and feedback throughout the internship. Regular check-ins will ensure that students receive the support they need to succeed and maximize their learning experience.
- **Academic Credit**: UGS will work with UMW to ensure that eligible students can earn academic credit for completing the internship, based on the university's requirements.

## RETAIL OPERATIONS INTERNSHIPS

In addition to the Marketing Internship Program, UGS also offers opportunities for students to gain practical experience in retail operations, inventory management, and customer service. These internships provide students with a deeper understanding of the day-to-day operations of a campus store, and interns will have the chance to shadow senior staff members in leadership roles.

**Key Components of the Retail Operations Internship:**

- **Duration**: Typically offered during summer or academic breaks, this internship spans 10-12 weeks.
- **Role and Responsibilities**: Interns will assist in various operational tasks, including:
  - Inventory management, restocking, and assisting with product ordering.
  - Observing store management operations, including budgeting, scheduling, and staff training.
  - Participating in sales and customer service initiatives to enhance the in-store experience.
- **Skills Development**: Interns will develop critical skills in retail management, customer service, sales strategies, and inventory systems.
- **Compensation**: These internships are also paid, providing students with financial support while they gain professional experience.

## FUTURE PLANS FOR INTERNSHIP EXPANSION

UGS plans to expand its internship offerings over time, with a focus on creating additional opportunities in areas such as:

- **Visual Merchandising**: Interns will assist with creating attractive displays and store layouts that drive sales and improve customer experience.
- **E-commerce and Digital Strategy**: As UGS expands its online presence, we aim to offer internships that provide experience in managing e-commerce platforms, digital marketing, and analytics.
- **Event Coordination**: Internships in event planning will allow students to work on coordinating special events and promotions, both on-campus and online, for the UMW community.

## BENEFITS FOR UMW STUDENTS

- **Real-World Experience**: Students will gain direct exposure to the retail industry and marketing, which will significantly enhance their resumes and job prospects post-graduation.
- **Networking Opportunities**: Interns will have the chance to network with professionals in marketing, retail management, and other departments, forming valuable connections that can lead to future career opportunities.
- **Career Development**: UGS offers career coaching, resume-building support, and interview preparation to help students transition from their internships into full-time employment, whether at UGS or with other companies.

UGS is excited to offer University of Mary Washington students a range of internship opportunities that will provide meaningful, hands-on experience in the retail and marketing sectors. Our Marketing Internship Program is designed to develop the next generation of marketing professionals by offering students the chance to apply their academic knowledge in a professional setting, while also contributing to UGS's overall success. By continuing to expand these opportunities, UGS is committed to fostering student growth and preparing them for successful careers in the retail industry.

# F. CUSTOMER SERVICE:

## 1. PROVIDE AN IN-DEPTH OVERVIEW OF YOUR CUSTOMER SERVICE PHILOSOPHY, INCLUDING TRAINING PROGRAMS FOR STAFF AND ANY UNIQUE SERVICE PROPOSITIONS.

Both Ambassador and UGS provide a high level of customer service, providing the support your staff, students and faculty need in a timely and professional manner.

### AMBASSADOR'S CUSTOMER SERVICE APPROACH

Ambassador demonstrate the highest level of trouble shooting and resolution skills, always acting in the best interest of you and your students. We have been praised by our partners for our **professionalism, promptness, proactive nature, open communication, and overall genuine care**. We believe that if we are going to do a job, we are going to do it right. Our clients will attest to this. Our clients and their students are our top priority, we understand their programs and goals, and we honor our commitments.

At Ambassador, we ease operations throughout the entire course materials lifecycle. We do all the heavy lifting, relieving the burden from your team. All operations are backed by our trustworthy account management team. From **daily support to high level scalability and growth planning**, Ambassador's dedicated account management team is there for you every step of the way, developing a customized program that works for you and your students. We are accountable to you, and we want your program to reflect you. Our partnership approach has led to our **99% client retention rate**.

> *"Our account representatives at Ambassador are really an extension of our own team. They have an intimate understanding of our operations and our goals and they believe in open and regular communication. Ambassador is a stellar example of what it means to be a partner and not just another vendor."*
>
> Centura College

You will have the following Ambassador team members at your service:

- **Senior Client Services Manager:** maintains partnerships with your personnel, and develops new methodologies and work practices
- **Client Services Manager:** handles procurement of all your course materials, ensures timely fulfillment, and collaborates with publishers on your behalf
- **Client Service Specialists:** performs quality control on your booklists, monitoring edition changes, pricing and mark-ups, and inventory
- **Procurement Manager:** oversees all non-book related items, and actively negotiates better prices while ensuring the highest quality products
- **Business Engineering and Technology:** oversees special requests, additional reports, and/or custom integrations and projects
- **Data Analytics:** provides dedicated support to your staff and leaders, including support focused on understanding and using course materials data
- **Distribution Services:** works closely with your account team to meet standards and deadlines; receives, stocks, picks, packs, and ships materials
- **Business Development Team:** continues to build relationships, identifies evolving business process needs, and presents new solutions and services
- **Marketing Support:** creates and executes marketing/communication plans, trainings and instructional support
- **Logistics:** provides oversight of all ship carrier processes

- **Returns:** provides oversight and execution of the returns process

> *"We are continually impressed with our account team's agility, able to meet sudden unexpected needs quickly and with minimal direction."*
> -Ambassador Client since 2010

> *"Transparency and honesty, which is critical to long-term success, has been a foundation of our business relationship since the beginning, and continues to be a loadstar as we work on new solutions going forward."*
> -Ambassador Client since 2013

> *"Everyone we work with is not only knowledgeable, but friendly, courteous, and pleasant to work with - this extends up and down the ladder."*
> -Ambassador Client since 2018

At Ambassador, we take pride in the level of support our customer service teams provide, and their overall commitment to ensuring that students and faculty have someone in their corner to field questions and explain processes in a timely manner. Our customer service teams engage in regular, targeted training opportunities and we seek to create an atmosphere that allows them to feel a genuine sense of pride and accomplishment. All inquiries are reviewed regularly to ensure the highest levels of support.

### UGS CUSTOMER SERVICE

As mentioned earlier in this proposal, UGS take customer service very seriously. Upon the awarding of the contract, we will produce and publish a survey to the University of Mary Washington community asking for feedback regarding what they would like to see in their University of Mary Washington Gear Shop. Additionally, each customer that makes a purchase with the University of Mary Washington Gear Shop will be invited to participate in a short survey to inform us of their shopping experience. We use this feedback to learn how we can better serve the community and implement action steps that assure follow-through and continuous improvement.

### OPERATIONAL EXCELLENCE

Through our continuous improvement efforts, we build and maintain efficient processes that produce tangible results in time and cost savings. We adopt a mindset of problem solving, teamwork, and top-line growth, allowing us to create more value for you. The drive to keep improving allows our team to have the capacity to pursue innovation and growth.

We incorporate lean principles of evolutionary change and continuous process improvement rooted in a fundamental respect for people. Our teams regularly examine business processes to simplify and accelerate the path to delivering value to our customers. This creates a self-reinforcing feedback loop between the UGS team and our customers that helps identify and mitigate barriers to progress and creates shared success.

### CULTURE

We are committed to a positive culture that focuses on customers' needs and empowers staff. Our motivated staff members have a clear understanding of the goals and plans, feel secure in taking the initiative, and collaborate on ways to drive your brand.

### 2. EXPLAIN THE METHODS YOU WILL USE TO EVALUATE AND ENSURE CUSTOMER SERVICE EXCELLENCE.

UGS connects with students, staff, faculty, and alumni in ways that increase campus and online relevance and drive sales. We pride ourselves on our ability to listen to the customer, benefit from their wisdom, and act upon their feedback and input. Because your campus is unique, our first step is to survey our University of Mary Washington customers to learn:

- What they like and dislike in a campus gear shop. Knowing what keeps them coming back is the secret to our success and building loyalty through word-of-mouth advertising and referrals is key to creating lasting relationships.


- Their level of satisfaction with the current store and what they would look for in a new, reimagined store.
- The most effective way to communicate about store events, specials, and new products. We want to reach out to our customers in ways that they want to receive communication.
- What products they need and want. Their help in spotting trends and their input on the items they want stocked in the store will help us stay ahead of the curve in terms of fashion and function.

The second step is to analyze the feedback and develop an in-depth transition and marketing plan based on demographic and survey data. Finally, we will stock the store and website with the products our customers want and create a customer service experience that builds loyalty and keeps them coming back for more, even after graduation.

After we open our doors, we will continue to solicit feedback through:

- Customer surveys using effective, easy-to-use, web-based surveying tools
- Online feedback from the University of Mary Washington Gear Shop website
- Customer forums and interviews
- Social media polls and post observations

We are open to customer feedback and understand how it guides and informs our decision-making and influences our merchandise mix, technology platforms and overall customer service. By acting on the feedback we are making the shopping and buying experience better for all, increasing our engagement with the campus community and driving sales.

Each year, UGS will deliver an Annual Partnership Review (APR). This review will be presented to the Gear Shop's direct campus contact and an audience of their choosing. The review will highlight the prior year's fiscal performance in addition to the marketing efforts, promotions, special events and community involvement. We believe communication, feedback and response are cornerstones to a successful partnership. Presenting the APR annually will provide the feedback we need to exceed your expectations.

### 3. DETAIL HOW YOU PLAN TO ENGAGE WITH CAMPUS STAKEHOLDERS TO UNDERSTAND AND MEET THEIR NEEDS, ENSURING FEEDBACK LOOP FOR CONTINUOUS IMPROVEMENT.

Ambassador routinely collects feedback via surveys from students and faculty regarding course materials processes and technologies. Additionally, our team will coordinate user group meetings to review current systems and processes. We also gather feedback through our trainings. Specifically, when there is an opportunity to talk to faculty about their usage of digital materials and analytics, we share strategies and best practices with other faculty so they can learn from each other and maximize digital usage and data, including engagement metrics.

While most student feedback is gathered via survey, Ambassador is happy to work with you to create additional opportunities to gather and assess student input and analytics. Additionally, our data analytics processes capture a massive amount of student engagement data that we can help you analyze as it relates to course materials, learning outcomes, and success rates.

UGS is committed to building strong, ongoing relationships with the University of Mary Washington campus stakeholders, ensuring that the needs of students, faculty, staff, and the broader university community are not only understood but met effectively. We recognize that a dynamic feedback loop is essential for continuous improvement, and our approach will involve regular engagement with stakeholders to inform decisions and drive initiatives that align with UMW's goals.

### ESTABLISHING REGULAR COMMUNICATION CHANNELS

- **Campus Store Advisory Committee**: UGS will create a **Campus Store Advisory Committee** composed of key stakeholders, including representatives from the student body (e.g., student government or student organizations), faculty, staff, and administration. This committee will meet quarterly to discuss store operations, product offerings, promotional events, and feedback on the overall campus store experience.
- **Surveys and Feedback Forms**: Regular surveys will be distributed to students, faculty, and staff to gather direct feedback on their needs and preferences regarding product selection, store services, and overall customer experience. These surveys can be conducted digitally via email, university platforms, or in-store kiosks to ensure easy access for all.
- **Online Feedback Channels**: UGS will maintain an easily accessible online feedback portal where stakeholders can share their thoughts, suggestions, and concerns at any time. This ensures that feedback is not limited to scheduled meetings or formal surveys but is an ongoing conversation.
- **Social Media Engagement**: UGS will actively engage with the UMW community through social media platforms (Instagram, Facebook, Twitter, etc.). By posting interactive content and encouraging comments, likes, and shares, UGS will maintain an active dialogue with students, alumni, and faculty, allowing for real-time feedback and engagement.

### UNDERSTANDING AND MEETING THE NEEDS OF STAKEHOLDERS

- **Student-Focused Initiatives**: UGS will ensure that the campus store offers a diverse range of affordable, high-quality products that meet the interests and needs of UMW students. This includes:
  - Offering affordable textbook and school supply options.
  - Expanding the range of university-branded merchandise, including apparel, accessories, and tech items.
  - Stocking items that reflect student interests and trends, as well as seasonal offerings for campus events.
- **Faculty and Staff Needs**: UGS will consult with faculty and staff members to understand their specific needs for academic supplies, professional attire, and campus-specific merchandise. Faculty and staff may also have specialized needs for items related to their departments, which UGS can address through customs or bulk orders.
- **Sustainability and Social Responsibility**: Recognizing the increasing importance of sustainability among UMW students and faculty, UGS will prioritize eco-friendly products and brands. Stakeholder feedback will guide the store's approach to offering more sustainable products such as reusable water bottles, sustainable apparel, and eco-friendly supplies.
- **Event Support and Collaboration**: UGS will collaborate with campus departments and student organizations to meet the needs for special events, fundraisers, and campus activities. This can include offering promotional merchandise, event-specific items, or pop-up retail opportunities at key locations on campus (athletic events, graduations, etc.).

### BUILDING STRONG RELATIONSHIPS WITH UMW STAKEHOLDERS

- **Regular Campus Store Events**: UGS will host events such as **"Meet the Staff"** days, store tours, and "town hall" meetings where students and staff can engage directly with store managers and staff. These events provide a platform for informal feedback and also foster a greater sense of community within the store.

- **Collaborative Campaigns**: UGS will collaborate with various student organizations, academic departments, and the alumni association to create targeted promotional campaigns, sales, and events. For example, student ambassadors can help with merchandise promotion, and faculty can partner with UGS to provide specialized items for their departments.
- **Engagement with UMW Leadership**: UGS will establish regular touchpoints with key university leadership, such as the Vice President of Student Affairs, Campus Services, and Sustainability Committees, to ensure alignment with broader university goals. This will allow UGS to tailor offerings and operations based on the strategic needs of the university.

### CONTINUOUS IMPROVEMENT THROUGH FEEDBACK AND ACTION

- **Ongoing Assessment and Reporting**: After each feedback cycle (e.g., surveys, committee meetings), UGS will analyze the responses and report back to stakeholders with actionable insights. This will show that UGS is not only listening but is actively making changes based on their input.
- **Adjusting Store Offerings and Policies**: Feedback regarding product selection, pricing, or store hours will be taken seriously and adjustments will be made to meet the evolving needs of the UMW community. For instance, if there is increased demand for certain types of merchandise or academic supplies, UGS will expand inventory or adjust the store layout accordingly.
- **Implementing Improvements Based on Data**: UGS will use both qualitative feedback and quantitative data (e.g., sales reports, customer satisfaction scores) to make informed decisions. For example, if certain product categories (like sustainable merchandise) receive positive feedback, UGS may expand the selection in those categories.

### CLOSING THE FEEDBACK LOOP

- **Transparency and Communication**: UGS will ensure that all feedback is acknowledged and addressed. After implementing changes based on feedback, UGS will communicate these improvements to stakeholders through channels such as newsletters, social media posts, or campus-wide announcements. This demonstrates that UGS values the input of UMW stakeholders and is dedicated to continuous improvement.
- **Follow-Up Surveys**: To ensure that changes are effective, UGS will conduct follow-up surveys or focus groups periodically to assess whether the adjustments have met the stakeholders' needs. This creates an ongoing cycle of feedback and improvement.

UGS fosters strong relationships with campus stakeholders and aims to continuously improve the campus store's offerings and services to meet the evolving needs of the University of Mary Washington community. Through regular communication, collaboration, and commitment to action based on feedback, UGS will not only ensure the success of the campus store but also contribute to the overall student experience at UMW.

## 4. DESCRIBE CUSTOMER SERVICE CAPABILITIES AND CONTACT METHODS FOR STUDENTS, FACULTY, AND STAFF.

### AMBASSADOR'S STUDENT SUPPORT FOR THE ONLINE BOOKSTORE

Ambassador makes it a priority to provide **the same trusted support students have come to know and expect from your school**. Ambassador's service representatives have the knowledge, information, and answers your students need, and they deliver it in a courteous, friendly, and helpful manner. We will work with you to establish your desired service levels and support options, hours of operations, chat features, additional phone call handling, language capabilities, and review of recorded interactions. **Ambassador will create a support schedule that meets your staff's and students' needs** both during rush/peak and non-rush/non-peak times.

Through the Online Bookstore, students have access to self-help tools for quick and easy resolution:

- Online FAQs and Online Student User Guides
- Password Reset Functionality
- My Account Tools, including Order History Review and Access Code Resend

Students have phone and email access to personnel who can answer questions, check status, and direct them through the process.

- **Email Support:** inquiries are automatically logged and routed to the appropriate contact; many replies are sent **within 2 hours on the same business day**.
- **Phone Support:** Students may request to be contacted by phone **at a specific date and time**.

**Sample Rush/Peak Time Support Schedule:**

| Live Phone Support | Scheduled Phone Support | Email Support |
|---|---|---|
| Monday thru Friday<br>9:00a.m. – 7:00p.m. EST | Monday thru Sunday<br>24 hours, 7 days a week | Monday thru Saturday<br>9:00 a.m.to 9:00 p.m. EST |

## AMBASSADOR'S FACULTY SUPPORT

Ambassador provides faculty with a reliable, helpful point of contact as well as an array of support options throughout the course materials adoption process to ensure they can find, evaluate, and adopt the course materials that best meet their needs. Your dedicated customer service team assists faculty and department leadership through the process of choosing, vetting, securing, and building the most effective content collection. We make every effort to ease the management of your booklist and new title adoptions to improve timeliness of adoption decisions and, consequently, student readiness.

Ongoing, in-depth training for new and existing faculty is provided to ensure the faculty's understanding of the adoption process and various tools. **Ambassador never charges for training sessions.** Trainings include webinars, on-campus sessions, online user guides, and videos.

Through our Communication Portal as part of our BookAT Online Adoption Tool, we can send faculty information on adoption timelines and criteria to keep faculty aware of next steps and encourage timely submissions. In addition, automated reminder emails can be set up for instructors and departments with outstanding adoptions or those with pending approvals. Should late adoptions arise, our team also works with faculty to confirm availability, procure items, and fulfill materials as quickly as possible.

## AMBASSADOR'S ADMINISTRATIVE SUPPORT

Ambassador's teams maintain close connections with your administrative staff. We maintain open lines of communication, and when an issue arises, it is handled immediately and/or escalated as necessary. Your requests don't get caught in the corporate ladder. Our Client Services team is empowered to act on our clients' behalf, and they have a direct line of communication to our executive team, who are engaged in each client account, so they can get things done.

We gain an intimate understanding of your challenges, act with the utmost professionalism, and genuinely enjoy what we do, which translates to a positive, supportive client experience. **The average tenure of our customer service staff is 19 years**. Our team has extensive experience implementing, launching, and supporting course materials programs of all sizes and scopes. They can help you maximize course materials opportunities through innovative ways to specifically address the current needs of your institution.

We will routinely coordinate user group meetings with your administrative staff to review current systems and procedures in place, and discuss recommendations to further customize our services, enhancing student and faculty experiences and easing administrative functions.

As part of your implementation/transition services, in-depth training is provided to faculty and administrators to ensure an understanding of Ambassador's booklist adoption functionality, Book IT or BookAT. As needed, Ambassador provides in-depth additional training through webinars, on-campus sessions, online user guides, and videos. Specifically, our Client Services team is always available to help your administrative staff navigate and maximize usage of RODA, including all the standard and custom reports available. Whether your team needs a general overview or has specific questions about the kind of data analytics available, Ambassador can guide your staff to access information and analyze results.

### UGS SUPPORT FOR THE ON-CAMPUS STORE

UGS is committed to providing exceptional customer service to all members of the University of Mary Washington (UMW) community, including students, faculty, and staff. We understand that high-quality customer service experience is essential to the success of our operations and to fostering a positive relationship with campus stakeholders. Our customer service approach focuses on accessibility, responsiveness, and personalized support to meet the diverse needs of the UMW community.

### IN-STORE CUSTOMER SERVICE

UGS staff will provide on-site assistance to all campus store visitors, including:

- Friendly and Knowledgeable Staff: All customer service associates will be trained to assist with merchandise inquiries, product recommendations, textbook purchasing, and other store-related questions. Staff will also be trained to provide detailed information about university-branded items, ensuring that students, faculty, and staff can find exactly what they need.
- Quick Checkout: UGS will ensure that checkout processes are streamlined with enough cash registers and mobile point-of-sale systems to avoid long lines, especially during peak hours such as the start of the semester.
- Special Requests: For any specific product needs or inquiries (e.g., customized merchandise, out-of-stock items), the store will have a system in place to place special orders or reserve products for customers.
- Return and Exchange Assistance: UGS will provide clear guidelines for product returns and exchanges. A dedicated counter for returns will be available with staff ready to assist in processing returns or exchanges efficiently.

### ONLINE CUSTOMER SERVICE

UGS is committed to making customer service accessible even outside the physical campus store. Online support includes:

- Email Support: A dedicated customer service email address will be available for students, faculty, and staff to reach out with any questions, feedback, or issues. UGS commits to responding to all emails within 24-48 hours, ensuring timely support. Email responses will be personalized to the nature of the inquiry, whether it's related to product inquiries, returns, order status, or special requests.
- Online Order Assistance: UGS will provide clear guidance for navigating the online store, including help with placing orders, shipping options, and payment issues. If customers have trouble with online purchases, they can contact customer support for troubleshooting.

### PHONE SUPPORT

- Phone Line: UGS will be available during business hours for any inquiries, orders, or concerns related to the campus store. Faculty, staff, and students can call to ask about inventory, place orders over the phone, or seek assistance with returns and exchanges.

UGS will ensure that the phone line is staffed by knowledgeable representatives who can provide prompt and helpful responses.
- Call Back Requests: If phone lines are busy, UGS will offer a call-back option for customers, ensuring they don't have to wait on hold for extended periods. Customers can leave a message with their contact information, and a customer service representative will call back at a time that's convenient for them.

### SOCIAL MEDIA AND DIGITAL PLATFORMS

UGS will actively monitor and engage with customers through various social media platforms (e.g., Facebook, Instagram) to provide customer support and answer questions. Social media will serve as a platform for quick inquiries, store updates, product promotions, and general communication.

- Social Media Direct Messaging: Customers can message UGS directly on social media for inquiries or support. UGS will respond within 24 hours to resolve issues or provide information.
- Social Media Engagement: Regular posts will also highlight popular products, store events, and special promotions, giving customers a chance to interact with UGS and stay informed about the latest store updates.

### FEEDBACK AND SUGGESTIONS

- Online Feedback Form: UGS will implement an online feedback form on the website where students, faculty, and staff can submit suggestions, complaints, or feedback regarding their campus store experience. This form will be simple to use and provide a way for all stakeholders to share their opinions. The responses will be regularly reviewed to ensure continuous improvement in customer service.

### ACCESSIBILITY AND INCLUSIVITY IN CUSTOMER SERVICE

UGS will ensure that customer service is accessible to all, including individuals with disabilities:

- Assistance for Customers with Disabilities: UGS will ensure that all areas of the campus store are accessible to individuals with physical disabilities, including ramps, wide aisles, and accessible counters. Staff will be trained to offer assistance to those who need it.
- Alternative Formats for Communication: UGS will be mindful of customers who require specific communication methods (e.g., hearing or visually impaired). Options for communication through email or other assistive technologies will be made available to ensure that all customers receive the support they need.
- Language Support: UGS will assess the diversity of the UMW community and offer language support where necessary to ensure that non-native English speakers have access to services and assistance.

### CUSTOMER SERVICE TRAINING FOR UGS STAFF

UGS will invest in training for all customer-facing staff, ensuring they possess the skills to:

- Handle inquiries efficiently and professionally.
- Resolve conflicts and manage difficult situations with patience and empathy.
- Ensure that all customers feel heard, respected, and valued.
- Provide product recommendations based on customer needs and preferences.
- Utilize technology to improve service, including online chat tools, POS systems, and inventory management.

UGS's customer service capabilities are designed to be comprehensive, responsive, and easily accessible to all members of the University of Mary Washington community. Whether students, faculty, or staff are visiting the campus store in person, engaging with UGS online, or reaching out for support via phone or social media, UGS is committed to providing an outstanding experience. By offering multiple contact methods and personalized support, UGS aims to meet and exceed the expectations of the UMW community.

## 5. INCLUDE INFORMATION ON DIGITAL PLATFORMS FOR ORDER MANAGEMENT (IN AND OUT OF STORE) AND HOW THESE PLATFORMS ENHANCE THE CUSTOMER EXPERIENCE. DISCUSS THE ABILITY FOR STUDENTS TO MANAGE THEIR ORDERS ONLINE (UPGRADE, EDIT, CANCEL).

### AMBASSADOR'S ONLINE BOOKSTORE ORDERING PROCESS

Ambassador's Online Bookstore allows students to order materials from anywhere, anytime, streamlining ordering, payment, and fulfillment. This gives you peace-of-mind that your students are well supported, while also creating **efficiencies and checks and balances not found in typical online bookstore solutions**.

#### Step 1: Visit the Online Bookstore

Students connect to the Online Bookstore through Single Sign-On/LMS or student portal, or login or shop as a guest directly through the Online Bookstore link.

#### Step 2: Select Materials

Students review all available formats for an item (new, used, rental, marketplace, and digital), confirm pricing, and add the selected item(s) to the cart. We can turn on our "No-Duplicate" feature, which prevents students from purchasing the same item if they already have it from a previous term/course.

#### Step 3: Review Cart

Students review real-time stock availability. If an inventoried item is not in stock, students can either keep or remove the item. While rare, backorders are automatically filled once the item is available without any further involvement from the student or your team.

#### Step 4: Select Shipping Preference

Students select their preferred shipping option to their home or campus using USPS Ground Advantage, USPS Economy, UPS SurePost, UPS Ground, or UPS Next Day/Second Day.

#### Step 5: Pay For and Confirm Order

Students can use multiple forms of payment or combination of payment types, including credit cards, PayPal, debit cards, and financial aid payment or vouchers. Students will see their current financial aid/voucher balances in the top right corner throughout the ordering process. Purchases exceeding the approved voucher spending limit can be completed with a credit/debit card. You may restrict which items may or may not be paid for by voucher. Students will receive confirmations (with tracking) upon order completion and shipment.

Students can review and track the status of all orders 24/7 by utilizing the "Order History" feature on the Online Bookstore, and they will receive three customized confirmations and notifications:

1. Upon order completion
2. Upon shipment
3. Upon delivery

Through the Online Bookstore, students have access to self-help tools for quick and easy resolution. This includes:

- Online FAQs and Online Student User Guides
- Password Reset Functionality
- My Account Tools, including Order History Review and Access Code Resend

Students can use self-help tools to return items that have been purchased and cancel any backordered items. If a student desires to cancel an order that is still in process, they can enter a customer service ticket and our team will work to intercept the order if possible. Because of our commitment to shipping orders on the same day that they come in, this may not always be possible.

# G. ASSESSMENT:

## 1. DETAIL YOUR MAIN APPROACH TO CONDUCTING CUSTOMER SURVEYS, INCLUDING THE METHODS, FREQUENCY, TOOLS, AND INSTRUMENTS YOU'LL USE TO GAUGE CUSTOMER PREFERENCES AND SATISFACTION LEVELS.

Ambassador routinely collects feedback via surveys from students and faculty regarding course materials processes and technologies. Additionally, our team will coordinate user group meetings to review current systems and processes. We also gather feedback through our trainings. Ambassador will work with your school on your desired level of frequency.

Additionally, as mentioned, UGS conducts a robust three step process to gather input from stakeholders and connect with students, staff, faculty, and alumni in ways that increase campus and online relevance and drive sales. We pride ourselves on our ability to listen to the customer, benefit from their wisdom, and act upon their feedback and input. Because your campus is unique, our first step is to survey our UMW customers to learn what they like and dislike, their level of satisfaction, communication preferences and product demands.

The second step in UGS's feedback loop is to analyze the feedback and develop an in-depth transition and marketing plan based on the demographic and survey data. Finally, we will stock the website with the products our customers want and create a customer service experience that builds loyalty and keeps them coming back for more, even after graduation. Additionally, each year, UGS will deliver an Annual Partnership Review (APR).

## 2. FIRM SHALL COMMIT TO SHARING SURVEY RESULTS AND OTHER RELEVANT PERFORMANCE METRICS WITH UMW BUSINESS SERVICES.

Ambassador and UGS acknowledge and agree with this statement and will share survey results and any other relevant data in order to continually improve operations, offerings, and support.

## 3. DESCRIBE YOUR FORMAL PROCEDURE FOR ADDRESSING COMPLAINTS, EMPHASIZING HOW YOU RESPOND TO NEGATIVE FEEDBACK.

Both Ambassador and UGS take pride in the level of support they provide and will work to immediately respond to and rectify any negative feedback. We will work with your school to set up meetings with the appropriate daily and senior level contacts to make sure concerns are heard and addressed.

At UGS, we understand that addressing complaints and responding to negative feedback promptly and effectively is crucial for maintaining a positive relationship with the University of Mary Washington (UMW) community. Our formal procedure ensures that all concerns, whether minor or significant, are handled in a professional, fair, and timely manner. We view feedback, both positive and negative, as an opportunity for continuous improvement, and we are committed to resolving issues in a way that aligns with the best interests of UMW students, faculty, and staff.

### 1. COMPLAINT SUBMISSION AND ACKNOWLEDGEMENT

- **Multiple Channels for Feedback**: UGS offers various methods for customers to submit complaints, including:
    - **In-Store**: Complaints can be addressed directly to customer service representatives or store managers at any time.
    - **Online**: An online complaint form will be available on the UGS website, allowing customers to submit concerns at their convenience.
    - **Email**: A dedicated customer service email address will be set up for complaints and feedback.

  - **Phone**: Customers can call the UGS customer service line to express complaints or concerns.
  - **Social Media**: Negative feedback submitted via social media will be handled with care and professionalism.
- **Acknowledgement of Complaints**: Upon receiving a complaint through any channel, UGS will acknowledge receipt of the complaint within 24-48 hours. This can be through an automatic response for online submissions or a direct acknowledgment for in-person or phone complaints. A personalized response will be issued within a reasonable timeframe, detailing how the issue is being addressed.

### 2. ASSESSMENT AND INVESTIGATION

- **Investigation of the Complaint**: The next step is a thorough review of the complaint. This involves:
  - **Gathering Information**: UGS staff will collect all relevant details about the complaint, including product information, purchase history, customer interactions, and any other pertinent factors.
  - **Assessing the Validity**: Each complaint will be evaluated to determine its validity, considering the store's policies, the nature of the complaint, and any past precedents. In some cases, store management may need to consult with other departments (e.g., inventory, finance, marketing) to understand the issue fully.
- **Escalation if Needed**: If the complaint involves a complex or serious issue (e.g., major product defects, a service failure that impacts many customers, or a financial dispute), it may be escalated to senior management for further review and resolution.

### 3. RESOLUTION PROCESS

- **Timely Response**: UGS is committed to resolving complaints in a timely manner. A typical response time will be 3-5 business days from the receipt of the complaint, depending on the complexity of the issue.
- **Personalized Solutions**: UGS strives to offer solutions that are fair, reasonable, and tailored to the individual complaint. Possible resolutions include:
  - **Refunds**: If a customer is dissatisfied with a product or service, UGS will offer a refund or exchange according to store policies.
  - **Replacement Products**: If the complaint involves a defective product, UGS will replace the item or offer a comparable alternative.
  - **Store Credit or Discounts**: In certain situations, UGS may offer store credit or discounts as a gesture of goodwill, particularly for complaints related to product dissatisfaction or service delays.
  - **Apologies and Reassurance**: In cases where the customer's experience was below expectations, a formal apology from UGS management will be issued, assuring them that steps will be taken to prevent similar issues in the future.
- **Customer Notification**: Once a solution has been determined, the customer will be informed of the steps that will be taken. This could be through email, phone, or in person, depending on how the complaint was initially submitted.

### 4. FOLLOW-UP AND CONTINUOUS IMPROVEMENT

- **Follow-Up Communication**: After a complaint is resolved, UGS will follow up with the customer to ensure their satisfaction with the resolution. This step ensures that the issue has been adequately addressed and that the customer's concerns have been fully resolved.
- **Feedback on Resolution**: UGS will ask customers for feedback on how the complaint was handled and the resolution offered. This feedback will be used to assess the effectiveness of the resolution process and make improvements where necessary.
- **Documenting Complaints and Trends**: UGS will keep detailed records of all complaints and their resolutions. This documentation helps track recurring issues, allowing the company to identify patterns and implement long-term solutions to prevent future complaints.

- **Continuous Improvement**: Complaints will be analyzed for any systemic issues or operational weaknesses. UGS will use this information to improve product offerings, customer service processes, and store policies to prevent similar complaints in the future. This feedback loop ensures that UGS continuously evolves and improves the customer experience.

### 5. TRAINING AND EMPOWERING STAFF

- **Customer Service Training**: UGS will ensure that all customer-facing staff are trained in handling complaints professionally and empathetically. Staff will be equipped with the tools and knowledge to manage complaints at the point of contact and resolve simple issues quickly.
- **Empowerment for On-the-Spot Resolution**: UGS will empower frontline staff to address common complaints on the spot (e.g., processing a return, issuing an exchange, or offering a discount) without needing to escalate every issue. This speeds up the resolution process and allows customers to feel heard and valued.

### 6. COMMITMENT TO TRANSPARENCY

- **Clear Communication of Policies**: UGS will ensure that all store policies, especially return and exchange policies, are clearly communicated to customers, both in-store and online. This helps set expectations upfront and reduces misunderstandings that can lead to complaints.
- **Transparency in Handling Complaints**: UGS is committed to providing clear explanations to customers about the steps taken to resolve their complaints and any changes that have been made to avoid similar situations in the future.

UGS values all feedback, especially negative feedback, as it presents an opportunity for growth and improvement. By adhering to a formal complaint resolution process that emphasizes responsiveness, fairness, and continuous improvement, UGS ensures that all complaints are taken seriously and addressed promptly. We strive to turn negative experiences into positive outcomes, strengthening our relationship with the University of Mary Washington community and enhancing the overall customer experience.

## 4. OUTLINE THE SPECIFIC STEPS YOUR FIRM WILL TAKE TO ADDRESS AND RESOLVE ANY PERFORMANCE ISSUES THAT MAY ARISE DURING THE CONTRACT TERM.

Ambassador takes great pride in the level of support it provides and will work to immediately respond to and rectify any performance issues. We will work with your school to set up meetings with the appropriate daily and senior level contacts to make sure concerns are heard and addressed. As mentioned, your requests, inquiries and concerns don't get caught in the corporate ladder. Our Client Services team has the authority to get things done, backed by a direct line of communication to our executives who are engaged in each client account.

UGS is committed to ensuring that all aspects of the campus store operations at the University of Mary Washington (UMW) meet or exceed expectations throughout the contract term. If performance issues arise, UGS will follow a structured approach to address and resolve them promptly, efficiently, and transparently. The following outlines the specific steps UGS will take to resolve performance issues:

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### IDENTIFICATION AND ACKNOWLEDGMENT OF PERFORMANCE ISSUES

- **Proactive Monitoring**: UGS will continuously monitor all aspects of store operations, including inventory levels, customer service, sales performance, and feedback from UMW stakeholders (students, faculty, staff, etc.). Regular assessments will allow UGS to identify potential performance issues before they become significant problems.

- **Feedback from Stakeholders**: UGS will maintain open lines of communication with UMW stakeholders (including students, faculty, and staff) to capture any complaints, concerns, or suggestions related to store operations. This will include feedback through surveys, direct emails, focus groups, and customer service interactions.
- **Internal Reporting**: UGS's management team will conduct internal reviews on a regular basis, evaluating performance metrics (e.g., sales targets, customer satisfaction scores, and inventory management). This will help identify discrepancies between expected and actual performance.
- **Immediate Acknowledgment**: When a performance issue is identified, UGS will acknowledge it promptly, whether it comes from internal assessments or stakeholder feedback, and notify the relevant UGS team members and UMW leadership.

## INVESTIGATING AND ASSESSING THE ROOT CAUSE

- **Root Cause Analysis**: UGS will conduct a thorough investigation to determine the underlying causes of the performance issue. This may involve:
  - Reviewing the relevant operational data (sales, stock levels, etc.).
  - Analyzing feedback and complaints from customers, faculty, or staff.
  - Engaging in discussions with staff members and stakeholders who may have direct insights into the issue.
  - Consulting with UMW leadership, if necessary, particularly for issues that may affect the broader university community.
- **Collaboration with UMW**: For complex issues, UGS will work directly with UMW representatives (such as administrators, faculty, or student leaders) to gain a more in-depth understanding of the problem and any specific concerns the university may have.

## DEVELOPING AND IMPLEMENTING A CORRECTIVE ACTION PLAN

- **Immediate Corrective Actions**: Based on the root cause analysis, UGS will implement short-term corrective actions to mitigate the issue as quickly as possible. These actions may include:
  - **Customer Service Issues**: Additional staff training, adjustments in store procedures, or changes to the customer service approach.
  - **Inventory Issues**: Restocking popular items, adjusting ordering processes, or addressing any supply chain disruptions.
  - **Operational or Logistical Issues**: Modifying store hours, enhancing checkout processes, or improving store layout for better traffic flow.
- **Long-Term Corrective Actions**: UGS will also establish longer-term actions to ensure that similar issues do not recur. This may involve:
  - **Process Improvements**: Implementing changes to policies, procedures, or workflows based on lessons learned.
  - **Staffing Changes**: If staff performance is identified as a key issue, UGS will consider additional training, reassignments, or, if necessary, staffing adjustments.
  - **Technology Upgrades**: Implementing or upgrading systems that help monitor inventory levels, track sales trends, or improve customer service.

## COMMUNICATION WITH UMW LEADERSHIP AND STAKEHOLDERS

- **Transparent Communication**: UGS will inform UMW leadership about the identified performance issue, the corrective actions taken, and the timeline for resolution. This will ensure transparency and keep university stakeholders informed throughout the process.
- **Regular Updates**: UGS will provide ongoing updates on the progress of corrective actions, including any changes made and the results of those changes. These updates can be shared through regular meetings with UMW leadership or through written reports.
- **Stakeholder Involvement**: Where appropriate, UGS will engage key stakeholders, including students, faculty, and staff, in the resolution process by seeking their feedback on whether the issue has been adequately addressed and whether additional adjustments are needed.

### MONITORING AND EVALUATING THE EFFECTIVENESS OF THE SOLUTION

- **Continuous Monitoring**: After implementing corrective actions, UGS will monitor the situation to ensure that the issue is resolved and does not recur. This will involve tracking performance metrics, reviewing customer feedback, and observing changes in store operations.
- **Stakeholder Feedback**: UGS will reach out to relevant stakeholders (students, faculty, staff) to solicit feedback on the effectiveness of the corrective actions and whether their concerns have been adequately addressed.
- **Adjustments as Needed**: If the initial corrective actions do not fully resolve the issue, UGS will make further adjustments based on ongoing monitoring and feedback from stakeholders.

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### PREVENTIVE MEASURES AND CONTINUOUS IMPROVEMENT

- **Root Cause Prevention**: UGS will implement long-term preventive measures to reduce the likelihood of similar performance issues arising in the future. These measures may include:
  - **Refining Operational Processes**: Streamlining processes, such as inventory management, sales forecasting, and customer service protocols, to ensure better performance.
  - **Employee Training and Development**: Continuing staff training and development to ensure that all employees have the necessary skills and knowledge to meet store expectations.
  - **Review of Store Policies**: Evaluating and updating store policies to ensure that they remain aligned with UMW's needs and the best interests of customers.
- **Feedback Loop**: UGS will continue to engage with UMW stakeholders on a regular basis to solicit feedback and ensure that store operations are consistently improving. This feedback will serve as an ongoing source of data to drive improvements and prevent future performance issues.

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### FINAL RESOLUTION AND REPORTING

- **Final Review and Confirmation**: Once performance issues are resolved, UGS will conduct a final review to confirm that all actions have been completed and that the issue has been fully addressed. UGS will seek confirmation from UMW leadership and relevant stakeholders to verify the resolution.
- **Report on Actions Taken**: UGS will prepare a formal report outlining the nature of the performance issue, the steps taken to address it, and the results achieved. This report will be shared with UMW leadership to demonstrate accountability and ensure transparency.

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UGS is committed to addressing any performance issues that arise during the contract term in a proactive, transparent, and effective manner. By following a structured approach, UGS ensures that any challenges are quickly identified, thoroughly investigated, and resolved with long-term solutions to prevent recurrence. Regular communication with UMW leadership and stakeholders, combined with a focus on continuous improvement, will ensure that UGS meets and exceeds the expectations of the UMW community throughout the contract period.

# H. COURSE MATERIALS:

### 1. GENERAL

### A. ELABORATE ON YOUR COMPREHENSIVE COURSE MATERIAL SERVICES, EMPHASIZING NEW, USED, AND RENTAL PHYSICAL AND DIGITAL OFFERINGS, AND INCLUDING BUT NOT LIMITED TO LABORATORY AND ART SUPPLIES.

When schools think of course materials, often they only think about textbooks and eBooks. The truth is, at Ambassador we do so much more. Because we have relationships with more than 1,000 publishers and vendors, we source the materials you want, when you want them. We bring all resources and all formats together in **each client's dedicated inventory**. Beyond textbooks and eBooks, this includes devices (laptops, tablets), custom content, OER, uniforms, science kits, supplies, scrubs, labs, apparel, graduation regalia and any other non-book items, as well as unique and hard-to-find things. Our experienced procurement team will source any item you need, and our incredible buying power allows us to pass the savings onto you.

We will work with you to leverage enrollment numbers, historical sales data, and industry best practices to determine the appropriate quantities to carry. We purchase your materials in advance from your preferred vendors and store **dedicated inventory for your school** in our distribution centers so we can guarantee availability and process orders within the same/next business day.

### NEW TEXTBOOKS

Ambassador offers lower student pricing than our competitors on new textbooks. We leverage our publisher relationships, negotiating powers, dynamic pricing controls, and transparent pricing models to ensure the lowest prices (which can average between 5% and 20% below publisher list price depending on your school's revenue goals and decisions).

### USED TEXTBOOKS

Ambassador's used textbook program is adaptable based on your needs and provides students with another low-cost option. As with other course materials, Ambassador stocks used books with your dedicated inventory warehoused in our distribution centers to ensure availability.

### RENTAL TEXTBOOKS

We continually review and add rental titles to our offerings to provide students yet another way to save money. Rentals are displayed based on current offerings and inventory availability, and students can view available options, including length of use.

### MARKETPLACE

Ambassador provides access to millions of marketplace titles. Our Marketplace Partner specializes in the sale of over 200 million new, used, and rare books, as well as music and movies, providing the world's largest independent marketplace connecting buyers and sellers. Ambassador's clients have full access to this inventory from thousands of dependable, high-quality sellers, both large and small, representing 20 million unique ISBNs. This partnership ensures students have timely access to the books they need, at the best possible prices.

Ambassador's partnership is significant on several levels, supporting schools, stores and students, while also complementing Ambassador's robust Buyback program, which provides strong and varied used book inventory. For example, what happens if your used book inventory does not accommodate all your students? What happens if a professor changes a book after you have placed the order? What happens if an entire class is dropped? Situations like these can leave a student without a book or your school holding obsolete inventory. Together, Ambassador and its Marketplace Partner work to get titles into students' hands and give your school a viable channel to buy and sell inventory.

### DIGITAL MATERIALS

Ambassador manages the entire digital content process, easily connecting students to the online course materials they need through their LMS or your preferred digital or publisher platform. RODA, our Course Materials Platform, aggregates millions of digital options and applications through one easy-to-use platform. Students have straightforward access to digital materials without jumping from one system to the next and your team doesn't have to manage and maintain endless integrations.

Ambassador's has your school covered from start to finish.

✓ We work with publishers to secure materials.
✓ We handle all aspects of Inclusive Access and Equitable Access programs.
✓ We manage your school's digital catalog, licenses, fulfilment, opt-outs, devices and more.

With access to more than 1,000,000 digital resources, Ambassador manages the entire digital content rollout process for eBooks, Access Codes, Codeless Access, Publisher Direct, Courseware, and other interactive digital resources. Additionally, **Ambassador is one of the largest education bookstore distributors of eBooks through VitalSource**.

We assist in the selection of digital materials and work with publishers to secure items and access. We manage your digital catalog, licenses and eReader accounts, including automatic license code redemption, cancellation and reconciliation. We also ease the management of course adds and drops, students using digital materials for multiple classes and/or semesters, and students wanting to purchase a Print-on-Demand version of their digital item.

Our solution provides **Single Sign-On access or automatic fulfillment** to simplify delivery. Through integrations with your LMS and SIS, students can easily access all digital content in a simplified, unified experience. We also assist students with lost Access Code retrieval.

Ambassador simplifies ordering, tracking and account and license management, including:

- Automatic student account creation for first time eBook purchases
- Automatic redemption of eBook license codes
- Customized email templates to tailor student communications and eBook fulfillment
- Student license management tools for admins to view, maintain, cancel and report on
- Correct student email addresses and reset student passwords
- Conversion of additional print textbooks to eBooks, along with custom pricing and license durations with the publishers
- Detailed data analytics to gauge student digital materials usage, study habits and time, course progress and more so you can proactively support students

Ambassador provides complete transparency for all digital materials. Our Course Materials Platform, RODA, aggregates, manages, and translates data from your SIS and/or LMS into enrollment-based financial analytics and reconciliations for students. Additionally, our No Duplicate/Drop functionality ensures students don't purchase an item if they already have an active digital license. All transactions are reconciled into consolidated, detailed invoices so you only pay what you owe (including LMS embedded Publisher Direct Content).

## SUBSCRIPTION MATERIALS

Ambassador provides access to subscription-based materials, including Cengage Unlimited and Pearson+. Ambassador's integrations enable students who purchase subscriptions to automatically retrieve digital materials through a simple and seamless process, broadening their options to cost-effective materials and supporting their digital literacy expectations.

## OER

Ambassador supports the entire Open Education Resources (OER) process for your staff and faculty, navigating logistics, systems, and management. Our expert team can help faculty find relevant and meaningful content and we can make recommendations, or faculty can create their own robust, customized collections of digital and print materials. We also maintain partnerships with OER providers, including OpenStax. We assemble and curate your content from OER, web articles, blogs, images, videos and publisher content, as well as your school's or an instructor's own content. Custom course packs are readily accessible and more affordable as Ambassador custom prints your content or converts it to a digital resource, as well as manages distribution.

### SCRUBS, KITS, LABS

Ambassador collaborates with you to strategize, promote, and provide access to uniforms (with or without embroidery), science kits, supplies, scrubs, and other non-book items, making sure your students are equipped with the necessary materials for hands-on coursework and labs. One of Ambassador's Senior Procurement Managers will work closely with you to obtain information about your specific needs and preferences, oversee all aspects of any non-book related items, provide samples for your review, and actively negotiate better prices while ensuring the highest of quality products.

### PRINT-ON-DEMAND

Ambassador makes Print-On-Demand (PODs) available for a nominal fee for students who have purchased the corresponding eBook. Students may purchase these professionally printed versions by school voucher or credit card depending on the school's preference. Ambassador manages the entire digital and POD process handling the following on your behalf:

- Acquires and manages content, securely stores and processes it for print
- Works with schools to customize the POD front and back cover, as well as the spine
- Authenticates each eBook purchase and provides students the option to order the POD
- Professionally prints and packages the POD per publisher and school specifications
- Verifies shipping address, and ships the POD version to the student or school, as specified by each school on the order
- Reports POD transactions to publishers and school and handles payments

### DEVICE PROGRAMS

Ambassador powers device programs, handling device ordering, fulfillment, management, analytics, and returns. **We are a Certified Apple Reseller** and have relationships with a variety of technology partners to provide devices and internet connectivity.

With Ambassador, you don't have to take on the oversight, inventory and cash outlay for expensive devices, while leveraging Ambassador's buying power to drive down costs. Ambassador's procurement team is constantly monitoring all aspects of the purchasing process with suppliers, including pricing and freight terms. We assess technical requirements and vendor customer service, as well as students' internet connectivity options.

Ambassador also provides device return and repurpose services. Returned devices undergo a three-step triage process to determine condition and whether or not the device is fit for resale, credit and ultimately disposition. Ambassador also manages student drops for courses and programs where devices have been provided and notifies the school when devices have not been returned so that the school can decide how to settle student accounts.

Ambassador provides standard and custom reports as part of any device program. New laptop program specific reports are available to your program manager and other authorized staff, as well as reports on device used inventory, campus inventory, device dispositions reports, serial numbers and activation codes reports for ancillary equipment (such as WiFi hotspots).

### 2. DESCRIBE ANY OTHER STUDENT AND FACULTY ACADEMIC MATERIALS AND SERVICES YOU OFFER.

As mentioned, Ambassador will source any materials your students and faculty need. Additionally, our DeskCopy-Connect solution takes the time-intensive, manual hassle away from schools and publishers having to manage the desk copy acquisition process themselves. DeskCopy-Connect authenticates a faculty member's credentials for a desk copy and delivers the data to the school or publisher to authorize and provision the textbook. Our no-duplicate order feature ensures that each faculty receives only one copy. Faculty can request an eBook desk copy for select texts through our Digital Advantage solution.

## A. DISCUSS YOUR APPROACH TO CUSTOM PUBLISHING AND COURSE PACKS.

### CONTENT LAB

Ambassador provides Custom Creation Services through our Content Lab, allowing educators to assemble a variety of relevant and engaging resources, which can save time and money, advance curriculum and improve outcomes. Content Lab enables schools to:

- Reduce student costs by providing only essential course content in a variety of economical formats, without the need for edition and price changes.
- Create custom, up-to-date course content from diverse sources, including Open Education Resources (OER).
- Dedicate more time to developing courses rather than updating content, while students receive convenient access to the most current and relevant materials.

Content Lab readily integrates content from a wide variety of sources, including a diverse library of publishers, web articles, blogs, Open Educational Resources (OER), as well as Word, PowerPoint and PDF files. Ambassador's Content Lab handles digital rights management for real-time copyright clearance for most materials. We custom print the content or convert it to a digital resource and distribution is managed through Ambassador's flexible service models. Bound books can be customized with hard or soft covers, colors, fonts, logos, titles, tables of contents, and more. Electronic files may be viewed online, as well as loaded onto a computer or a mobile device.

## B. DESCRIBE HOW YOU WILL SUPPORT THE UNIVERSITY'S COMPLIANCE REQUIREMENT WITH THE HIGHER EDUCATION OPPORTUNITY ACT (HEOA) OF 2008 SECTION 133; SPECIFICALLY EXPLAIN YOUR ROLE IN TRACKING AND REPORTING THESE REQUIREMENTS ON BEHALF OF THE UNIVERSITY.

Ambassador maintains HEOA compliance. In addition to our robust reporting tools available in RODA, our Online Bookstore Sell Price Report provides Course Code, ISBN, Title and Student Selling Price in compliance with federal recommendations for all course materials. Additionally, Ambassador provides a Pricing Calculator for students to calculate the cost of their course materials including sales tax and shipping without having to go through the ordering process.

## C. HOW WILL YOU INTEGRATE REGISTRATION OF THE SEMESTER WITH COURSE MATERIALS PURCHASES?

Ambassador's Course Materials Platform, RODA, interacts with your SIS to integrate student registration information and bookstore transactions. Student course registration information is loaded into the Online Bookstore and when students log on for the first time, their class list, the required course materials, and purchasing options are automatically and clearly displayed. The integration updates automatically to incorporate any changes to the required materials and accommodates for student add/drops, which significantly reduces the burden on your administrative staff. Ambassador can integrate with your systems utilizing an API infrastructure or a file-based data transfer, and frequently customizes these integrations for each client based on their specific needs.

## D. HOW DO FACULTY REGISTER COURSE MATERIALS ADOPTIONS FOR THEIR CLASSES?

Ambassador provides a best-in-class instructor experience with our online adoption tool, BookAT. We provide access to a comprehensive listing of millions of titles which are updated regularly so faculty are always in the know when it comes to availability, including outdated editions, out-of-print titles, OER materials, backorders, and substitutes. We provide faculty with detailed information, including price comparisons, so they can adopt the most relevant titles and/or the most appropriate substitutes. BookAT is easy for faculty to use, plus Department Heads can approve materials and view faculty who have not submitted adoptions within the optimal timeframe.

**I. CONFIRM THAT THE LIST OF ADOPTED MATERIALS WILL BE PROVIDED TO UMW SIMPSON LIBRARY STAFF FOR EACH SEMESTER AND SUMMER TERM.**

Ambassador will ensure library staff have access to the booklists for each term. We can also provide access to any of your school's approved staff to our course materials platform, RODA, where they can review and pull booklist reports.

**E. HOW MANY PUBLISHERS DO YOU DISTRIBUTE AND MANAGE ELECTRONIC CODE DELIVERY FOR: MCGRAW, CENGAGE, PEARSON, ELSEVIER, WILEY, OTHERS?**

Ambassador works directly with more than one thousand content and technology partners, wholesalers and educational publishers, including but not limited to Cengage Learning, Elsevier, McGraw Hill, Pearson, Wiley, Jones and Bartlett, FA Davis, EMC Paradigm, Hachette, Sage, and Taylor and Francis. Below is a sampling of our strategic partnerships.


**F. DESCRIBE YOUR FIRM'S SOURCES AND DISTRIBUTION METHODS FOR NEW, USED AND DIGITAL MATERIALS.**

A primary differentiator with Ambassador is our dedicated inventory approach. We purchase your materials in advance from your preferred publishers and vendors and store dedicated inventory for your school in our distribution centers – **your dedicated inventory is not shared with other schools or marketplace/eCommerce sites.**

- ✓ **Materials are available when your students need them.**
- ✓ **We invoice you as items are distributed, saving you the financial burden of inventory carrying costs.**

We leverage enrollment numbers, historical sales data, and industry best practices to determine your appropriate quantities. Your school will have its own space in our warehouse. Inventory is organized and separated by courses, unlike some of our competitors that store inventory (not by partner) by ISBN. **Our approach makes inventory management more accurate.** We can tell you exactly what is in stock in real time – no guessing or assuming inventory levels.

Since Ambassador carries a dedicated inventory for you, **most items are shipped together at one time and under a consistent shipping timeline guarantee**. This is an important consideration compared to other vendors that have multiple third-party vendors drop ship, therefore charging students shipping fees and adjusting delivery dates for each individual item.

## 3. PRICING

### A. EXPLAIN YOUR STRATEGIES FOR REDUCING FINANCIAL BURDENS ASSOCIATED WITH COURSE MATERIALS COSTS, SUCH AS RENTAL PROGRAMS, USED BOOKS, DIGITAL MATERIALS, AND OER.

#### I. DETAIL YOUR COMPREHENSIVE PRICING STRATEGY FOR NEW, USED, RENTAL, AND DIGITAL COURSE MATERIALS/COURSE MATERIALS, ENSURING A DIVERSE RANGE OF AFFORDABLE OPTIONS FOR STUDENTS.MATERIALS/COURSE MATERIALS, ENSURING A DIVERSE RANGE OF AFFORDABLE OPTIONS FOR STUDENTS.

Ambassador recognizes that every client has unique financial objectives that may change depending on their circumstances, therefore, you can set your own commission rate on the following items:

- **New Textbooks/Printed Access Codes**
- **Used Textbooks**
- **Rental Textbooks**
- **Coursepacks/PODs**
- **Custom eBooks and other digital items**
- **National Title eBooks**
- **Inclusive Access and Equitable Access**
- **All Non-Book Sales**

### AMBASSADOR'S PRICING MODEL: YOUR SCHOOL SETS THE PRICE

Ambassadors' pricing model differs from our competitors' models. **Our approach is flexible and transparent,** making course materials more affordable for your students without sacrificing fulfillment and reliability.

1. **We provide full transparency – we show you exactly what we earn.**
2. **We put you in the driver's seat – you set the Student Sell Price and choose your commission.**
3. **We don't nickel and dime you – we don't charge implementation, maintenance, or training fees, and we don't charge for our Course Materials Platform, RODA.**

Under Ambassador's bottom-up model, we start with the acquisition cost of the item, include an agreed upon mark-up, and add your desired revenue share to establish the Student Sell Price. **This allows you to achieve the objectives of generating revenue, reducing student costs, or both – a WIN, WIN!**

All transactions are viewed in real time. We provide full transparency, which assists with budgeting and planning. Should you choose to generate revenue share, or any contribution for student services, then your team simply advises us of the targeted amounts, and we adjust the Student Sell Price.

### AMBASSADOR'S BOTTOM-UP MODEL

Ambassador's bottom-up model utilizes the concept of a mark-up on the acquisition cost of the item handled by Ambassador, which provides transparency to the pricing process.


### #1 Acquisition Cost

The acquisition cost of an item is the first step to establish the pricing. If you have negotiated a special discount with any publisher, Ambassador will apply the discount when establishing the acquisition cost. If a special discount has not been secured, Ambassador will apply the standard publisher discount when establishing the acquisition cost. Ambassador will assist in discussions with publishers to negotiate special or deeper discounts, including discounted pricing for Inclusive Access, if desired.

### #2 Ambassador Mark-Up

An agreed upon mark-up will be added to the acquisition cost of each item to establish the fee for Ambassador to provide the services. This locks in our fee, which is our Invoice Price, giving you full transparency for budgeting and revenue projections.

### #3 Student Sell Price With/Without School Revenue Share

With Ambassador, you set your own commission rate. You even have the option of setting different commission rates based on course material category and based on percentage of discount within each category, if you wish. If you don't wish to generate revenue, that's fine as well, the choice is yours.

**If you decide to generate School Revenue Share**, then Ambassador has several pricing models to generate revenue at your discretion.

In cases where the majority of the purchases will be via student pay, with some school vouchers/financial aid, Ambassador's mark-up plus your desired commission/revenue share is added to the acquisition cost to establish the Student Sell Price, which is the amount the student is charged. Under this model the Invoice Price is the same as the Student Sell Price. Ambassador remits to your team each quarter the requested percentage for revenue share.

In cases where the majority of the purchases will be via school pay, such as school vouchers/financial aid, Inclusive Access or Equitable Access programs, or orders placed on behalf of students by your school, Ambassador's mark-up plus your desired commission or revenue share is added to the acquisition cost to establish the Student Sell Price. The amount you are charged is the lower Invoice Price. Under this model, the difference between the Student Sell Price set by your school and the lower Invoice Price is the amount of revenue generated by your school as each transaction is generated.

It's important to note that both revenue share models yield a Student Sell Price **often below Publisher List Price!** This is at the discretion of your School as you elect to set the Student Sell Price at or below Publisher List Price.

**If you decide not to generate School Revenue Share**, then only Ambassador's mark-up is added to the acquisition cost to establish the Student Sell Price, which is the same as the lower Invoice Price.

### II. EXPLAIN HOW YOUR PRICING MODEL ALIGNS WITH THE UNIVERSITY'S MISSION TO MINIMIZE THE FINANCIAL BURDEN OF COURSE MATERIALS ON STUDENTS, HIGHLIGHTING ANY INNOVATIVE APPROACHES TO COST REDUCTION OR PRICING CAPS TO ENSURE AFFORDABILITY.

As shared above, affordability is top of mind with Ambassador. **Unlike any other course materials provider, our pricing model allows your school to drive pricing.** Our student centric approach connects students with their materials, the right way, at the right time, and at the right price, addressing pricing concerns and maximizing affordability.

### TEN WAYS AMBASSADOR SAVES YOU MONEY ON COURSE MATERIALS

1. **You are in control of the sell price and your commission –** not Ambassador!
2. We verify usage and fees so you are not blindly relying on third party invoices **– you know exactly what you owe and don't overpay**.
3. Our No Duplicate/Drop functionality shows if students have purchased an item or have an active license and **prevents students from purchasing the same item again**.
4. We power 250+ Inclusive Access and Equitable Access programs, where we have seen an **average savings of 40-60% off publisher list price.**
5. We provide eBooks, access codes and other **lower priced digital content**.
6. We provide reliable data to support **publisher negotiations and discounts**.
7. We help **faculty assemble OER options** and compare prices and formats.
8. We maximize the number of **quality used books** with our buyback program and leverage marketplace relationships to supplement our used book inventory.
9. We offer **rental titles** and provide **marketplace access** where students can view options from a variety of third-party vendors directly from within the Online Bookstore.
10. We **hold prices steady** through a term so students who purchase late are not penalized.

### III. DESCRIBE IF YOUR PLATFORM SUPPORTS DYNAMIC PRICING AND ALLOWS STUDENTS TO COMPARE COURSE MATERIALS PRICES ACROSS MULTIPLE VENDORS WITHIN A SINGLE INTERFACE, INCLUDING INFORMATION ON THE RANGE OF COMPETITORS' PRICES DISPLAYED. CONFIRM LENGTH OF TIME WITHIN EACH SEMESTER AND TERM THAT DYNAMIC PRICING IS AVAILABLE FOR STUDENT USE.

Students will be able to see pricing for all course materials formats, including marketplace materials so they can make the best purchasing decision. Additionally, Ambassador assists schools in HEOA compliance. Our Bookstore Sell Price Report provides Course Code, ISBN, Title and Student Selling Price in compliance with federal recommendations for all course materials offered through the bookstore. Ambassador provides a Pricing Calculator for students to calculate the cost of their course materials including sales tax and shipping without having to go through the ordering process.

Additionally, as faculty select materials, we provide transparency around costs for required course materials and rank alternative sources and formats so faculty can make informed decisions. Publisher List Price information is shown and we provide **a unique rating system that considers affordability** when recommending adoptions.

Ambassador's Bottom-Up pricing model as described above ensures pricing is competitive, showing you exactly what goes into the price and allowing you to set the Student Sell Price.

### IV. CLARIFY THE SCOPE AND CRITERIA OF YOUR PRICE MATCH POLICY (IF APPLICABLE), DETAILING ANY RESTRICTIONS OR CONDITIONS THAT APPLY, ENSURING TRANSPARENCY IN HOW STUDENTS CAN BENEFIT.

Ambassador will price match nationally recognized third-party online retail sites for new textbook purchases, matching the ISBN and verifying condition and format. To be eligible for price match, the item must be listed on your Online Bookstore, in stock at time of purchase, and with student direct pay. We offer one price match per title per student. Students submit their price match request within seven days through the Contact Us page of your Online Bookstore, and upon validation, the difference is refunded to the student's credit card.

### V. DISCUSS ANY AVAILABLE BUNDLING PACKAGES THAT COMBINE COURSE MATERIALS AT A REDUCED COST, OUTLINING HOW THESE PACKAGES ARE DEVELOPED AND CUSTOMIZED FOR SPECIFIC COURSES OR PROGRAMS.

### AMBASSADOR'S INCLUSIVE ACCESS SOLUTION

Inclusive Access can be a complicated undertaking, but Ambassador makes it easy. We do all the heavy lifting, which relieves the burden on your IT team, and we can help you implement Inclusive and Equitable Access for **specific courses, programs, and schools within your institution – you decide**.

- ✓ **Two+ decades on the forefront of automatic fulfillment programs**
- ✓ **250+ Inclusive and Equitable Access programs under management**

Ambassador remains flexible when it comes to Inclusive Access. **We don't dictate how your programs operate or what models you use** – you do, backed by our decades of experience. If you want to offer an Online Bookstore campus-wide, but Inclusive Access for a few courses programs, **the choice is yours**.

Ambassador's Inclusive Access solution automates the course materials process. Your team simply provides the required information (including student ID, name, address, registered courses and booklist) and Ambassador does the rest. Ambassador can work with your faculty to market and alert them when Inclusive Access programs are available and when the deadlines are to adopt the materials.

**With Ambassador's Inclusive Access solution, students automatically receive digital course materials prior to class start with minimal involvement on their part.**

With our Inclusive Access solution, students automatically receive digital course materials prior to class start with minimal involvement on their part. Digital materials can be accessed through Ambassador's Course Materials Platform, RODA, as well as your LMS or preferred electronic platform on or before the first day of class. Students receive an email confirmation with access instructions. Hard copies can be made available through our Print-on-Demand services.

### PUBLISHER RELATIONSHIPS

Because of our deep publisher relationships and quantities of materials purchased on behalf of your courses under Inclusive Access, we can pass along significant cost savings to your students. We have seen an average savings of anywhere from 40% to 60% off publisher list price.

### REAL-TIME REPORTING

**Ambassador provides full transparency when it comes to Inclusive Access.** We manage all purchase orders, vendor invoices and payments, and provides you with one consolidated invoice. Transactional information is returned to the campus's ERP system via FTP'd data files, excel based daily, weekly, and monthly summaries, and detailed reports. Summaries by campus, program, materials, and course are available as are detailed reports by student and item. Scheduled reports can be delivered via secured zip files attached to emails. Real-time reporting is available via Ambassador's RODA course materials platform.

**Additionally, our No Duplicate/Drop reporting is especially helpful for Inclusive Access programs, preventing students from purchasing the same digital items again.** For example, say a student takes a course freshman fall term and buys the required eBook with a one-year duration. A course the following spring requires the student to purchase the same eBook. Since we are tracking the student's one-year duration, <u>we make sure the student doesn't buy it a second time since the license is still active</u>.

### BILLING AND INVOICING

For reconciliation of Ambassador's invoices, a daily data file feed is available and recommended. The daily feed is loaded into your transaction processing system or data warehouse. For school vouchers, this daily transactional data is used to reconcile the weekly and month-end Ambassador invoices. An optional monthly consolidated report is also available to simplify the reconciliation process. Invoicing can be done at the campus, business group or corporate level with breakdowns by any grouping or billing codes you may require.

### VI. SHARE EXPERIENCES OF PAST COLLABORATIONS WITH ACADEMIC LIBRARIES OR OTHER INSTITUTIONS ON INITIATIVES AIMED AT REDUCING COURSE MATERIALS COSTS, SUCH AS COURSE MATERIALS RESERVE PROGRAMS OR THE ADOPTION OF OPEN EDUCATIONAL RESOURCES (OER) AND/OR LOW-COST MATERIALS, INCLUDING OUTCOMES AND IMPACTS OF THESE EFFORTS. CONFIRM THAT OER AND/OR LOW-COST MATERIALS SHALL BE AVAILABLE FOR ADOPTION AND VISIBLE TO STUDENTS WHEN MATERIALS ARE ADOPTED.

Ambassador is open to working with your library to ensure students have access to the materials they need. When it comes to OER, Ambassador supports the entire OER process for your staff and faculty, navigating logistics, systems, and management. Our expert team can help faculty find relevant and meaningful content and we can make recommendations, or faculty can create their own robust, customized collections of digital and print materials. We also maintain partnerships with OER providers, including OpenStax. We assemble and curate your content from OER, web articles, blogs, images, videos and publisher content, as well as your school's or an instructor's own content. Custom course packs are readily accessible and more affordable as Ambassador custom prints your content or converts it to a digital resource, as well as manages distribution. Ambassador will work with you to explore the best way to incorporate reserve books in the UMW library, including the option of placing a fulfillment order for specifically for the library.

## 4. ORDERING, BUYBACK, SHIPPING, DELIVERY

### A. OUTLINE YOUR COMPREHENSIVE BUYBACK POLICY OR PROGRAM FOR PURCHASING USED BOOKS FROM STUDENTS, DETAILING THE PROCESS, ANY ASSOCIATED COSTS, AND PRICING METHODOLOGY FOR BUYBACK MATERIALS TO ENSURE TRANSPARENCY AND FAIRNESS.

Ambassador believes buybacks are essential as they assist in creating a solid used book inventory, which presents yet another cost-effective way for future students to obtain course materials. Your students may sell back course materials to Ambassador at any time (24x7x365) using Ambassador's Buyback Program. Ambassador accepts student buybacks via the Online Bookstore or, if applicable, at your on-campus store. Ambassador makes a conscious effort to establish fair buyback pricing, and items being readopted in used format for the upcoming semester warrant a higher buyback price.

Utilizing Ambassador's buyback program, students will be:

- Informed upfront as to the dollar amount they can expect for the buyback

- Provided a shipping label for **free shipping** back to Ambassador for items processed through the Online Bookstore
- Able to track the progress of the buyback and refund process
- Receive payment via check once the item has been received and inspected

For students who purchase their materials through Ambassador, the company can offer students a buyback guarantee for certain titles whereby students are notified up front of the minimum price they will receive for the item at the end of the term.

### B. DESCRIBE THE AVAILABLE OFFLINE ORDERING OPTIONS FOR STUDENTS, ENSURING ACCESSIBILITY FOR ALL, REGARDLESS OF THEIR INTERNET ACCESS.

Our Client Services team is available to help students place orders offline. Students can request a call from our team at a time that is convenient for them, and a representative can assist in placing an order if a student does not have the ability to place one online.

### C. EXPLAIN HOW YOUR SERVICE ADAPTS TO MEET THE NEEDS OF BOTH CAMPUS-BASED AND REMOTE STUDENTS, HIGHLIGHTING ANY SPECIFIC STRATEGIES TO ENSURE EQUITABLE ACCESS TO MATERIALS.

Ambassador has extensive experience serving students that do not reside on campus, including remote/international students. We will work with you to ensure all students receive their materials in a timely manner. Students will have the opportunity to review shipping options and charges during the online ordering process. Each of our distribution centers is equipped with major ship carrier World Ship stations (UPS, USPS), which utilize keyed import for automatically completing and verifying addresses. Additionally, shipping labels for PO Boxes, APO and FPO are processed leveraging Ambassador's integrations with these major ship carriers.

### D. DETAIL PROTOCOLS FOR COMMUNICATING WITH STUDENTS, FACULTY, AND STAFF INSTANCES OF ORDER DELAYS, EMPHASIZING TIMELY AND CLEAR COMMUNICATION CHANNELS TO MANAGE EXPECTATIONS EFFECTIVELY.

While rare, backorders are automatically filled once the item is available from the publisher or vendor without any further involvement from the student or school. Students are notified immediately if there will be a delay. Additionally, the traffic manager at each distribution center receives an exception report each day identifying shipments that were not delivered according to schedule. Each package is reviewed to ensure it is not lost, but rather delayed for some other reason. If it is determined lost in transit, Ambassador will immediately replace that package and mark it for expedited delivery.

### E. DESCRIBE THE ON-CAMPUS PICKUP OPTIONS FOR ONLINE ORDERS, PROVIDING CONVENIENCE AND FLEXIBILITY FOR STUDENTS TO RECEIVE THEIR MATERIALS.

For course materials ordered through the Online Bookstore and shipped to the on-campus store, Ambassador's supply chain software, TAG, simplifies the way you receive, manage, distribute and track packages, and how returns are handled for refunds or for reassignments. Ambassador pre-bundles packages by student order and automatically logs them for you. Packages are monitored through timely scanning, student notifications and digital signatures or marked confirmations so that you know exactly what has been delivered, what has been picked up, and what can be returned. The entire process is efficient, increasing accuracy and saving time and money.

### F. PROVIDE A DETAILED ACCOUNT OF YOUR DELIVERY PROCESS FOR ONLINE ORDERS, INCLUDING ANY ASSOCIATED COSTS.

As mentioned, since Ambassador carries a dedicated inventory for you, **most items are shipped together at one time and under a consistent shipping timeline guarantee**. This is an important consideration compared to other vendors that have multiple third-party vendors drop ship, therefore charging students shipping fees and adjusting delivery dates for each individual item.

## ORDER PROCESSING STANDARDS AND METRICS

Our warehousing and shipping philosophy is driven by a commitment to accuracy and timeliness. Whereby some of our competitors outsource to distributors, we do it all. Our proprietary technology, logistics network, and distribution centers personnel make sure orders are picked, packed and shipped error-free and efficiently.

- **99.58% in-stock rate when students purchase materials**
- **90% same-day shipping of in-stock items (remainder next business day)**
- **99.96% order accuracy**

## SHIPPING EFFICIENCIES

Our distribution centers are equipped with Ambassador quality control packing stations, which ensures the proper items go into each shipping carton. Each distribution center is equipped with major ship carrier World Ship stations (UPS, USPS), which utilize keyed import for automatically completing and verifying addresses. Shipping labels for PO Boxes, APO and FPO are processed leveraging Ambassador's integrations with these major ship carriers.

Ambassador has made significant investments in automation and scanning technology to keep accuracy at the highest levels. Built to scale, we can process and ship tens of thousands of orders per day, getting resources into your students' hands when and how they need them.

As student orders are placed online, orders are picked, packed and shipped according to their priority utilizing our Shipment Control System. **Orders placed during business hours before 2:00 PM ET will be shipped the same business day.**

Students can review and track the status of all orders 24/7 by utilizing the "Order History" feature on the Online Bookstore, and they will receive three customized confirmations and notifications:

1. Upon order completion
2. Upon shipment
3. Upon delivery

The traffic manager at each distribution center receives an exception report each day identifying shipments that were not delivered according to schedule. Each package is reviewed to ensure it is not lost, but rather delayed for some other reason. If it is determined lost in transit, Ambassador will immediately replace that package and mark it for expedited delivery.

## SHIPPING POLICIES AND TIMELINES

Because Ambassador manages dedicated inventory for each client, the majority of items are shipped together at one time and under a consistent shipping timeline guarantee. This is an important consideration compared to other vendors that have multiple third-party vendors drop ship, therefore charging students shipping fees and adjusting delivery dates for individual items.

Ambassador provides various ground and expedited ship options from UPS and USPS, including free shipping. The Online Bookstore displays the available shipping options along with estimated delivery days for each method. Determined by your school, students may have the choice to ship their order to a residence or to the campus (i.e., gear shop) for pickup.

Ambassador will provide a year-round **FREE SHIPPING** option via USPS economy for orders over $69. In addition, Ambassador has successfully implemented free bulk shipping options to campus prior to a semester start. Ambassador would be happy to explore this option and similar shipping programs with you. Ambassador's supply chain software, TAG, simplifies the way students, faculty and administrators can manage and track packages, and how returns are handled for refunds.

### SHIP-TO-STORE CAPABILITIES

For course materials ordered through the Online Bookstore and shipped to the on-campus store, Ambassador's supply chain software, TAG, simplifies the way you receive, manage, distribute and track packages, and how returns are handled for refunds or for reassignments. Ambassador pre-bundles packages by student order and automatically logs them for you. Packages are monitored through timely scanning, student notifications and digital signatures or marked confirmations so that you know exactly what has been delivered, what has been picked up, and what can be returned. The entire process is efficient, increasing accuracy and saving time and money.

### G. EXPLAIN YOUR APPROACH TO DELIVERING DIGITAL/ELECTRONIC COURSE MATERIALS, INCLUDING INTEGRATION WITH CANVAS (UMW'S LMS), TO ENHANCE THE LEARNING EXPERIENCE THROUGH SEAMLESS ACCESS TO RESOURCES.

Ambassador can integrate with leading LMS platforms, including Canvas. Ambassador's integrations with LMS and student portal providers give students seamless, Single Sign-On access to the Online Bookstore. Ambassador offers API, LTI and SAML Single Sign-On options, simplifying the entire process.

When it comes to digital materials inventory, we work with publishers to secure items and we manage your digital catalog, licenses, and eReader accounts, including automatic license code redemption, cancellation, and reconciliation. We collect unique identifiers for LMS content links, and we procure access codes and load them into your school-dedicated virtual inventory. Based on your preference, we can email your students with instructions and access codes and/or provide Single Sign-On access. Through integrations with your LMS and SIS, students can easily access all digital content in a simplified, unified experience.

#### I. CONFIRM WHETHER YOU OFFER CANVAS INTEGRATION, STREAMLINING THE PROCESS FOR STUDENTS AND FACULTY TO ACCESS MATERIALS DIRECTLY THROUGH THE LEARNING MANAGEMENT SYSTEM.

Yes, Ambassador integrates with Canvas.

## 5. FACULTY ADOPTION

### A. OUTLINE YOUR PROCEDURE TO GUARANTEE THAT ALL COURSE MATERIALS—WHETHER REQUIRED, RECOMMENDED, OR SUGGESTED—ARE ACCESSIBLE ON TIME AND IN ADEQUATE QUANTITIES. HIGHLIGHT HOW YOUR SYSTEM TRACKS AND MANAGES INVENTORY TO MEET THE COURSE NEEDS EACH SEMESTER.

Ambassador provides faculty with a broad range of support options throughout the adoption lifecycle to ensure that they can easily find, evaluate and adopt the best and most relevant course materials. In-depth and ongoing training is provided to faculty to ensure their understanding of the tools and processes. Your Client Services Team will help manage your booklist through the method that best meets the needs of your campus:

- BookAT: intuitive online adoption and workflow tool
- BookIT: simple, yet manual version-controlled spreadsheet

### Adoption Process

Ambassador helps make sure adoptions are completed in a timely manner and ready for distribution:

1. **Submit:** Faculty submit adoptions via BookAT or BookIT.

2. **Vet:** Ambassador thoroughly reviews your booklist to verify sources and availability, working with publishers and suppliers on your behalf.
3. **Notify:** Ambassador lets faculty know about edition changes, price changes, and shortages/limited quantity items.
4. **Update:** Faculty provide Ambassador any necessary updates or changes.
5. **Procure:** Ambassador secures materials for distribution, taking ownership of your inventory. Physical materials are ordered, stored and shipped from our warehouse while digital materials are loaded into the school's digital content collection.

During our adoption process, Ambassador will request a sales history report to get an accurate assessment of past adoptions per course and per ISBN, and assess necessary quantities based on your enrollment projections. Upon cleansing and vetting the adoption list, Ambassador will stock sufficient inventory. Going forward, Ambassador has various automated reports which provide your assigned Client Services Team with sales history, so they are able to accurately determine the quantity of items to secure each distribution period.

## B. DETAIL THE RESOURCES AND SUPPORT SYSTEMS IN PLACE TO ASSIST FACULTY AND STAFF IN THE ADOPTION PROCESS. DESCRIBE HOW THESE TOOLS FACILITATE INFORMED DECISIONS AND STREAMLINE THE SELECTION OF COURSE MATERIALS.

Ambassador provides a best-in-class instructor experience with our online adoption tool, BookAT. We provide access to a comprehensive listing of millions of titles which are updated regularly so faculty are always in the know when it comes to availability, including outdated editions, out-of-print titles, OER materials, backorders, and substitutes. We provide faculty with detailed information, including price comparisons, so they can adopt the most relevant titles and/or the most appropriate substitutes. BookAT is easy for faculty to use, plus Department Heads can approve materials and view faculty who have not submitted adoptions within the optimal timeframe.

### PERSONALIZED INSTRUCTOR EXPERIENCE

Ambassador emails a custom link directly to the instructor with no login or password required. We upload your instructor course assignments prior to the start of the collection period, pre-populating data from your SIS. This makes re-adoption of past titles seamless.

### PROACTIVE COMMUNICATIONS

Adoption timelines and criteria emails can be sent to encourage timely submissions. Automated reminder emails can be set up for instructors and departments with outstanding adoptions or pending approvals.

### WORKFLOW MONITORING

Ambassador enables your booklist administrator(s) to monitor the adoption process at a high-level, compare previous terms and term averages, and connect with instructors who have not yet submitted. Regular reports help you monitor and avoid late adoptions requests.

## C. CLARIFY WHETHER FACULTY HAVE THE CAPABILITY TO COMPARE PRICES FOR COURSE MATERIALS AND OTHER MATERIALS ACROSS VARIOUS PUBLISHERS AND ISBNS THROUGH YOUR SERVICE. IF SO, PROVIDE AN EXPLANATION OF HOW THIS FEATURE IS IMPLEMENTED AND ACCESSED.

As faculty select materials, we provide transparency around costs for required course materials and rank alternative sources and formats so faculty can make informed decisions. Publisher List Price information is shown and we provide **a unique rating system that considers affordability** when recommending adoptions.

## D. DESCRIBE THE ANALYTICAL TOOLS AND REPORTING FEATURES AVAILABLE THROUGH YOUR ONLINE SYSTEM. INCLUDE HOW THESE CAPABILITIES CAN ASSIST IN ADOPTION DECISIONS, TRACK MATERIAL USAGE, AND ANALYZE SPENDING TRENDS OVER TIME.

At Ambassador, **our level of transparency is a clear differentiator**. We rely on data to track, measure, and improve programs, and our proprietary analytics technology provides you with easy access to relevant insights all through one platform, RODA. Our approach allows you to operate efficiently, plan strategically, and improve student retention rates and learning outcomes.

**We aggregate all the data, information, and interactions that your school has with publishers, courseware providers, platforms, and systems, and we connect the dots**. For example, our real-time reporting and actionable analytics can help you:

- **Gauge savings from financial controls**
- **Leverage data in publisher negotiations**
- **Develop intervention strategies to improve outcomes and retention**

Because RODA integrates with your SIS, LMS, Financial Systems, eBook Readers, and publisher platforms, data easier to manage and you gain greater visibility into course materials transactions, trends, usage, and metrics. Our analytics and reporting solutions increase data accuracy and reduce data redundancy.

RODA provides authorized staff real-time access to every phase of operations, including insights into ordering history, inventory levels, and sales forecasting, as well as performance reports on the number of materials sold. RODA generates standard and custom reports, and dedicated support is available to help you navigate an array of dashboards, automated and downloadable reports, on-demand reporting, and notifications. Reports are delivered automatically, at scheduled intervals, or on-demand. Our reporting suite automatically can send any report required to support your course materials operations to your email inbox or FTP site.

| Sales Reports | Financial Reports | Inventory Reports | Booklist Reports | Affordability Reports |
|---|---|---|---|---|
| ✓ Sales by Pub/ Supplier or Item<br>✓ Backorders<br>✓ Shipping Methods<br>✓ Manual Orders<br>✓ Reorders<br>✓ Order Trends | ✓ Weekly Transactions Invoiced<br>✓ Weekly Sales Tax<br>✓ Monthly Consolidated Sales Tax | ✓ Inventory Needs Forecasting<br>✓ Inventory Not Selling<br>✓ Inventory Last Sold | ✓ Master Booklist<br>✓ Course Activity<br>✓ Booklist w/ Student Sell Price | ✓ Campus Wide Affordability<br>✓ Adopted Titles<br>✓ Dept. Filters<br>✓ Term Level Affordability Average<br>✓ Invoice by Campus |

### NO-DUPLICATE/DROP REPORT

Ambassador's No-Duplicate functionality prevents students from obtaining the same item more than once. We have controls in place to track which students request materials and if they already have those items, including access from a prior course. The No-Duplicate/Drop report monitors gross items requested, backs out duplicates, and credits items for dropped students, showing the school how many net items were accurately provisioned and how much money they saved as a result.

| Site Name | Semester Name | Gross Items Requested | Items Not Provisioned Leveraging Duplicate Functionality | Items Credited/Not Provisioned Leveraging Drop Functionality | Net Items Provisioned | Student Sell Price of Net Items Provisioned | Student Sell Price Savings ($) | Student Sell Price Savings (%) |
|---|---|---|---|---|---|---|---|---|
| School A | Winter Term | 1,500 | 87 | 79 | 1,334 | $117,119.28 | $13,237.66 | 10.74% |
| School B | Winter Term | 17,315 | 3,056 | 2,285 | 11,974 | $797,324.79 | $364,881.76 | 38.4% |
| School C | Winter Term | 42,319 | 4,203 | 5,906 | 32,210 | $1,541,639.83 | $507,204.39 | 27.58% |

## CONSOLIDATED SEMESTER REPORT

Ambassador's Consolidated Semester Report is a comprehensive snapshot of all course materials metrics over the term, including term open and close, number of courses, number of SKU's, number of distinct titles, number of distinct student orders, sales, returns, credit card purchases, voucher purchases, items shipped by each method, and more. Schools can compare terms, identify trends, and assess indicators and turning points in pricing, purchases, and revenue.

| | Winter (2023) | Winter (2024) |
|---|---|---|
| Semester Info | | |
| Semester Start Date | 1/2/2023 | 1/8/2024 |
| Bookstore Open Date | 12/5/2022 | 12/11/2023 |
| Bookstore Close Date | 2/10/2023 | 2/16/2024 |
| Booklist Information | | |
| Total # Courses | 615 | 657 |
| Total # ISBNs/SKUs | 557 | 448 |
| Total # Distinct Titles | 276 | 277 |
| Student Enrollment and Sellthrough | | |
| Total Distinct Student Enrollments | 4,249 | 4,880 |
| Total Distinct Students Ordered | 1,074 | 1,250 |
| Total Orders Placed | 1,221 | 1,403 |
| Summary Sales | | |
| Total Sales | $225,059.57 | $227,694.6 |
| Total Returns | ($10,201.72) | ($15,102.22) |
| Net Voucher Sales | $154,770.09 | $150,845.16 |
| Net CC Sales | $60,087.76 | $61,747.31 |
| OB Duplicate Savings | $19,689.9 | $11,873.07 |

| | Winter (2023) | Winter (2024) |
|---|---|---|
| Item Categories Sold | | |
| Electronic Book | 348 | 353 |
| Textbook | 1,473 | 1,485 |
| KITS | 29 | 10 |
| MISC | 323 | 310 |
| Access Code | 54 | 78 |
| Publisher Direct Redemption | 125 | 174 |
| Textbook Rentals | 22 | 10 |
| Shipping Details | | |
| Ground | 926 | 225 |
| Ground Advantage | 0 | 131 |
| Media | 13 | 669 |
| Next Day Air Saver | 38 | 26 |
| Second Day Air | 77 | 48 |
| USPS | 30 | 36 |

## RETENTION REPORT

Ambassador's Retention Report tracks students who have placed orders for course materials and those who have not placed orders, giving schools actionable insights to be as proactive as they want, from sending simple reminders to reaching out to see if there are signs that might impact completion and retention. The report also allows schools to analyze purchasing data and determine whether outcomes and success factors correlate with those students who purchase required course materials.

### I. CONFIRM WHETHER OR NOT OER AND/OR LOW-COST MATERIALS ARE AVAILABLE FOR ADOPTION. IF SO, DESCRIBE THE ADOPTION PROCESS.

Ambassador supports the entire Open Education Resources (OER) process for your staff and faculty, navigating logistics, systems, and management. Our expert team can help faculty find relevant and meaningful content and we can make recommendations, or faculty can create their own robust, customized collections of digital and print materials. We also maintain partnerships with OER providers, including OpenStax. We assemble and curate your content from OER, web articles, blogs, images, videos and publisher content, as well as your school's or an instructor's own content. Custom course packs are readily accessible and more affordable as Ambassador custom prints your content or converts it to a digital resource, as well as manages distribution.

**II. CONFIRM WHETHER UMW STAFF WOULD HAVE ACCESS TO THE ADOPTION PORTAL AND THE ABILITY TO RUN REPORTS INCLUDING BUT NOT LIMITED TO ADOPTION LISTS BY SEMESTER AND TERM. CONFIRM WHETHER OR NOT AVAILABLE REPORTS ARE IN REAL TIME, MAKING THE MOST CURRENT INFORMATION AVAILABLE TO UMW STAFF WITH ACCESS, AND WHETHER OR NOT HISTORICAL INFORMATION IS ALSO AVAILABLE.**

Yes, your staff will have real-time access to run and analyze inventory and booklist reports, including current and previous terms.

## 6. ACADEMIC, SCHOLARLY, AND TRADE BOOKS

**A. OUTLINE THE METHODOLOGIES YOU EMPLOY TO MARKET AND PROMOTE PUBLICATIONS AUTHORED BY THE UNIVERSITY'S FACULTY, ALUMNI, AND COMMUNITY AUTHORS. HIGHLIGHT HOW YOU PLAN TO LEVERAGE THESE CONNECTIONS TO ENHANCE VISIBILITY AND ENGAGEMENT WITHIN AND BEYOND THE UNIVERSITY COMMUNITY.**

Ambassador's Content Lab readily integrates content from a wide variety of sources, including a diverse library of publishers, web articles, blogs, Open Educational Resources (OER), as well as Word, PowerPoint and PDF files. This can also include a faculty member's own content, as well as publications by alumni and local authors. Our Client Services team will work with you to ensure the content and publications you want are available, accessible and adopted.

Additionally, UGS will provide products that serve the mission and values of your school, including trade books written by faculty authors. UGS welcomes the opportunity to host book signings at your store and will collaborate with you to advertise the events.

**B. DETAIL THE CRITERIA AND PROCESS FOR SELECTING TRADE BOOKS THAT RESONATE WITH THE INTERESTS AND NEEDS OF THE UMW COMMUNITY. DESCRIBE HOW YOU ENSURE A DIVERSE AND RELEVANT SELECTION THAT APPEALS TO THE ACADEMIC AND CULTURAL FABRIC OF THE UNIVERSITY.**

Ambassador works directly with more than one thousand content and technology partners, wholesalers and educational publishers and we can source any trade books and other resources as necessary as part of your booklist. We provide access to a comprehensive listing of millions of titles which are updated regularly so faculty are always in the know when it comes to availability and pricing. Additionally, our support team can help with title recommendations, alternatives and substitutes.

**C. HOW WOULD YOU DEFINE SPECIAL ORDERS AND HOW WOULD YOU ACCOMMODATE THESE REQUESTS?**

Ambassador will work with you to source any special book and other requests. We handle desk copies and sampling of eBooks for faculty, and can place special orders to fulfill additional student and faculty requirements.

**D. DESCRIBE ANY OTHER ACADEMIC, SCHOLARLY, AND TRADE BOOK SERVICES YOU OFFER.**

As mentioned, Ambassador can source any trade books and other resources as necessary as part of your booklist.

# I. TECHNOLOGY:

**1. TECHNOLOGY STANDARDS: THE SUCCESSFUL BIDDER ACKNOWLEDGES AND AGREES TO THE FOLLOWING STANDARDS REGARDING ALL SOFTWARE OR TECHNOLOGY SOLUTIONS THAT INTERACT WITH UMW DATA:**

**A. CIO REVIEW & APPROVAL: ANY SOFTWARE OR TECHNOLOGY SOLUTION THAT USES, STORES, OR INTERACTS WITH UMW DATA MUST UNDERGO AND PASS A REVIEW BY UMW'S CIO BEFORE IMPLEMENTATION. THE BIDDER SHALL SUBMIT ALL NECESSARY DOCUMENTATION, INCLUDING IMPACT ASSESSMENTS AND DATA CLASSIFICATION DETAILS, FOR THE CIO'S EVALUATION.**

Ambassador and UGS will work with your CIO to provide requested documentation.

**B. COMPLIANCE: NO TECHNOLOGY SOLUTION SHALL BE DEPLOYED WITHOUT EXPLICIT WRITTEN APPROVAL FROM UMW'S CIO, ENSURING ADHERENCE TO UMW'S SECURITY, ACCESSIBILITY, AND OPERATIONAL STANDARDS.**

Ambassador and UGS will work with your CIO to ensure adherence to UMW's security, accessibility and operational standards.

**C. DOCUMENTATION:**

**I. A CURRENT VPAT (VOLUNTARY PRODUCT ACCESSIBILITY TEMPLATE) SHOULD BE INCLUDED WITH THE RFP RESPONSE TO VERIFY COMPLIANCE WITH ACCESSIBILITY STANDARDS.**

Ambassador's VPAT is attached separately.

**II. THE VENDOR'S OWN SOC 2 TYPE II REPORT BY AN INDEPENDENT THIRD-PARTY AUDITOR TO ENSURE SERVICE PROVIDERS SECURELY PROTECT THE DATA AND INTERESTS OF THE INSTITUTION, NOT THE HOSTING PROVIDER, SUCH AS AWS OR AZURE, ETC.**

Ambassador maintains a routinely audited SSAE 18 SOC I Type II compliance for data security. Our primary technology infrastructure is located at a professional SSAE18 compliant co-location datacenter, featuring state-of-the-art redundancy, such as Cisco multilevel architecture with redundant fiber optic connections from multiple Tier 1 carriers, on-site multiple-day fuel supply, and seamless cutover generators. The primary technology infrastructure maintains a SOC I Type II and a SOC II Type II.

All data is maintained on a private network restricted through multiple layers of physical and logical access and is encrypted in transit and at rest. The network infrastructure employs a high available design making use of redundant firewalls, switches, and load balancers. In addition, mission critical servers are clustered and replicated for hot failover or standby. All logs and configurations are monitored and audited. Additionally, system reviews, code reviews and vulnerability scans are performed periodically. Access to various aspects of the network is restricted to authorized personnel.

Additionally, Ambassador is PCI compliant. We accept online ecommerce transactions processed through our payment processor's gateway service under the Ambassador Merchant Account. Ambassador does not store or capture credit card information. All credit card transactions are handled via a direct link to our processor's data collection payment portal. Transaction reference numbers are stored in case a credit must be made for returned items. That transaction reference number is meaningful only to the credit card processor who likewise handles all credit transactions for returned items.

## 2. INNOVATION

### A. DETAIL YOUR DEDICATION TO THE CONTINUOUS INVESTMENT IN NEW TECHNOLOGIES AND THE DEVELOPMENT OF INNOVATIVE PRODUCTS AND SERVICES. EXPLAIN HOW YOU PROACTIVELY ANTICIPATE AND ADAPT TO MARKET CHANGES TO MEET THE EVOLVING NEEDS OF THE ACADEMIC COMMUNITY.

### AMBASSADOR INNOVATION

At Ambassador, we have an intimate understanding of the market and are always brining new ideas and new solutions to the table. We understand the changing dynamics of students, and we have the solutions to ensure course materials are easy to access and positively impact their learning experience. We understand the widespread fragmentation of content, and we have the solutions to bring it all together in a simple and intuitive way. We understand pressures IT face in managing multiple systems and platforms, and we streamline course materials management and integrations in a way no other company can. Team Ambassador has a proven track record preparing schools for today and keeping them ready for tomorrow.

Ambassador manages and maintains all integrations. Our dedicated, 100% in-house IT Department has the experience and expertise to **custom design any integration at no additional cost**. Should your school transition to or adopt another platform or need to integrate into any additional 3rd party enterprise financial or student retention solutions, Ambassador will undertake any required integration.

### MEET AMBASSADOR'S COURSE MATERIALS PLATFORM, RODA

Our team at Ambassador set out to create a single platform that would ease accessibility, affordability and transparency, and the result is our revolutionary Course Materials Platform, RODA. **RODA is included for your school at no additional fee.** At the core of all our service models, RODA ensures students get their materials the right way, at the right time and at the right cost.

Unlike any other technology on the market, RODA aggregates all content and applications, and layers it with the necessary integrations, support services, analytics, financial controls and compliance – all through one easy-to-use platform. RODA simplifies the entire course materials adoption, management, delivery, and access processes. This takes a tremendous burden off a school's administrative and IT teams.

**RODA is the recipient of the Campus Technology 2020 New Product Award in the Content Management System Category, recognizing the capabilities and contributions of the platform on a national ed tech stage.**

RODA is the recipient of the Campus Technology 2020 New Product Award in the Content Management System Category, recognizing the capabilities and contributions of the platform on a national ed tech stage.

Ambassador's experienced IT team is 100% in-house, and provides full IT support for your course materials program at no additional charge. We don't outsource any of our IT or development functions. Our IT team handles everything from system integration management and maintenance to system and data center security measures. They oversee all special integration requests, and to date, there has not been a custom integration they could not handle.

### RODA TRANSFORMS THE WAY WE LEARN, WORK, AND COLLABORATE

## INTEGRATIONS

Content management and maintenance add significant pressure to a school's IT infrastructure. RODA manages all integrations with your systems and publisher/content platforms. You don't have to integrate with each system and platform individually, and Ambassador maintains each integration. This provides an easy and efficient way to bridge the gap between your systems and the capabilities of your LMS, publisher platforms and other systems.

## ACCESSIBILITY

RODA expands access with SSO options, navigation support, screen reader compatibility, content controls, study aids and clear accessibility designations. Ambassador configures access for digital content offerings, including non-expiring, semester-based or census-based. We also manage duplicate access, expiration dates, returns, credits and opt-outs.

## TRANSACTIONS

RODA tracks all terms, courses and enrollments and aligns detailed analytics with durations, transactions, duplicates, opt-outs, returns and trends. RODA also eases voucher management, allowing schools to set spending limits, as well as update limits and control expiration dates as appropriate. RODA provides 360-degree transparency into all transactions so you know exactly what you owe the publishers. Real-time reporting and forecasting provide critical insights, and transactions are posted to the student ledger.

## THROUGH RODA, AMBASSADOR MANAGES AND MAINTAINS ALL INTEGRATIONS

Ambassador's state-of-the-art technology, RODA, will support your entire course materials operation, including integration with your systems. Accommodating your needs means that our technology and systems meet your requirements. We handle all publisher and platform integrations through a single, centralized platform, and we handle multiple platforms simultaneously within each institution. Our integrations approach takes tremendous burden off your IT team.

RODA integrates with your existing software and applications to allow for efficient two-way communications, accurate data sharing and expedited processes. Because RODA integrates with leading SIS, LMS, financial systems, eBook readers, publishers and digital content platforms, data is easier to access and manage, and you gain greater visibility into course materials trends, usage, and metrics.

## SIS INTEGRATIONS

RODA interacts with your SIS to integrate student registration information and bookstore transactions. Student course registration information is loaded into the Online Bookstore and when students log on for the first time, their class list, the required course materials, and purchasing options are automatically and clearly displayed. The integration updates automatically to incorporate any changes to the required materials and accommodates for student add/drops, which significantly reduces the burden on your administrative staff. Ambassador can integrate with your systems utilizing an API infrastructure or a file-based data transfer, and frequently customizes these integrations for each client based on their specific needs.

> *"Improving operational processes for colleges and universities is a key priority for us, and the seamless transfer of information between our system and Ambassador's does just that. We share a vision for helping Schools not only do things more efficiently, but more effectively too"*
>
> anthology

## STUDENT PORTAL AND LEARNING MANAGEMENT SYSTEMS INTEGRATIONS

Ambassador's integrations with LMS and student portal providers give students seamless, Single Sign-On access to the Online Bookstore. Ambassador offers API, LTI and SAML Single Sign-On options, simplifying the entire process for students and schools.

## PUBLISHER AND DIGITAL CONTENT PLATFORMS INTEGRATIONS

We maintain strong relationships with all publishers, providing access to both print and digital course materials. RODA integrates with eBook Readers and publisher platforms to automate license key authentication and to enable Single Sign-On from the LMS and student portal. Integrations help fill the data gaps that can exist between you and your publisher partners, providing transparency into trends, usage, and transactions so you don't overpay for course materials.

## FINANCIAL AID INTEGRATIONS

Ambassador will create any necessary integrations between our client portal and your ERP Financial Aid System and other voucher systems to enable students to leverage available funds. The integration ensures real-time posting of student transactions to provide the most up-to-date student balance information. Students will see their current voucher balances available for course materials purchases in the top right corner throughout the ordering process. If the student uses voucher amounts to purchase the order, updated balances are then posted back to your SIS. In cases where a student's purchase exceeds his or her approved voucher spending cap limit set by you, then Ambassador's unique single transaction processing feature allows the student to complete the purchase with a credit card. Utilizing Ambassador's "No Duplicate" feature, students are prevented from making duplicate purchases for the same item, with you having the ability to override the no duplicate control. With Ambassador's vouchering system, schools can restrict which items may or may not be paid by voucher. Voucher reconciliation between Ambassador and your school can be done on a daily, weekly, or monthly basis.

## UGS INNOVATION

UGS recognizes the importance of remaining at the forefront of technological advancements and innovative solutions to provide exceptional products and services to the academic community. Our dedication to continuous investment in new technologies and the development of innovative offerings ensures that we not only meet the current needs of the University of Mary Washington (UMW) but also proactively adapt to future demands. By embracing change and anticipating market shifts, UGS aims to create an experience that supports the evolving needs of students, faculty, staff, and the wider UMW community

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## CONTINUOUS INVESTMENT IN NEW TECHNOLOGIES

UGS is committed to integrating cutting-edge technologies to streamline operations, enhance customer experience, and provide greater value to the UMW community. We invest in innovative tools and systems that enable us to stay ahead of industry trends, ensuring that our services are aligned with the latest developments in retail, customer service, and academic support.

**Technological Advancements in Operations**

- **Point-of-Sale (POS) Systems**: UGS will continuously upgrade its POS systems to ensure faster, more secure transactions and to enable detailed data analytics for inventory and sales management. We will implement modern cloud-based systems that allow for real-time data access and reporting.
- **Mobile Shopping and E-Commerce Integration**: UGS is committed to offering seamless shopping experience for the UMW community through mobile app integration and e-commerce platforms. We will ensure that UMW students, faculty, and staff can easily shop online for merchandise, textbooks, and supplies, with options for delivery, pick-up, and convenient payment systems.

- **Inventory Management Solutions**: We will continue investing in advanced inventory management software that leverages predictive analytics to help forecast demand and optimize stock levels. This technology will minimize stockouts and overstocking, ensuring that the campus store remains well-stocked with the right products.

**Customer Engagement and Support Technologies**

- **Customer Relationship Management (CRM) Systems**: UGS will use CRM tools to personalize communication and improve customer service. This allows us to send targeted offers, promotions, and personalized updates based on customers' preferences and past shopping behavior.
- **Contactless Payment Options**: To make the shopping process more efficient and hygienic, UGS will continue to invest in contactless payment technologies, providing a faster and more convenient option for customers.

## DEVELOPMENT OF INNOVATIVE PRODUCTS AND SERVICES

UGS is dedicated to offering a diverse range of products and services that meet the dynamic needs of the academic community at UMW. By continuously evaluating market trends, customer feedback, and emerging technologies, UGS ensures that it provides products that are both relevant and valuable to the students, faculty, and staff.

**Innovative Product Offerings**

- **Sustainable and Eco-Friendly Products**: As sustainability becomes increasingly important to students and faculty, UGS is committed to offering more environmentally conscious product lines. This includes sustainable textbooks, eco-friendly apparel, reusable stationery, and other green products that align with UMW's sustainability goals.
- **Customizable Merchandise**: UGS will invest in customization technology, allowing students and faculty to personalize merchandise such as apparel, water bottles, and stationery. This will cater to the growing demand for unique, individual expressions of school pride.
- **Technology and Gadgets**: UGS will expand its offering of tech gadgets, devices, and accessories, including tablets, laptops, chargers, and headphones that cater to the needs of students in academic settings. This offer will be continually updated to reflect advancements in technology.
- **Academic Supplies and Learning Tools**: UGS will expand its selection of academic supplies, including study aids, online learning resources, and educational tools that meet the needs of students and faculty across disciplines. We will offer the latest study tools such as digital learning apps, online subscriptions, and academic software, helping to enhance the learning experience.

**Innovative Services**

- **Mobile Ordering and Pickup**: As mobile technology continues to evolve, UGS plans to enhance its services by allowing customers to place orders for textbooks, merchandise, and academic supplies through a mobile app. This will allow for easy pick-up at a designated campus location or direct delivery to students' dorms.
- **Pop-Up Retail and On-Demand Merchandise**: UGS plans to explore pop-up retail experiences across UMW's campus, offering merchandise and academic supplies tailored to specific events, academic departments, and athletic functions. These on-demand retail experiences will bring the products closer to where students need them.

## PROACTIVE ANTICIPATION AND ADAPTATION TO MARKET CHANGES

UGS's ability to stay ahead of market trends and anticipate shifts in consumer demand is a key aspect of our strategy to meet the evolving needs of the academic community. By staying informed and adaptable, we can proactively adjust our services, product offerings, and operations to align with changes in student behavior, technological advancements, and broader market dynamics.

**Staying Informed About Market Trends**

- **Data-Driven Insights**: UGS leverages data analytics to track purchasing behavior, identify product trends, and forecast demand. We utilize both in-store and online data to make informed decisions about what products to stock and how to optimize our services.
- **Industry Research and Networking**: UGS stays engaged with industry associations, retail conferences, and academic partners to stay informed about emerging trends in the higher education retail space, technology advancements, and changing student preferences.
- **Regular Stakeholder Engagement**: Through surveys, focus groups, and direct interactions with UMW faculty, staff, and students, UGS gathers valuable insights into their evolving needs. This feedback will be used to shape product and service offerings, ensuring that we are always meeting the expectations of the UMW community.

**Adaptation to Changing Needs**

- **Flexibility in Product Assortment**: UGS will maintain a flexible product assortment that can be adjusted to meet seasonal demands, new academic trends, or emerging student interests. For example, as new technologies become prevalent in classrooms, we will ensure that the necessary tools and devices are available for students.
- **Expanding Service Offerings**: As remote learning, hybrid models, and digital tools continue to transform academia, UGS will adapt by offering new services such as digital study materials, online academic resources, and virtual workshops.
- **Sustainability and Social Responsibility**: UGS will stay proactive in offering products and services that align with evolving student and university values, including sustainability, diversity, and inclusion. We will adjust our offerings to reflect social trends and student activism, incorporating more ethical products and community-based services.

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UGS's dedication to the continuous investment in new technologies and the development of innovative products and services ensures that we are always adapting to the changing landscape of higher education and retail. By proactively anticipating market shifts and aligning our offerings with the evolving needs of the University of Mary Washington community, we aim to foster an exceptional campus retail experience that supports students, faculty, and staff in their academic and personal lives. Through technology, product innovation, and a forward-thinking mindset, UGS strives to remain a trusted partner for UMW's retail and academic needs.

## 3. WEBSITE/ONLINE PRESENCE

### A. DESCRIBE THE FUNCTIONALITIES AND USER EXPERIENCE OFFERED BY THE UMW CAMPUS STORE'S WEBSITE. SPECIFY THE FOLLOWING CAPABILITIES:

#### I. CUSTOMIZATION: THE ABILITY TO EMBED TAILORED MESSAGES AND CREATE PERSONALIZED WEB PAGES FOR SPORTS TEAMS (ATHLETICS), STUDENT ORGANIZATIONS, AND OTHER CAMPUS GROUPS AND TRACK SALES SPECIFIC TO EACH PERSONALIZED WEBSITE.

Excellent customer service extends beyond the on-campus gear shop. From the first day the University of Mary Washington Gear Shop website launches, our team will be there to assist.

- We are responsive. Our contact information is easy to find at the top of the website. Send us an email and we'll typically answer the same business day or give us a call. We're always happy to talk with our customers.
- The University of Mary Washington Gear Shop website will be easy to navigate and facilitate the need online shoppers have for self-service and speed.


## ORDER PROCESSING TIME

We understand the importance of timely order processing of online orders. Products will be selected, packaged, labeled, and sent within 24 hours of receipt Sunday to Thursday. Orders received Friday and Saturday will be shipped no later than the following Monday.
Protection of Consumer Data

We take information security seriously. Each of our associates is trained in Information Security measures and prevention. Our point-of-sale system protects customer data through its hardware and software configurations. The POS encrypts payment data as soon as the customer swipes, dips, taps, or manually enters the numbers during the sale. Payment encryption makes it harder for anyone to intercept data as it is being processed.

A customer's credit or debit card number, magnetic strip data, and security codes are never stored on our point-of-sale device and are not visible to any of our employees or customers. Therefore, the University of Mary Washington Gear Shop will be completely PCI compliant.
All the University Gear Shop systems are cloud based and transactional data is on its own network connection and secured behind a firewall.

## MARKET SHARE

University Gear Shop protects market share through innovation, focused merchandising, strengthening customer relationships, and smart hiring practices. Our technology allows us to quickly produce new websites and web pages to take advantage of special sales opportunities. Our strong supplier relations mean that we have availability to stock, printing methods, and quick turn-times that our competitors do not.

As a result of strengthening customer relationships, we will protect our existing market share by keeping our current customers engaged and reaching out to prospective customers. We connect with our customers through Facebook, Instagram, targeted email campaigns, sponsorships, campus outreach, text messaging, athletic and student group involvement, and print marketing. UGS will also work with the University of Mary Washington to provide content for your newsletters, emails and other marketing materials including catalogs specifically targeted to the students, faculty, staff, alumni, prospective students and their family members, and the greater Fredericksburg community.

We hire and train highly qualified employees, and reduce expenses related to turnover, thereby devoting more resources to building core competencies.

## II. INVENTORY MANAGEMENT: REAL-TIME ADVISEMENT ON STOCK AVAILABILITY TO KEEP USERS INFORMED.

UGS understands the importance of keeping customers informed about product availability, especially for high-demand items such as campus apparel, and academic supplies. To provide a seamless shopping experience for the University of Mary Washington (UMW) community, UGS employs a range of strategies and technologies to notify customers in real time about stock availability. The goal is to ensure that students, faculty, and staff are always informed and can make well-timed decisions about their purchases.

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### REAL-TIME INVENTORY MANAGEMENT SYSTEMS

UGS utilizes an advanced inventory management system that provides up-to-date information about stock levels in the campus store. This system integrates seamlessly with UGS's point-of-sale (POS) platform and online store, ensuring that stock availability is reflected in real time across all sales channels.

- In-Store Availability: Customers can view the availability of products directly on in-store kiosks or through staff-assisted systems that allow them to quickly check if an item is in stock or backordered.
- Online Store Integration: When shopping online, customers can see the real-time availability of products. If an item is out of stock, it will be marked as unavailable, or customers will be given an option to backorder or receive an alert when it is back in stock.

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### ONLINE PRODUCT AVAILABILITY UPDATES

UGS's website is equipped with real-time advisement features for online shopping. This includes:

- Live Stock Updates: As customers browse products on the website, stock levels are displayed next to the item's description, letting them know if the product is available for immediate purchase or if it is currently out of stock.
- Pre-Order and Back-Order Options: If an item is out of stock, the website will notify customers of an expected restock date, allowing them to pre-order the item or be added to a waitlist for automatic notification when it becomes available.
- Low Stock Indicators: For high-demand items, such as graduation regalia or textbook bundles, UGS can display low stock indicators to create a sense of urgency, encouraging customers to act quickly before supplies run out.

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### STAFF COMMUNICATION AND IN-PERSON ASSISTANCE

In the physical store, UGS staff are trained to provide real-time advisement on stock availability.

- Staff Training: Associates have access to the live inventory management system and can quickly inform customers about stock levels, special orders, or expected restock dates.
- In-Store Customer Alerts: If a customer is searching for an item that is out of stock, staff will provide an estimated timeline for restocking, offer alternatives, or help place an order for future delivery.

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UGS prioritizes keeping the University of Mary Washington community informed about stock availability through a multi-faceted approach that combines real-time inventory management and responsive customer service. By offering proactive updates through various channels, we ensure that customers always have the latest information, which helps them make informed purchasing decisions, reduces frustration, and improves their overall shopping experience.

## III. ORDER PROCESSING: DISPLAY OF ESTIMATED DELIVERY TIMES, COMPREHENSIVE CUSTOMER SUPPORT DETAILS, AND PROMPT ORDER ACKNOWLEDGMENTS.

UGS is committed to providing a seamless and transparent order processing experience for the University of Mary Washington (UMW) community, ensuring that customers are fully informed from the moment they place their order to the point of delivery. Below, we detail the processes we use to display estimated delivery times, provide comprehensive customer support, and offer prompt order acknowledgments.

## DISPLAY OF ESTIMATED DELIVERY TIMES

UGS offers clear and accurately estimated delivery times for both in-store and online orders. We understand that timely delivery is crucial for students, faculty, and staff, and we work hard to ensure transparency in our order fulfillment process.

**Order Confirmation and Estimated Delivery**

- **Online Order Confirmation**: As soon as a customer places an order, they receive a confirmation email or text message detailing their order, including the estimated delivery time. This estimated time will account for the order's shipping method (standard, expedited, etc.), the current availability of the product, and any processing times.
- **Shipping Options**: Customers are given various shipping options at checkout, with associated delivery times for each. The options range from standard ground shipping to expedited shipping for faster delivery. The delivery times are dynamically updated based on the customer's delivery address and the product's availability.
- **Real-Time Tracking**: Once an order has shipped, UGS provides customers with real-time tracking information, so they can track the progress of their order and receive updates on expected delivery times. Customers can view tracking details via the website, mobile app, or directly through the carrier's platform.

**In-Store Pick-Up**

- **Pickup Time Estimates**: For customers opting to pick up their orders in-store, UGS provides an estimated pickup time during checkout. The estimated time considers order processing, and the availability of the items ordered.
- **Ready for Pickup Notifications**: Customers will receive notifications (email or text) once their order is ready for pickup, ensuring that they know when they can come to collect it.

## SUPPORT INFORMATION ON WEBSITE AND APP

- **Dedicated Help Section**: UGS's website and app feature an easily accessible help section where customers can find frequently asked questions (FAQs), delivery policies, return instructions, and troubleshooting tips.
- **Order Status & Tracking**: Customers can log into their account on the website or app to check their order status, view delivery tracking information, and get an estimated delivery date. This transparency reduces confusion and helps customers track their orders in real time.
- **Contact Details on Each Page**: UGS ensures that contact information for customer support (phone number, email, and live chat option) is prominently displayed across all pages of the website, making it easy for customers to get help whenever they need it.

## PROMPT ORDER ACKNOWLEDGMENTS

UGS prioritizes quick and clear communication when acknowledging customer orders to create a smooth and reassuring shopping experience.

**Immediate Order Acknowledgment**

- **Order Confirmation Email/Text**: As soon as a customer places an order, they will receive an automatic confirmation email or text message. This includes essential details such as the products ordered, the estimated delivery time, the shipping address, and the order number.
- **Order Summary**: The acknowledgment message provides an order summary, ensuring customers can verify that the correct items and quantities were selected. This is helpful in preventing confusion or errors in order processing.

- **Inventory Updates**: If any items are out of stock or back-ordered, customers are informed immediately upon order acknowledgment. We will offer alternative options or the ability to cancel or adjust the order if necessary.

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UGS's order processing system is designed to offer complete transparency and proactive communication to ensure that the UMW community is always informed about their orders. With features like real-time delivery time updates, comprehensive customer support, and prompt order acknowledgments, we ensure that our customers have a hassle-free experience from start to finish. By leveraging technology and a customer-centric approach, UGS ensures that students, faculty, and staff at UMW receive the best possible service in managing their orders and deliveries.

### 4. POINT OF SALE (POS) SYSTEM REQUIREMENTS

**THE FIRM SHALL ENSURE THAT ALL POINT OF SALE (POS) SYSTEMS MEET UMW'S SECURITY AND OPERATIONAL REQUIREMENTS BY ADHERING TO THE FOLLOWING CONDITIONS:**

#### A. PAYMENT PROCESSING

**I. THE FIRM MUST CONTRACT WITH A PAYMENT PROCESSING ENTITY OF ITS CHOOSING TO PROCESS CUSTOMER PAYMENTS. THIS PROCESS MUST COMPLY WITH UMW'S SECURITY STANDARDS.**

University Gear Shop acknowledges and agrees with this statement.

**II. REQUIRED DOCUMENTS INCLUDE THE MOST RECENT AOC (ATTESTATION OF COMPLIANCE) AND HTSA (HIGH-LEVEL THREAT SECURITY ASSESSMENT), BOTH INCLUDED IN THE RFP RESPONSE.**

UGS is providing its HECVAT AND PCI security documentation and will review/discuss additional documents during advanced stage discussions.

#### B. EQUIPMENT & NETWORK RESPONSIBILITY

**I. THE FIRM IS RESPONSIBLE FOR PROVIDING ALL POS EQUIPMENT NECESSARY FOR SALES AND SERVICES, BOTH ONLINE AND IN PHYSICAL LOCATIONS.**

University Gear Shop acknowledges and agrees with this statement.

**II. THE FIRM MUST PROVIDE ITS OWN NETWORK CONNECTION FOR POS OPERATIONS.**

University Gear Shop acknowledges and agrees with this statement.

#### C. SECURITY COMPLIANCE

**I. THE FIRM MUST ENSURE THAT ITS PAYMENT PROCESSING ENTITY AND OTHER BUSINESS PARTNERS UNDERGO REGULAR DATA SECURITY ASSESSMENTS.**

University Gear Shop acknowledges and agrees with this statement.

**II. AN ATTESTATION OF COMPLIANCE MUST BE PROVIDED TO UMW ANNUALLY OR UPON REQUEST BY UMW'S CIO.**

University Gear Shop acknowledges and agrees with this statement.

### D. MERCHANT IDENTIFICATION

**I. THE FIRM MUST USE ITS OWN MERCHANT IDENTIFICATION NUMBER(S) WHEN PROCESSING PAYMENTS AT PHYSICAL AND ONLINE CAMPUS STORE LOCATIONS.**

University Gear Shop acknowledges and agrees with this statement.

### E. BUSINESS PARTNER STANDARDS

**I. THE FIRM MUST ENSURE THAT ALL BUSINESS PARTNERS USE INDUSTRY-STANDARD AND UP-TO DATE SECURITY TOOLS AND TECHNOLOGIES, SUCH AS ANTI-VIRUS PROTECTIONS AND INTRUSION DETECTION METHODS. THE FIRM'S BUSINESS PARTNERS MUST MEET OR EXCEED THE FIRM'S OWN STANDARDS FOR HANDLING SENSITIVE DATA.**

University Gear Shop acknowledges and agrees with this statement.

## 5. INNOVATION AND ADAPTABILITY

**THE FIRM MUST DEMONSTRATE ITS COMMITMENT TO INNOVATION AND CONTINUOUS INVESTMENT IN NEW TECHNOLOGIES BY ADDRESSING THE FOLLOWING:**

### A. TECHNOLOGY INVESTMENT

**I. THE FIRM SHOULD DETAIL ITS DEDICATION TO THE DEVELOPMENT OF NEW PRODUCTS AND SERVICES THAT MEET THE NEEDS OF UMW AND THE ACADEMIC COMMUNITY. THIS INCLUDES ANTICIPATING AND ADAPTING TO MARKET CHANGES AND TECHNOLOGICAL ADVANCES.**

Because Ambassador is data-driven, we have unique insights into student trends, needs and demands. These analytics help shape our product and technology roadmaps to address students' needs both today and tomorrow. Our longevity in the education technology space speaks to our success both operationally and financially. Always looking forward, we have the necessary capital resources in place to fuel our continued growth, to invest in ongoing product and service advancements, and to scale your course materials programs to meet your goals.

In an era where consumer behaviors and retail expectations are rapidly evolving, UGS is dedicated to transforming the campus store experience through innovation, adaptability, and strategic engagement. By embracing digital transformation, leveraging data-driven product selection, and enhancing both in-store and online shopping experiences, we ensure that the campus store remains relevant and responsive to market trends. Our approach prioritizes community engagement, sustainability, and technological advancements to create a dynamic retail environment that serves students, faculty, alumni, and a broader audience. Through continuous adaptation and strategic initiatives, UGS is committed to aligning with evolving consumer preferences while strengthening the University of Mary Washington's brand presence.

### B. INNOVATION STRATEGY

**I. PROVIDE AN EXPLANATION OF HOW THE FIRM PROACTIVELY DEVELOPS TECHNOLOGY SOLUTIONS TO ALIGN WITH THE EVOLVING NEEDS OF THE ACADEMIC SECTOR.**

### AMBASSADOR'S INNOVATION AND PRODUCT DEVELOPMENT STRATEGY

Content formats and delivery have evolved, and that trend continues to accelerate. Content comes in a multitude of formats to cater to the different needs of each learner - print, courseware, homework tools, self-study tools, assessments, adaptive learning, eBooks, and other embedded and active content. Ambassador believes the fragmentation of resources can be resolved through a single platform approach. Our course materials platform, RODA, brings everything together in an efficient and cost-effective manner, making content simple for students to access and schools to manage. As content creators' race to be first to market with the latest and greatest, it will be even more difficult for schools to vet new materials for authoritativeness, suitability to the learning objectives, and cost effectiveness. Ambassador's solutions are an asset as schools assess various formats and accessibility.

Additionally, learning platforms will collect more and more data and that data will become the backbone of expanding our understanding of how each student learns. This knowledge will allow for more effective adaptive learning and improved outcomes. Predictive analytics, and specifically data that comes from course materials and content usage, will allow educators to more quickly identify student learners in need of additional support and/or accommodations for their learning styles. Ambassador aggregates massive amounts of data across your platforms that would be nearly impossible for a school to do on its own. Our goal is to provide complete transparency, delivering the data and analytics you need to make informed decisions and steer your vision.

For decades, schools and publishers have trusted Ambassador to simplify course materials adoption, management, delivery and access. We are always thinking of new and better ways to support the course materials lifecycle, making it easier for students, schools and publishers to learn, work and collaborate. Ambassador continues to develop technology solutions that can handle the current course materials needs of your school and your students, as well as the long-term viability of your program within the rapidly changing course materials market.

# J. PAYMENT OPTIONS:

**LIST THE PAYMENT OPTIONS THAT YOUR FIRM OFFERS BOTH IN-STORE AND ONLINE. REQUIRED TENDERS FOR A PHYSICAL AND/OR AN ONLINE STORE INCLUDE BUT ARE NOT LIMITED TO CREDIT CARD, FINANCIAL AID, DEPARTMENTAL CHARGES, UMW EAGLEONE CARD, AND GIFT CARDS.**

With Ambassador, students can pay for course materials using multiple forms of payment or combination of payment types. Ambassador accepts credit cards, PayPal, debit cards, and financial aid payment or vouchers. Students who use financial aid/vouchers will see current balances in the top right corner throughout the ordering process. If a student's purchase exceeds the approved voucher spending cap limit set by you, Ambassador's single transaction processing feature allows the student to complete the purchase with a credit/debit card. You may restrict which items may or may not be paid by voucher.

UGS makes purchasing easy and efficient. We accept the following tender types:

- Cash
- Credit Card – Visa, Mastercard, American Express, Discover
- Apple Pay
- Google Pay
- PayPal
- Cash App
- Gift Cards
- Eagle One Card

### 1. REFUNDS

### A. PROPOSE A REFUND POLICY FOR EACH BUSINESS SEGMENT.

#### AMBASSADOR'S RETURN AND REFUND POLICY

Ambassador offers a competitive return policy. We accept returns within 30 days of the purchase, or 30 days after the start of the semester, whichever is later. To facilitate student returns, students can ship the item back to Ambassador by easily generating a return-shipping label on the Online Bookstore or they can use their own shipping option with a tracking number. If applicable, they also can return items to the campus store. The student indicates reason for the return, packs the materials and ships the item(s) to us. The student is **not charged any return or restocking fees**. If shipping an item back, the student generated return-shipping label cost is deducted from their refund. As soon as a package is scanned in at the warehouse and the condition is verified, the item is refunded to the student in the format used for purchase.

General guidelines to expedite the return process and receive a refund include:

- New course materials must be returned in new, unopened condition.
- All components of a bundled item must be returned together in the same box.
- All shrink-wrapped items must be returned unopened and in the original wrap.
- Digital content cannot be returned for refund if accessed, activated, downloaded, redeemed, revealed, or scratched.
- PODs (Print-On-Demand) are not returnable. Once a POD is purchased, the corresponding eBook becomes non-returnable.
- Damaged materials may be exchanged if they are received damaged and we are notified upon receipt of the damaged materials.
- Rental returns are based on rental policies and must be returned in original condition.
- Special ordered items, electronics and imprinted/branded merchandise are non-returnable.

#### UGS REFUND POLICY

A valid receipt or packing slip is required for all refunds or exchanges. Shipping and handling fees are not refundable. All merchandise that is unopened and in original condition can be returned within 30 days of purchase. In-person refunds can be given in the campus gear shop.
Returns by mail:

1. Include a copy of the confirmation email or order details with the securely packaged return. If this information is not available, include a note with name, email address, phone number, and order number. The refund could be delayed if we cannot identify the original purchase details.
2. Return shipping is at the expense of the customer. UGS is not liable for lost or damaged packages.
3. Maintain tracking information and the shipping receipt until the refund has been received.

### 2. PROMOTIONAL OFFERS: THE FIRM SHOULD PROMPTLY EXTEND ANY SPECIAL EDUCATIONAL OR PROMOTIONAL DISCOUNTS TO THE UNIVERSITY, INCLUDING THE DURATION OF SUCH OFFERS.

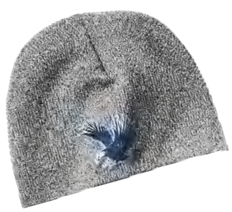
Ambassador and University Gear Shop acknowledge and agree with this statement.

## K. GENERAL MERCHANDISE:

### 1. THE UNIVERSITY IS LOOKING FOR A FIRM THAT CAN OFFER A SELECTION OF "SOFT GOODS" SUCH AS, BUT NOT LIMITED TO OFFICE AND ART SUPPLIES, UNIVERSITY EMBLEMATIC APPAREL AND MEMORABILIA, AND SUCH OTHER RELATED GOODS. PROVIDE EXAMPLES OF "SOFT GOODS" PROPOSED FOR UMW'S GENERAL MERCHANDISE STORE.

UGS purchases and owns 100% of the in-store and online merchandise inventory. We will purchase inventory based on demand and will provide product design, assortment, order management and supplier recommendations for specific school requested merchandise such as lab coats, goggles, patches, diploma frames, and graduation products. We offer a broad range of product lines found in university stores such as apparel (adult and youth), hats, outerwear, fashion accessories, bags, drinkware, writing instruments, lanyards, jewelry, decals, plush toys, technology accessories and office supplies. We also provide specialty supplies like stethoscopes, scrubs, architecture kits, and culinary kits for academic programs such as Nursing, Architecture and Culinary Arts. Through research and sales trend analysis, we carefully select our merchandise and manage inventory levels based on:

- Categorization and prioritization of products to help us understand the merchandise turn cycles. We categorize our products into 3 groups:
    - **Group A –** higher priced items that we need less of, but are essential to the product mix
    - **Group B –** moderately priced items that sell faster than group A
    - **Group C –** lower priced items that sell quickly and need quicker replenishment
- Electronic tracking of supplier, sku, price, cost, and sales
- Periodic inventory audits to ensure the inventory on the floor matches the system count
- Analysis of supplier performance to ensure that all suppliers meet our in-hand dates, have efficient order and invoicing processes, and carry out high-quality merchandise at a reasonable cost. Among our suppliers are:
- Apparel
    - Blue 84
    - Cutter & Buck
    - MV Sport
    - Untuck It
- Collectibles and School Supplies
    - Herff Jones
    - 3M/Post It
- Accessories
    - Jardine Associates
    - Logo Concepts
    - MCM Brands
    - Zypher






## INVENTORY CONTROL & MERCHANDISING

UGS balances supply and demand for products in a constant cycle of selling and restocking, anticipating the needs of our customers for new products. Through automation, inventory needs are forecasted resulting in stock replenishment in a timely fashion. By researching style trends and understanding the need for fundamental "must-have" products, we offer a merchandise mix aligned with the needs of the campus community.

We have access to 2000+ preferred vendors to ensure that UGS has the right products for campus in-store and online sales. We have ready access to over one million high quality products, many from trusted brands like:

Product shipments are received in a set procedure, checking to ensure that the merchandise has arrived in good condition and in the proper quantity. Products are entered into the inventory management system for tracking and routed to the proper location in the store and prepared for sale. Damaged goods are returned according to vendor specific protocols.

**2. THE FIRM SHALL ONLY PURCHASE EMBLEMATIC GOODS BEARING THE UNIVERSITY NAME, MARKS, AND LOGOS FROM LICENSED VENDORS. THE FIRM'S VENDORS SHALL HAVE APPROVAL FROM THE UNIVERSITY THROUGH ITS LICENSING OFFICE BEFORE USING THE UNIVERSITY MARKS ON MERCHANDISE. THE UNIVERSITY WILL GRANT THE FIRM THE RIGHT TO SELL APPROVED UNIVERSITY LICENSED PRODUCTS; HOWEVER, THE RIGHT IS NOT EXCLUSIVE AND IS SUBJECT TO THE PAYMENT BY LICENSED VENDORS OF ESTABLISHED LICENSE FEES.**

University Gear Shop acknowledges and agrees with this statement.

**A. DESCRIBE HOW YOUR FIRM WILL WORK WITH UMW LICENSING TO ESTABLISH AND MAINTAIN A WORKFLOW TO ENSURE ALL PRODUCTS BEARING THE UNIVERSITY NAME, MARKS AND LOGOS HAVE BEEN APPROVED PRIOR TO BEING PLACED ON THE SALES FLOOR OR WEBSITE FOR RESALE.**

UGS is committed to adhering to the University of Mary Washington (UMW) licensing requirements and maintaining a strong partnership with UMW's licensing office. This ensures that all products bearing the UMW name, marks, logos, or other intellectual property are appropriately approved before being offered for sale on the sales floor or through UGS's online store. We have developed a structured workflow to ensure compliance and protect the integrity of UMW's brand.

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## ESTABLISHMENT OF A CLEAR LICENSING WORKFLOW

**Initial Product Submission and Design Approval**

- Design and Product Creation: Before any product bearing UMW's name, marks, or logos is designed or produced, UGS will initiate the approval process by submitting all product designs to the UMW licensing office. This includes apparel, accessories, and any other merchandise that will bear university trademarks.
- Design Submission Portal: UGS will utilize the preferred submission portal, either digital or physical, provided by UMW's licensing office to send detailed mockups, product specifications, and materials to be reviewed.
- Approval Process Timeline: UGS will adhere to a clear timeline for the submission process. Typically, designs will be submitted for review at least 4-6 weeks prior to the desired production date to ensure that all necessary approvals are obtained in time.
- Collaborative Review: UGS will work directly with the licensing office to address any requested modifications or revisions to product designs, ensuring they align with UMW's branding guidelines, trademark policies, and aesthetic standards.

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## COORDINATION WITH UMW LICENSING FOR COMPLIANCE

**Compliance Checklist and Brand Guidelines**

- Detailed Review of Guidelines: UGS will ensure that all products are designed and produced in full compliance with UMW's brand standards and guidelines. UGS will maintain an up-to-date copy of these standards and reference them during the design process to prevent the submission of non-compliant products.
- Trademark Usage: UGS will pay close attention to how UMW's trademarks and logos are applied, ensuring proper scaling, colors, fonts, and usage rules are followed. This includes verifying the proper placement of logos on products, apparel, and merchandise.
- Product Licensing Agreement: UGS will work with UMW's licensing office to ensure that all vendors and manufacturers producing UMW-branded items are properly licensed to do so.

- UGS will not engage with unlicensed manufacturers and will require proof of licensing from any third-party suppliers.
  Approval Workflow
- Pre-Approval for Production: Once designs are finalized, UGS will submit them to the UMW licensing office for formal approval before production begins. UMW will review the product for proper trademark usage, adherence to brand guidelines, and overall quality control.
- Approval Documentation: UGS will keep a record of approval documentation for all products to ensure that each item is fully authorized by UMW's licensing office. These documents will be maintained for audit purposes and to ensure consistent compliance.

## PRODUCT MONITORING AND UPDATES

**Tracking and Auditing**

- Ongoing Compliance: Once products have been approved and placed for sale, UGS will continue to monitor their presence on both the sales floor and the online store to ensure that they remain compliant with UMW's guidelines. UGS will perform periodic internal audits of merchandise to confirm proper trademark usage and branding.
- Update of Products: If UMW's branding or trademark guidelines change over time, UGS will work closely with the licensing office to update products in compliance with new policies or updated design elements.
- Inventory Management System: UGS's inventory management system will track all UMW-branded products, ensuring that only licensed products are available for sale. If an item is found to be non-compliant or has expired approvals, it will be promptly removed from both the sales floor and the online store.

## ONLINE STORE AND MARKETING COMPLIANCE

**Online Approval and Monitoring**

- Web Product Approval: Similar to in-store products, all merchandise featured on UGS's online store that bears UMW branding will be submitted to UMW's licensing office for approval before being listed for sale. UGS will include mockups, product descriptions, and images for online products to ensure that the designs meet UMW's approval.
- Marketing and Promotions: UGS will submit any marketing materials or campaigns involving UMW-branded products for review to ensure that all advertisements and promotional efforts reflect the university's branding guidelines and licensing requirements.
- Digital Inventory: The online store's product listings will be regularly audited to ensure only approved, licensed UMW merchandise is available for purchase. Any items that are unapproved or no longer licensed will be removed immediately.

## MAINTAINING ONGOING COMMUNICATION WITH UMW LICENSING

**Regular Check-Ins and Updates**

- Dedicated Licensing Liaison: UGS will appoint a dedicated team member to work directly with UMW's licensing office, ensuring that communication remains clear and effective throughout the approval process. This liaison will be responsible for tracking all submissions, approvals, and compliance measures.
- Quarterly or Annual Review Meetings: UGS will schedule regular meetings with UMW's licensing office, either quarterly or annually, to review new products, update branding guidelines, and discuss any changes in licensing requirements.
- Collaborative Feedback: If any compliance issues or concerns arise during the approval process or post-launch, UGS will address them promptly with the licensing office, making any necessary changes to products or sales practices.

UGS is committed to a streamlined and collaborative process with UMW's licensing office to ensure that all products bearing the university's name, marks, and logos are properly approved before being placed on the sales floor or website for resale. By adhering to UMW's guidelines and maintaining transparent communication throughout the product lifecycle, UGS ensures compliance, brand integrity, and a high standard of quality for all UMW-branded merchandise sold to students, faculty, and staff.

## 3. OUTLINE YOUR OVERARCHING PHILOSOPHY REGARDING MERCHANDISING AND EXPLAIN HOW THIS PHILOSOPHY INFLUENCES THE CHOICE OF MERCHANDISE, ENSURING IT MEETS THE UNIVERSITY COMMUNITY'S NEEDS AND EXPECTATIONS.

Please see the response to **Question #1 of the General Merchandise** section.

## A. DETAIL HOW YOUR MERCHANDISING APPROACH AFFECTS PRICING, WITH A FOCUS ON MAKING ITEMS AFFORDABLE FOR THE UNIVERSITY COMMUNITY WHILE MAINTAINING QUALITY.

UGS's merchandising approach is designed to balance affordability and quality, providing University of Mary Washington (UMW) students, faculty, and staff with high-quality products that are accessible within a reasonable price range. Our approach focuses on aligning with the university's values while ensuring that pricing is competitive, fair, and considerate of the economic diversity within the UMW community. Below, we outline how UGS's merchandising strategy affects pricing and the measures taken to maintain affordability without compromising quality.

### UNDERSTANDING THE MARKET AND COMMUNITY NEEDS

**Student and Faculty Demographics**

- Target Audience Analysis: UGS conducts regular analysis of the UMW community, including students, faculty, and staff, to understand their purchasing power and preferences. This helps us determine the most appropriate price points for various product categories (e.g., clothing, accessories, textbooks, and school supplies).
- Affordability Focus: We recognize that students, especially those in undergrad programs, are often on fixed or limited budgets. This informs our approach to selecting items that are both affordable and of high value, ensuring that products are priced within reach of the typical UMW student.
- Diverse Price Ranges: UGS offers a range of products with different price points to accommodate different budgets. For example, we offer lower-cost options such as t-shirts and school supplies alongside premium items such as high-quality outerwear or exclusive university-branded merchandise.

### COMPETITIVE PRICING STRATEGY (GOOD, BETTER, BEST)

**Benchmarking Against Competitors**

- Market Research: UGS regularly monitors competitors, including other campus stores, online marketplaces, and nearby retail outlets. This helps ensure that our pricing remains competitive without undercutting the value of UMW-branded merchandise.
- Aligning with Industry Standards: We price merchandise in a way that is aligned with both the quality of the product and the general pricing trends within the university store industry. This ensures our prices are not only competitive but also reflective of the value customers are receiving.
- Comparable Pricing with External Retailers: In cases where UMW-branded products are also available through external retailers, UGS ensures that our prices are comparable, considering shipping costs, exclusivity, and convenience.

## MAINTAINING QUALITY WHILE MANAGING COST

**Quality Sourcing and Vendor Relationships**

- Partnering with Trusted Vendors: UGS works with trusted suppliers and manufacturers known for producing high-quality goods. We maintain long-term relationships with vendors to ensure both product consistency and favorable pricing agreements. Through bulk purchasing and negotiated pricing, we can offer quality merchandise at affordable prices.
- Quality Control: Every product that UGS offers undergoes strict quality control procedures. We ensure that products meet UMW's standards in terms of durability, design, and functionality, which ultimately helps customers get the best value for their money.
- Materials and Construction: For apparel and accessories, UGS sources durable materials, such as high-quality cotton and fabric blends, which ensure that items last longer despite being offered at affordable prices. This reduces the need for frequent replacements, thus providing better overall value to the consumer.

**Cost Efficiency in Operations**

- Optimizing Inventory and Stock Management: UGS uses a demand-based inventory system that ensures we only stock products based on real-time customer demand. This prevents overstocking, minimizes markdowns, and helps to keep prices lower. We work closely with UMW to forecast demand accurately and ensure that the products on the sales floor are those that are most likely to sell, reducing waste and costs.
- Economies of Scale: UGS maximizes economies of scale by placing larger orders with suppliers, which allows us to pass savings onto the customer without sacrificing the quality of products. Bulk purchasing enables us to offer lower prices on frequently sold items such as apparel, school supplies, and accessories.

## DISCOUNT PROGRAMS AND PROMOTIONS

**Special Discounts for the UMW Community**

- Student Discounts: UGS offers regular student discounts, either through seasonal sales or by providing a percentage off specific product categories. Discounts are also given to faculty and staff, ensuring that every member of the UMW community can access affordable products.
- Seasonal Sales and Clearance: UGS organizes seasonal sales, including back-to-school promotions, end-of-year clearance sales, and holiday discounts. These sales provide UMW students with the opportunity to purchase merchandise at significantly reduced prices, helping to manage their budgets during critical times in the academic year.
- Loyalty Programs: UGS is open to implementing loyalty programs for frequent customers, rewarding them with points, discounts, or exclusive offers. This encourages repeat purchases and creates an incentive for customers to continue shopping at UGS while keeping their costs manageable.

University Gear Shop understands the importance of value-priced items and the role they play in an overall affordable offering. Out procurement strategy allows University Gear Shop to provide entry price points that don't break the bank. We have heard from our customers, and we have listened. The following are items and price points within our value-priced program:

- Value-Priced T-shirts – Starting at $16.95
- Value-Priced Crewneck Sweatshirt – Starting at $29.95
- Value-Priced Hooded Sweatshirt – Starting at $39.95
- Value-Priced Long Sleeve T-shirt - $24.95

### TRANSPARENCY IN PRICING AND VALUE COMMUNICATION

**Clear Pricing and Product Information**

- Visible Pricing: UGS ensures that all products have clear and visible pricing on both the sales floor and online store. Customers can easily compare prices, making it simpler to choose products based on their needs and budget.
- Highlighting Value: On product tags and online listings, UGS highlights the added value of products. For example, when selling branded apparel, UGS will mention its durability and long-lasting design, which justifies its price, providing customers with a deeper understanding of the product's worth.

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### SUSTAINABILITY AND ETHICAL PRICING

**Sustainable Sourcing and Ethical Production**

- Sustainable Merchandise Options: UGS is committed to offering sustainable product options, such as eco-friendly apparel or reusable items, at affordable prices. We aim to provide these environmentally conscious products at prices that are accessible to the UMW community.
- Ethical Vendor Partnerships: We partner with vendors who meet fair labor standards and practice ethical production methods. This ensures that our products are produced with consideration for both the environment and the workers involved, while still maintaining an affordable price range.

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UGS's merchandising approach focuses on making products affordable for the UMW community without compromising quality. Through strategic vendor partnerships, competitive pricing, efficient inventory management, and customer-centric promotions, we ensure that students, faculty, and staff have access to high-quality merchandise at reasonable prices. By maintaining transparency, offering discounts, and continuously optimizing our pricing strategy, UGS remains committed to providing the best value to the UMW community while supporting the university's mission.

## B. INCLUDE ANY MARKET RESEARCH EFFORTS AND HOW YOU WORK WITH THE UNIVERSITY TO DETERMINE NEW PURCHASES OR PHASE OUT EXPIRED MERCHANDISE.

UGS understands that effective merchandising requires continuous adaptation to evolving market trends and the needs of the University of Mary Washington (UMW) community. Our approach to market research and collaboration with UMW ensures that we remain responsive to customer preferences and that the campus store's offerings reflect the current demand while eliminating outdated or expired merchandise. Below, we detail how UGS conducts market research, works with UMW to identify new products, and manages the phase-out process for expired or obsolete items.

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### MARKET RESEARCH EFFORTS

**Student and Faculty Surveys**

- Annual or Biannual Surveys: UGS conducts regular surveys among students, faculty, and staff to gather feedback on their purchasing habits, preferences, and desired product categories. These surveys help UGS stay informed about the types of merchandise the UMW community values most, such as specific apparel, accessories, tech gear, or school supplies.
- Product Feedback: Surveys and informal feedback channels ask customers to rate product quality, style, and price. We also inquire about potential new products or brands they'd like to see in the store. This data is instrumental in shaping our purchasing decisions for the upcoming semesters.

- Focus Groups: UGS occasionally holds small focus groups with UMW students or faculty to discuss new product ideas, seasonal offerings, and customer satisfaction with current merchandise. These sessions provide in-depth insights into what the campus community wants. Sales Data Analysis
- Sales Trend Analysis: UGS regularly analyzes sales data from both in-store and online purchases. This analysis identifies which products are performing well and which are lagging in sales. By monitoring these trends, we can adjust our inventory levels, remove underperforming items, and introduce new, more popular products.
- Seasonal Demand Patterns: UGS tracks seasonal shifts in product demand, such as increased sales of apparel during back-to-school periods, graduation items, and fan gear for athletic events. This helps us forecast and plan purchases based on seasonal peaks.
- Competitive Benchmarking: UGS conducts market research on competitors, including other campus stores, local retailers, and online merchants. This includes tracking merchandise pricing, popular product types, and emerging trends in higher education retail. UGS ensures its product offerings stay competitive and meet the expectations of the UMW community while maintaining affordability.

**Customer Behavior and Preferences**

- In-Store Observations: UGS staff routinely observe customer preferences in-store, noting which items are frequently browsed, tried on, or purchased. Staff members are trained to engage with customers to gather feedback directly about product preferences and potential new merchandise.
- Online Behavior Tracking: UGS also tracks customer behavior on its website, using analytics tools to understand which products are frequently viewed, added to carts, or purchased. This data helps refine product offerings and adjust inventory to meet customer needs.

## COLLABORATION WITH UMW TO DETERMINE NEW PURCHASES

**Regular Meetings with UMW Stakeholders**

- Stakeholder Input: UGS regularly meets with UMW leadership and various departments, including student affairs, athletics, and academic departments, to discuss the evolving needs of the university community. These meetings offer valuable insights into upcoming trends, events, and seasonal activities that may influence purchasing decisions.
- Partnership with UMW Faculty and Staff: UGS actively seeks input from faculty and staff regarding academic and professional needs, ensuring that any necessary supplies or items for specific disciplines (e.g., art supplies, lab materials) are stocked. Additionally, input on desired types of school-branded items (e.g., work attire, office accessories) is also gathered.
- University-Specific Events: UGS collaborates with UMW to anticipate new opportunities for merchandise related to university events, such as homecoming, graduation, conferences, or sporting events. This partnership allows UGS to stay proactive in introducing event-specific merchandise at the appropriate times.

**Trend Identification and Market Research Insights**

- Trend Forecasting: UGS works closely with UMW to identify emerging trends in student life, technology, and fashion that might influence new product lines. UGS attends trade shows, monitors social media, and reviews retail reports to stay ahead of the curve and bring in new products that will be relevant to the UMW community.
- Sustainability and Ethical Sourcing: UGS and UMW collaborate on initiatives to bring in more sustainable products that align with the university's values. This includes sourcing eco-friendly materials for clothing, accessories, and stationery, ensuring that the campus store aligns with the university's commitment to sustainability.

## PHASE-OUT OF EXPIRED OR OBSOLETE MERCHANDISE

**Product Lifecycle Management**

- End-of-Life Evaluation: UGS regularly evaluates the product lifecycle of all items in the store. Products are monitored to assess when they reach the end of their lifecycle—whether due to lack of demand, seasonality, or expiration of licensing agreements (e.g., outdated logo designs or marks).
- Clearance Sales: When merchandise is identified as expired or obsolete, UGS runs clearance sales to make room for new inventory. These sales are promoted through in-store displays, email newsletters, and online platforms to maximize the sale of remaining items before they are phased out.
- Product Rotation: UGS ensures the rotation of inventory to ensure that newer, more relevant products are always front and center, and expired or unsold items are gradually removed from high-traffic areas of the store.

**Disposal and Donation Options**

- Sustainability Practices: UGS is committed to environmentally responsible disposal methods. Expired merchandise that cannot be sold is donated, repurposed, or recycled wherever possible. Items that are still in good condition but have reached the end of their sales lifecycle may be donated to local charities or used for campus events.
- Inventory Management Systems: UGS utilizes inventory management systems that track product age, sales performance, and expiration dates. These systems automatically flag outdated products, ensuring they are removed from the sales floor promptly.

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UGS's approach to market research, in collaboration with UMW, enables us to consistently offer fresh and relevant products while maintaining affordable pricing. By leveraging surveys, sales data, and feedback from UMW stakeholders, UGS ensures that our offerings meet the needs of the campus community. Additionally, our proactive phase-out strategy for expired merchandise allows us to maintain a dynamic and appealing product selection, ensuring that UMW students, faculty, and staff always have access to the best selection of high-quality, university-branded merchandise.

## C. DEFINE WHAT AFFORDABLE WOULD LOOK LIKE AS IT RELATES TO BOTH MEN'S AND WOMEN'S APPAREL AND THE PERCENTAGE OF AFFORDABLE ITEMS YOU WOULD PROPOSE HAVING IN THE STORE/WEBSITE.

At UGS, affordability is defined by offering products that are accessible to the diverse financial situations of the University of Mary Washington (UMW) community, without compromising on quality. Specifically, for both men's and women's apparel, affordability is achieved through a blend of lower-cost options alongside mid-range and premium choices that provide students, faculty, and staff with various price points to suit their budgets.

We aim to ensure that UGS's apparel offerings are not only aligned with market standards but also ensure value for money across different demographics within the UMW community.

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## AFFORDABLE PRICING FOR MEN'S AND WOMEN'S APPAREL

**Value-Priced Program:**

- Core Offering: The *Value-Priced Program* is a critical aspect of UGS's pricing strategy. It includes a range of men's and women's apparel that is priced for affordability while maintaining quality and the UMW brand's integrity.
- Target Price Range: Affordable apparel typically falls within the $16 to $40 range, which aligns with student budgets and allows for everyday purchases, such as t-shirts, hoodies,

and sweatshirts. These items will be simple, stylish, and widely popular within the UMW community.

- Essential Items: The Value-Priced Program will feature staple items, such as basic branded t-shirts, sweatpants, hats, and socks, which are perfect for everyday wear and casual campus environments. These items offer customers accessibility while reinforcing school spirit.

**Good, Better, Best Procurement Approach:**

- Good (Entry-Level): The "Good" category represents affordable, entry-level apparel that is accessible to the widest range of students. These products will feature basic branding (such as the UMW logo) and will be priced at the lower end of the range, typically between $16 and $40.
- Better (Mid-Range): The "Better" category will include a slightly more premium selection of apparel with enhanced fabrics, styles, and additional features, such as eco-friendly materials or more sophisticated designs. These products will be priced between $40 and $70, appealing to students and faculty looking for slightly higher quality without going into premium pricing.
- Best (Premium): The "Best" category will include high-quality, fashion-forward, or performance-based apparel items, such as outerwear, advanced fabric materials, or limited edition pieces. These products will be priced above $70, catering to customers who are willing to invest in higher-end, long-lasting items for special occasions or fashion-conscious purchases.

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UGS's approach to pricing men's and women's apparel at the University of Mary Washington ensures that all members of the UMW community—regardless of budget—have access to quality, university-branded merchandise. By offering a variety of pricing options through the *Value-Priced Program* and the *Good, Better, Best* procurement approach, UGS is able to provide affordable items while maintaining product quality and appeal. With 75%-80% of the selection focused on value-priced, good, and better accessible items, UGS ensures that affordability is a cornerstone of the apparel offerings while also providing a range of options for those seeking higher-end apparel.

## D. DESCRIBE ANY MEASURES IN PLACE TO BALANCE QUALITY WITH COST-EFFECTIVENESS.

UGS is committed to providing high-quality products at competitive prices while ensuring affordability for the University of Mary Washington (UMW) community. Our strategy for balancing quality with cost-effectiveness involves a combination of strategic sourcing, vendor partnerships, bulk purchasing, product testing, and a tiered pricing structure to maintain value without compromising on durability, comfort, or brand integrity.

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### STRATEGIC SOURCING AND VENDOR PARTNERSHIPS

UGS collaborates with reputable manufacturers and suppliers who specialize in high-quality, cost-effective collegiate merchandise. By leveraging long-standing relationships with these vendors, we secure better pricing on bulk orders while ensuring that all products meet or exceed UMW's quality expectations.

- Preferred Vendor Agreements: UGS negotiates with key vendors to obtain lower costs without sacrificing material quality or craftsmanship.
- Sustainable & Ethical Sourcing: We prioritize vendors that offer sustainable materials and ethical manufacturing processes while maintaining reasonable price points.
- Private Labeling Opportunities: By working directly with manufacturers to produce exclusive UMW-branded apparel and merchandise, UGS eliminates unnecessary markups, passing the savings on to customers.

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## Deep Access to Brands, High Quality Products, On-Trend Apparel, Tech Accessories and So Much More...

### BULK PURCHASING & INVENTORY MANAGEMENT

UGS strategically manages inventory to optimize costs and prevent overstock or understock situations, which can lead to markdowns or lost sales.

- Bulk Order Discounts: We maximize savings by purchasing larger quantities of high-demand items at reduced prices while negotiating volume-based discounts.
- Data-Driven Inventory Forecasting: UGS utilizes historical sales data, seasonal demand trends, and customer insights to determine optimal order quantities and avoid excessive surplus or stockouts.
- Centralized Distribution: Leveraging regional distribution centers helps lower shipping costs and ensures a steady supply of affordable merchandise.

### GOOD, BETTER, BEST PROCUREMENT APPROACH

UGS follows a tiered pricing model to offer a range of product options at different price points, ensuring affordability while allowing customers to choose higher-quality items if desired.

- Good (Value-Priced Program – 40-45%): Affordable, entry-level items that maintain essential quality while keeping prices low ($16-$40).
- Better (Mid-Range – 30-35%): Mid-tier options with improved fabric, fit, and design, offering enhanced durability at a moderate price point ($40-$70).
- Best (Premium – 15-20%): High-quality, premium apparel and accessories with superior materials, advanced performance features, or exclusive branding ($70+).
  This procurement strategy ensures that all students, faculty, and staff can find suitable options within their budget without compromising on quality.

### COST-SAVING INITIATIVES WITHOUT QUALITY COMPROMISE

UGS continuously explores ways to reduce operational costs while maintaining product integrity, passing savings on to the UMW community.

- Efficient Supply Chain Management: Streamlining logistics and minimizing excess handling costs to keep pricing competitive.
- Sustainable Alternatives: Utilizing recycled or organic materials that reduce costs over time while promoting sustainability.
- Technology Integration: Leveraging AI-driven inventory systems to improve purchasing accuracy and reduce waste.

UGS achieves the ideal balance between quality and cost-effectiveness by employing strategic sourcing, bulk purchasing, tiered pricing, rigorous quality control, and operational efficiencies. Through these measures, UGS ensures that the University of Mary Washington community has access to high-quality, affordable merchandise that meets their needs and budget while maintaining brand integrity and long-term sustainability.

## E. HOW WILL YOU ENSURE THAT YOUR MERCHANDISE PRICES ARE COMPETITIVE IN THE LOCAL AREA?

UGS is committed to maintaining competitive merchandise pricing by continuously monitoring the local market, leveraging vendor relationships, and implementing strategic pricing models. Through regular market research, bulk purchasing, and dynamic pricing adjustments, we ensure that our offerings remain affordable while upholding quality standards. Additionally, we provide a range of price points, promotions, and discount programs to meet the diverse needs of students, faculty, and the broader campus community. By prioritizing transparency and responsiveness to customer feedback, UGS strives to deliver fair and competitive pricing that aligns with both institutional expectations and consumer demand.

To ensure that UGS maintains competitive pricing for merchandise in the local area, we will implement the following strategies:

1. **Market Research & Price Monitoring**
    - Regularly analyze prices at competing bookstores, retail stores, and online platforms.
    - Utilize price-comparison tools and industry reports to benchmark against similar quality merchandise.
2. **Dynamic Pricing Strategy**
    - Adjust pricing based on demand, seasonality, and promotional trends.
    - Offer student discounts, bundle deals, and loyalty programs to provide better value.
3. **Vendor Negotiations & Bulk Purchasing**
    - Leverage strong vendor relationships to secure cost-effective bulk purchasing agreements.
    - Work with local vendors where it is possible to minimize shipping and logistics costs.
4. **Affordability Tiers**
    - Offer a mix of price points, including budget-friendly options alongside premium merchandise.
    - Provide in-house or exclusive branded items that balance quality and cost.
5. **Promotions & Price Matching**
    - Implement special sales, limited-time promotions, and discounts during key academic and sports seasons.
    - Consider price-matching policies for specific high-demand items to remain competitive.
6. **Customer Feedback & Analytics**
    - Gather feedback from students and faculty to understand pricing concerns.
    - Use sales data analytics to determine which price points are most effective.

## I. THE UNIVERSITY DESIRES A MARKET BASKET COMPARISON FOR PRICING COMPARISON ON MUTUALLY AGREED UPON SELECTED ITEMS WITH NEARBY COMPETITORS AT LEAST ONCE A YEAR.

University Gear Shop acknowledges and agrees with this statement.

## 4. WHAT SCHOOL SPIRIT AND EMBLEMATIC MERCHANDISE DO YOU TYPICALLY OFFER?

UGS proudly offers a wide range of school spirit and emblematic merchandise designed to foster pride and connection within the campus community. Our selection includes high-quality apparel, accessories, drinkware, school supplies, and collectibles, all featuring official school logos, colors, and mascots. Whether students and alumni are looking for game day essentials, everyday wear, or unique keepsakes, UGS ensures a variety of options to meet diverse preferences and budgets. By continually refreshing our inventory with trending styles and seasonal items, we provide a dynamic assortment that celebrates school pride in every aspect of campus life.

UGS typically offers a diverse selection of school spirit and emblematic merchandise designed to appeal to students, alumni, faculty, and fans. Our offerings include:

1. **Apparel & Accessories**
   - T-shirts, hoodies, sweatshirts, and jackets
   - Hats, beanies, and visors
   - Socks, scarves, and gloves
   - Bags, backpacks, and tote bags
2. **Drinkware & Home Goods**
   - Water bottles, tumblers, and coffee mugs
   - Blankets, pillows, and dorm décor
   - Flags, banners, and pennants
3. **Tech & School Supplies**
   - Laptop sleeves, phone cases, and earbuds
   - Notebooks, planners, and stationery
   - Writing instruments and desk accessories
4. **Game Day & Outdoor Gear**
   - Stadium chairs, seat cushions, and tailgating accessories
   - Umbrellas and ponchos
   - Athletic wear and performance gear
5. **Novelties & Collectibles**
   - Keychains, lanyards, and stickers
   - Plush mascots and figurines
   - Limited-edition and commemorative items

## A. CLARIFY THE PROCESS FOR CHOOSING MERCHANDISE TO BE OFFERED, PARTICULARLY SCHOOL SPIRIT AND EMBLEMATIC ITEMS.

UGS follows a strategic and data-driven approach to selecting merchandise, particularly school spirit and emblematic items, to ensure alignment with campus culture, student preferences, and market trends. Our selection process involves close collaboration with university stakeholders, including administrators, student organizations, and athletics departments, to identify merchandise that best represents the school's identity.

The process includes:

1. Market Research & Sales Data Analysis – Reviewing past sales performance, student surveys, and industry trends to determine popular items and emerging styles.
2. University Branding & Licensing Compliance – Ensuring all emblematic merchandise meets university branding guidelines and licensing requirements.
3. Vendor Selection & Quality Assurance – Partnering with reputable vendors to source high-quality, durable, and competitively priced products.
4. Seasonal & Event-Based Planning – Adjusting inventory to align with academic calendars, sports seasons, and major campus events.
5. Affordability & Variety Considerations – Offering a mix of price points and product categories to accommodate different budgets and preferences.

By continuously refining our selection process based on feedback and market insights, UGS ensures that school spirit merchandise remains relevant, high-quality, and accessible to the entire campus community.

## B. EXPLAIN HOW BRANDS ARE SELECTED, ENSURING THEY ALIGN WITH THE UNIVERSITY'S VALUES AND APPEAL.

UGS carefully selects brands that align with the university's values, ensuring that merchandise reflects the institution's commitment to quality, inclusivity, sustainability, and school pride. Our brand selection process prioritizes vendors that uphold ethical manufacturing practices, adhere to university branding guidelines, and resonate with the preferences of students, alumni, and faculty.

The process includes:

1. University Standards & Licensing Compliance – Partnering with officially licensed vendors to maintain brand integrity and trademark compliance.
2. Ethical & Sustainable Sourcing – Prioritizing brands that demonstrate responsible labor practices, environmental stewardship, and sustainable materials.
3. Quality & Durability Assurance – Evaluating product materials, construction, and vendor reputation to ensure long-lasting merchandise.
4. Trend & Market Analysis – Selecting brands that appeal to students and reflect current fashion and lifestyle trends.
5. Affordability & Accessibility – Offering a diverse range of price points to ensure school spirit merchandise is accessible to all members of the campus community.

By carefully curating brands that reflect the university's mission and values, UGS delivers merchandise that enhances school pride while maintaining ethical and quality standards.

## 5. THE UNIVERSITY SHALL HAVE THE RIGHT TO RECOMMEND MERCHANDISE TO BE SOLD IN THE CAMPUS STORE AND TO REQUEST THE REMOVAL OF MERCHANDISE FOR SALE IN THE CAMPUS STORE WHICH THE UNIVERSITY CONSIDERS OFFENSIVE, INAPPROPRIATE, OR AN INADEQUATE REPRESENTATION OF THE UMW BRAND.

University Gear Shop acknowledges and agrees with this statement.

## 6. SPECIAL AND ONE-TIME EVENT MERCHANDISE COLLABORATION: THE UNIVERSITY IS INTERESTED IN INTRODUCING SPECIAL, ONE-TIME MERCHANDISE FOR OCCASIONAL EVENTS AND SEEKS TO UNDERSTAND YOUR EXPERIENCE AND APPROACH IN FACILITATING SUCH COLLABORATIONS.

UGS has extensive experience in facilitating special, one-time merchandise for major university events, leveraging our expertise in rapid production, strategic marketing, and seamless collaboration with university stakeholders. Our Hot Market capabilities enable us to quickly respond to significant achievements, such as championship wins, anniversaries, and campus milestones, ensuring timely availability of commemorative merchandise that captures the excitement of the moment.

For example, in 2024, UGS successfully executed Hot Market merchandise programs for Oakland University's basketball conference championship win and Abilene Christian University's football conference championship win. In both cases, we coordinated closely with the universities to design, produce, and distribute exclusive championship gear, including t-shirts, hats, and memorabilia, within days of the victories. Our approach included:



1. Pre-Planning & Rapid Production – Establishing pre-approved designs and vendor partnerships to enable immediate production upon event outcomes.
2. On-Campus & Online Sales Strategies – Leveraging pop-up shops, campus bookstores, and e-commerce platforms to maximize accessibility.
3. Marketing & Engagement – Utilizing social media, email campaigns, and university networks to promote the limited-edition merchandise.
4. Scalability & Inventory Management – Ensuring sufficient stock levels to meet demand while mitigating excess inventory risks.
5. University Brand Alignment – Working closely with licensing teams to maintain brand integrity and compliance with university guidelines.

With a proven track record in delivering high-impact, event-specific merchandise, UGS is well-equipped to collaborate on future special editions, ensuring that every milestone is celebrated with high-quality, sought-after products.

**A. PLEASE DESCRIBE YOUR CAPACITY AND WILLINGNESS TO WORK WITH THE UNIVERSITY IN CREATING UNIQUE, ONETIME MERCHANDISE FOR SPECIAL EVENTS. HIGHLIGHT HOW YOU ACCOMMODATE THESE DISTINCTIVE REQUESTS WHILE ENSURING TIMELY DELIVERY AND QUALITY. LIST ALL QUALIFYING CIRCUMSTANCES, SUCH AS ORDER MINIMUMS.**

UGS has the capacity and commitment to collaborate with the university in creating unique, one-time merchandise for special events, ensuring high-quality production and timely delivery. Our extensive experience in handling Hot Market events, championship wins, anniversaries, and exclusive campus celebrations demonstrates our ability to accommodate distinctive requests while maintaining brand integrity and logistical efficiency.

## HOW UGS ACCOMMODATES SPECIAL EVENT MERCHANDISE REQUESTS:

**Custom Design & Branding Expertise**

- Collaborate with university representatives to create exclusive designs that align with branding and event themes.
- Ensure all artwork complies with university licensing guidelines.

**Flexible Production & Vendor Partnerships**

- Work with a diverse network of vendors to meet unique material, design, and production needs.
- Prioritize ethical sourcing and sustainable manufacturing where applicable.

**Timely Fulfillment & Distribution**

- Pre-plan production timelines to ensure merchandise is available ahead of or immediately following key events.
- Utilize on-campus retail locations, pop-up shops, and e-commerce platforms for maximum accessibility.

**Scalability & Inventory Management**

- Offer scalable production based on expected demand to balance availability and minimize excess stock.
- Implement just-in-time ordering for rapid response to last-minute requests.

### QUALIFYING CIRCUMSTANCES & ORDER REQUIREMENTS:

- Order Minimums: Typically, a minimum order quantity applies depending on the type of merchandise.
- Lead Times: Custom production timelines vary, but standard orders require 4-6 weeks, while rush orders can be fulfilled in as little as 7-10 days depending on design complexity.
- Licensing & Approvals: All one-time merchandise must be reviewed and approved by the university's licensing office before production.
- Budget Considerations: Pricing is based on volume, customization level, and material selection, with options to accommodate different budget ranges.

By leveraging our expertise, production network, and operational efficiency, UGS ensures that every special event is celebrated with exclusive, high-quality merchandise that meets the university's expectations.

## B. SHARE EXAMPLES OF HOW YOU HAVE SUCCESSFULLY COLLABORATED WITH OTHER UNIVERSITIES TO DESIGN AND DELIVER SPECIAL OR ONE-TIME EVENT MERCHANDISE.

Please see response to **Queston #6** above.

## 7. THE UNIVERSITY DESIRES FLEXIBILITY TO UTILIZE LOCAL VENDORS FOR PRODUCTION OF UMW EMBLEMATIC MERCHANDISE. THE UNIVERSITY ALSO DESIRES TO COLLABORATE WITH LOCAL RETAIL OUTLETS TO PROMOTE UNIVERSITY GEAR IN THE STORES. PLEASE DESCRIBE YOUR CAPACITY AND WILLINGNESS TO WORK WITH THE UNIVERSITY IN PARTNERING WITH LOCAL VENDORS.

UGS is fully committed to partnering with local vendors and artisans to support the University of Mary Washington's brand while fostering strong ties within the surrounding community. By collaborating with local businesses, UGS enhances the uniqueness and appeal of campus store offerings while promoting regional craftsmanship and economic growth.

### HOW UGS FACILITATES LOCAL VENDOR PARTNERSHIPS:

**Supporting Local Artisans & Businesses**

- Partners with local artisans to develop exclusive, handcrafted merchandise that reflects the university's identity and values.
- Showcase regionally made apparel, accessories, home décor, and specialty goods that resonate with students, alumni, and visitors.

**Integrating Local Products into the Campus Store**

- Curate a selection of locally sourced products that complement traditional university-branded merchandise.
- Establish dedicated retail space within the campus store to feature rotating collections of local vendor items.

**Ensuring Quality & Brand Alignment**

- Work with vendors who meet quality standards and align with the university's commitment to sustainability and ethical business practices.
- Provide guidance on co-branded opportunities to integrate local products with the University of Mary Washington's official marks.

**Streamlined Vendor Collaboration**

- Develop a vendor application and approval process to identify and onboard businesses that meet the university's needs.
- Offer flexible purchasing models, including consignment and wholesale agreements, to support small and emerging vendors.

**Enhancing Community Engagement & Awareness**

- Promote local partnerships through in-store events, pop-up markets, and social media campaigns.
- Highlight artisan stories and product origins to create a deeper connection between the university and the surrounding community.

Through these initiatives, UGS ensures that local vendor partnerships contribute to a vibrant and diverse retail experience, strengthening the University of Mary Washington's brand while celebrating regional talent and entrepreneurship.

## 8. DESCRIBE HOW YOUR FIRM WOULD APPROACH LIMITED RELEASE MERCHANDISE, AND PROVIDE EXAMPLES OF INSTANCES WHERE YOUR FIRM MAINTAINS SUCH MERCHANDISE.

UGS takes a strategic and data-driven approach to limited-release merchandise, ensuring that exclusive products generate excitement, maintain brand integrity, and meet customer demand. Our approach focuses on pre-planning, targeted marketing, and efficient production to create a sense of urgency and exclusivity while maintaining high-quality standards.

### UGS APPROACH TO LIMITED-RELEASE MERCHANDISE:

**Event & Theme-Based Planning**

- Develop limited-edition merchandise for special occasions such as championship wins, anniversaries, campus traditions, and milestone events.
- Collaborate with university stakeholders to align product designs with branding and event messaging.

**Scarcity & Exclusivity Strategy**

- Offer products in limited quantities or timeframes to increase desirability.
- Utilize numbered editions or special packaging to enhance collectability.

**Targeted Marketing & Distribution**

- Leverage social media, email campaigns, and influencer marketing to create buzz.
- Sell through multiple channels, including campus stores, pop-up events, and online platforms.

**Pre-Orders & Demand Forecasting**

- Use pre-orders and past sales data to estimate demand and prevent overproduction.
- Implement reservation systems for high-demand items to manage inventory effectively.

### EXAMPLES OF UGS LIMITED-RELEASE MERCHANDISE:

- **Championship & Hot Market Releases –** UGS successfully launched exclusive championship apparel and accessories following **Oakland University's basketball conference win in 2024** and **Abilene Christian's football conference win in 2024**, ensuring rapid production and distribution to meet fan demand.
- **Anniversary & Commemorative Collections –** Designed and produced special-edition merchandise celebrating key university milestones, such as founding anniversaries and major athletic achievements.

- **Themed & Seasonal Drops –** Created exclusive apparel and merchandise collections tied to homecoming, graduation, and other major campus events, ensuring fresh and relevant product offerings.
  By executing a well-structured strategy, UGS ensures that limited-release merchandise drives excitement, increases engagement, and enhances school spirit while maintaining quality and logistical efficiency.

### 9. DESCRIBE OTHER GENERAL PRODUCTS YOU WILL OFFER IN EACH STORE.

UGS is committed to offering a comprehensive selection of general merchandise in each campus store, ensuring that students, faculty, staff, and visitors have access to essential products that enhance their academic and campus experience. Beyond emblematic merchandise and school spirit apparel, UGS provides a well-rounded assortment of everyday necessities, gifts, and specialty items tailored to the needs of the university community.

### GENERAL PRODUCTS AVAILABLE IN UGS CAMPUS STORES:

**Everyday School Supplies**

- Notebooks, binders, planners, and folders
- Writing instruments, highlighters, and markers
- Calculators, index cards, and study aids
- Art supplies and drafting tools for specialized courses

**Gifts & Accessories**

- Branded and non-branded jewelry, keychains, and lanyards
- Greeting cards, stationery, and university-themed gifts
- Seasonal and holiday merchandise for students and alumni
- Eco-friendly and sustainable gift options

**Tech & Tech Accessories**

- Laptops, tablets, and related peripherals
- Chargers, power banks, and adapters
- Headphones, earbuds, and Bluetooth speakers
- Laptop sleeves, phone cases, and screen protectors

**Books & Publications**

- Faculty-authored books showcasing university scholarship
- New York Times bestsellers for leisure reading and academic enrichment
- Study guides, test prep materials, and reference books
- Journals, notebooks, and academic publications

By curating a diverse selection of general products, UGS ensures that each campus store serves as a one-stop destination for academic, personal, and professional needs, enriching the overall university experience.

# L. ATHLETIC MERCHANDISE:

### 1. DESCRIBE YOUR FIRM'S ABILITY TO SELL QUALITY UMW ATHLETIC MERCHANDISE IN THE PHYSICAL AND/OR ONLINE STORE/PLATFORM, ENSURING ALL SPORTS ARE REPRESENTED AT ALL TIMES, AND THAT ATHLETIC MERCHANDISE ACCURATELY REFLECTS THE STYLE, BRANDING AND LOGOS USED BY THE UMW ATHLETIC DEPARTMENT. DESCRIBE THE FIRM'S ABILITY TO COORDINATE WITH THE UNIVERSITY'S ATHLETIC AND OTHER DEPARTMENTS TO JOINTLY MARKET AND SELL SOFT GOODS, IF REQUESTED BY THE UNIVERSITY DEPARTMENT(S).

UGS is well-equipped to provide high-quality **University of Mary Washington (UMW) athletic merchandise** through both physical and online store platforms, ensuring a strong representation of all sports. Our commitment to **brand integrity, strategic merchandising, and collaborative marketing** ensures that UMW's athletic identity is consistently reflected across all retail channels.

### ENSURING COMPREHENSIVE ATHLETIC MERCHANDISE AVAILABILITY:

**Full Sports Representation**

- Stock merchandise for all varsity sports.
- Offer a mix of general athletic branding and sport-specific apparel (e.g., soccer, basketball, swimming).

**Consistent Branding & Licensing Compliance**

- Ensure all athletic merchandise aligns with UMW's official branding, logos, and color guidelines.
- Work closely with the UMW Athletics Department and licensing partners to maintain consistency.

**Diverse Product Offerings**

- Provide **performance and fan gear**, including jerseys, hoodies, warm-ups, and accessories.
- Offer seasonal and limited-edition collections for championship games, homecoming, and rivalry matchups.

### SALES & MARKETING COORDINATION WITH UMW ATHLETIC AND OTHER DEPARTMENTS:

**Collaborative Marketing Strategies**

- Develop **co-branded marketing campaigns** with the UMW Athletic Department to promote key merchandise releases.
- Leverage **social media, game-day promotions, and email marketing** to drive engagement and sales.

**Game-Day & Event-Based Sales Opportunities**

- Operate pop-up retail locations at **athletic events, home games, and special tournaments**.
- Offer online pre-orders for championship or playoff merchandise to capture demand in real time.

**Online Store & E-Commerce Support**

- Ensure a seamless digital shopping experience with **easy navigation, secure checkout, and fast fulfillment**.
- Update online inventory regularly to reflect the latest UMW athletic gear.

Working closely with the **UMW Athletic Department and other university divisions**, UGS ensures that all Eagles fans, from students to alumni, have access to high-quality, well-branded athletic merchandise that reflects the spirit and pride of UMW athletics.

### 2. PLEASE DESCRIBE THE FIRM'S EXPERIENCE WITH NAME, IMAGE, AND LIKENESS (NIL) REGULATIONS AND INITIATIVES. THIS SHOULD INCLUDE SPECIFIC EXAMPLES OF HOW THEY HAVE SUPPORTED UNIVERSITY ATHLETIC DEPARTMENTS IN MANAGING NIL COMPLIANCE, OPPORTUNITIES, AND CHALLENGES. THE BIDDER SHOULD ALSO OUTLINE THEIR APPROACH TO ASSISTING UMW'S ATHLETIC DEPARTMENT IN OPTIMIZING NIL OPPORTUNITIES FOR STUDENT-ATHLETES, ENSURING COMPLIANCE WITH NCAA REGULATIONS, AND INTEGRATING NIL STRATEGIES INTO THE BROADER ATHLETIC AND ACADEMIC PROGRAMS.

UGS has experience navigating Name, Image, and Likeness (NIL) regulations and initiatives, working closely with university athletic departments to support compliance, maximize opportunities for student-athletes, and integrate NIL strategies into broader athletic and academic programs. Our approach ensures that universities can leverage NIL in a compliant, brand-aligned, and revenue-generating manner while providing student-athletes with valuable branding and monetization opportunities.

## UGS'S EXPERIENCE IN SUPPORTING NIL COMPLIANCE & OPPORTUNITIES

**NIL Compliance & Management Support**

- Work directly with university athletic departments to ensure NIL opportunities align with NCAA, conference, and institutional regulations.
- Provide guidance on contract structuring and compliance monitoring to protect student-athletes and the university.

**Retail NIL Merchandise & Sales**

- Develop and sell student-athlete branded merchandise, including apparel, accessories, and collectibles, in both physical and online stores.
- Ensure licensing compliance by coordinating with universities and third-party rights holders to create and distribute NIL-approved products.

**Strategic Partnerships for Athlete Brand Development**

- UGS partners with College Athletics Management (www.collegeathleticsmanagement.com) to help student-athletes build, manage, and promote personal websites, enhancing their NIL branding and marketability.
- Support student-athletes with customized e-commerce solutions, enabling them to sell merchandise while adhering to university and NCAA guidelines.

## HOW UGS WILL SUPPORT UMW'S ATHLETIC DEPARTMENT IN NIL OPTIMIZATION

**Integrated NIL Strategy & University Collaboration**

- Assist in developing a university-specific NIL framework that integrates into UMW's athletic, academic, and compliance structures.
- Work with coaches, compliance officers, and marketing teams to ensure NIL programs align with institutional values.

**In-Store & Online NIL Merchandise Sales**

- Feature NIL-branded student-athlete products in the UMW campus store and dedicated NIL sections online.
- Provide promotional support through UGS's marketing channels, social media, and game-day activations to maximize athlete earnings.

**Educational Support & Athlete Development**

- Offer workshops and training sessions on NIL best practices, branding, and financial literacy for student-athletes.
- Provide mentorship and guidance on leveraging NIL for long-term career success.

Combining retail expertise, NIL compliance knowledge, and innovative athlete branding solutions, UGS ensures that UMW student-athletes can capitalize on NIL opportunities effectively and ethically, all while enhancing the university's brand and fan engagement.

## 3. DESCRIBE HOW YOUR FIRM WOULD COLLABORATE WITH ATHLETICS TO EXECUTE TEAM FUNDRAISING INITIATIVES THROUGH ONLINE UMW ATHLETIC APPAREL SALES.

UGS is committed to working closely with **UMW Athletics** to execute **team fundraising initiatives** through online athletic apparel sales, providing **customized, team-specific merchandise** while ensuring accessibility, quality, and price sensitivity. Our approach leverages **print-on-demand technology**, curated product selections, and strategic marketing to maximize fundraising potential for each athletic program.

### HOW UGS SUPPORTS UMW ATHLETIC TEAM FUNDRAISING:

**Print-on-Demand Team Merchandise**

- UGS will launch **individual team-focused print-on-demand sites**, allowing each UMW sports team to have a **custom online storefront** featuring exclusive, sport-specific gear.
- The print-on-demand model eliminates upfront inventory costs, ensuring that teams can **generate revenue with every purchase** without financial risk.
- Each storefront will offer **a curated mix of apparel and accessories**, including T-shirts, hoodies, hats, and performance gear tailored to each team's identity.

**High-Quality, Price-Sensitive Selection**

- UGS will curate a collection of **premium, yet affordable** merchandise to cater to both budget-conscious students and alumni looking for high-end options.
- Offer **tiered pricing options**, from value-priced basics to premium branded athletic wear, ensuring wide appeal.
- Work with **reputable vendors and suppliers** to maintain quality while optimizing pricing for fundraising effectiveness.

**Collaborative Marketing & Sales Strategy**

- Coordinate with **UMW Athletics, coaches, and student-athletes** to promote fundraising campaigns through:
  - Social media campaigns with team and athlete endorsements.
  - Email marketing to alumni, parents, and fans.
  - In-game promotions and QR code activations at sporting events.
- Offer **limited-time flash sales, exclusive designs for major games, and championship merchandise** to drive engagement and urgency.

**Revenue Sharing & Fund Distribution**

- Implement **transparent revenue-sharing agreements** to ensure that a **portion of all sales directly supports the respective teams**.
- Provide **real-time sales tracking dashboards** for teams to monitor performance and earnings.
- Offer **custom fundraising events**, such as team-branded apparel pre-orders tied to milestones like playoffs or rivalry games.

Combining **digital innovation, strategic merchandising, and targeted marketing**, UGS will help **UMW Athletics maximize fundraising efforts**, strengthen team identity, and engage the broader university community in supporting Eagle athletics

# M. GRADUATION REGALIA:

**1. THE SALE OF CLASS RINGS, JEWELRY, ANNOUNCEMENTS AND ACADEMIC REGALIA SHALL BE SUBJECT TO THE TERMS AND CONDITIONS OF UMW'S SEPARATE AGREEMENTS. HOWEVER, THE CAMPUS STORE FIRM SHALL SUPPORT THE GRADUATION ACTIVITY AS REQUESTED. IN THE CASE OF A PHYSICAL GENERAL MERCHANDISE STORE, THIS SHALL INCLUDE THE SALE OF GRADUATION REGALIA BY THE CAMPUS STORE AND MAY INCLUDE ALLOWING THE SALE OF OTHER GRADUATION ITEMS IN THE CAMPUS STORE SPACE AND PROVIDING SALES AND STORAGE SPACE AS REQUESTED. RESPONSIBILITIES ALSO INCLUDE, BUT ARE NOT LIMITED TO ORGANIZING AND FACILITATING GRAD FAIR EVENTS, AND PROVIDING A SEAMLESS EXPERIENCE FOR GRADUATES.**

University Gear Shop acknowledges and agrees with this statement.

# N. MARKETING, ADVERTISING AND PROMOTIONS:

### 1. DETAIL THE MARKETING, ADVERTISING, AND PROMOTIONAL STRATEGIES YOU PLAN TO IMPLEMENT TO EFFECTIVELY REACH AND ENGAGE STUDENTS, FACULTY, STAFF, AND OTHER UNIVERSITY COMMUNITY MEMBERS. DESCRIBE HOW THESE STRATEGIES WILL BE TAILORED TO THE UNIQUE NEEDS AND INTERESTS OF THE UNIVERSITY CONSTITUENT. NOTE THAT UMW BROADCAST COMMUNICATIONS ARE NOT UTILIZED FOR MARKETING PURPOSES.

### AMBASSADOR MARKETING

Ambassador is well versed in marketing and engagement, proactively reaching out to students, faculty and staff, but also listening to your audiences to tailor outreach and build loyalty. We rely on insights and analytics that we collect and track to influence marketing initiatives. We assess which types of messages resonate most, which communication vehicles are preferred, and how and how often your students purchase materials.

Ambassador has a vested interest in the success of your course materials program, and we are committed to helping you market it in a way that fosters awareness, usage, and satisfaction. Ambassador will work with you on a marketing and communication strategy to your students and faculty that drives first and repeat customers. Messaging will be educational and engaging, articulating the benefits of and best practices for purchases, returns and buybacks.

### CUSTOMIZED MARKETING CAMPAIGNS INCLUDE:

- Direct student emails
- Email campaigns
- Social media
- Print marketing
- Sponsorships
- Community and campus outreach
- Athletic & student group involvement
- New student orientations
- Faculty training and webinars
- Student Ambassador Program


### STUDENT-FOCUSED MARKETING AND COMMUNICATION

We will create awareness and excitement surrounding your course materials program each term. We will include important dates, the use of Financial Aid and other voucher funds, format options, shipping promotions, and more.

### FACULTY-FOCUSED MARKETING AND COMMUNICATION

We will educate faculty on the benefits and support they will receive through the adoption process, and we will notify them of important dates and deadlines. We also will remind them of the student benefits of supporting school initiatives for course materials.

### OUTREACH CALENDAR

We will work with you to develop a marketing calendar for each enrollment term. Communication typically begins 4-6 weeks before term start. Subsequent emails are sent, with routine targeted follow-ups to students who have not yet purchased materials. Ambassador's flexible scheduling functionality allows you to determine the number of follow-ups. The calendar will also include notifications for buyback options and scheduled social media posts/promotional campaigns.

### UGS'S ON-CAMPUS STORE MARKETING

Our marketing team will create impactful content and campaigns specifically tailored for University of Mary Washington with insight provided by college departments and administration, intramural and athletic teams, alumni associations, and student clubs and organizations.

- Monthly newsletters
- Coordinated advertising efforts
- College news
- College TV/radio stations
- College Merch Squads
- Social media campaigns
- Participation in campus events
- Focused alumni campaigns
- Student ambassadors/influencers

As part of the UMW community, UGS is involved in student life, including New Student Move-in Day. We will invite every new student to show their school pride with a purchase from the UMW Gear Shop. A customized door hanger can be displayed at each dorm room on the day of freshman arrival displaying some of the latest UMW gear. This is just one way we get immersed into campus.

## PROMOTIONAL CALENDAR

UGS takes a detailed and collaborative approach to planning annual promotions. We begin with understanding the academic calendar and the expectations of the college. Planning for events usually begins months out from the actual event, particularly if there is unique merchandise associated with the event. Below is an example of our planning document:

## UNIVERSITY OF MARY WASHINGTON SAMPLE PROMOTIONS TRACKER

| Project | Event Date | Category | Estimated Start | Begin Planning Weeks Out | Estimated Finish | Date to Place Order for Merch | Estimated Duration (in days) |
|---|---|---|---|---|---|---|---|
| Spring BTS Promo | 1/10/2026 | Back to School | 1/10/2026 | 10 | 11/4/2025 | 11/18/2025 | 18 |
| Valentine's Day | 2/14/2026 | Promotion | 4/6/2026 | 8 | 12/13/2025 | 12/27/2025 | 6 |
| Spring Break | 3/5/26 - 3/13/26 | Promotion | 3/4/2026 | 8 | 1/3/2026 | 1/17/2026 | 4 |
| St. Patrick's Day | 3/17/2026 | Promotion | 3/17/2026 | 8 | 1/17/2026 | 1/31/2026 | 3 |
| End-of-Term Promo | 5/2/26 - 5/6/26 | Finals/Book Buyback | 6/26/2026 | 6 | 3/14/2026 | 3/28/2026 | 11 |
| Nurses Week | 5/6/26- 5/12/26 | Promotion | 5/12/2026 | 4 | 4/14/2026 | 4/28/2026 | 6 |
| Commencement | 5/13/26 - 5/14/26 | Graduation | 5/14/2026 | 4 | 4/13/2026 | 4/27/2026 | 1 |
| Mother's Day | 5/14/2026 | Promotion | 5/14/2026 | 4 | 4/8/2026 | 4/22/2026 | 1 |

After the promotion has been planned, we begin collaboration with all the necessary stakeholders. This approach ensures all interests are addressed and the promotion has support. Here are some of our annual promotions and examples:


- Spring Back-to-School
- Valentine's Day
- Spring Break
- St. Patrick's Day
- End of Term – Textbook Buyback
- Nurses Week
- Commencement
- Mother's Day
- Father's Day
- Summer Orientations
- Fall Back-to-School
- Item of the Month


All promotions are given a social media posting schedule. The schedule consists of a minimum of three postings per promotion, ensuring we capture all interested customers.

## 2. PROVIDE AN OVERVIEW OF THE TYPES OF EVENTS YOUR FIRM TYPICALLY ORGANIZES THROUGHOUT THE ACADEMIC YEAR. HIGHLIGHT HOW THESE EVENTS CONTRIBUTE TO THE CAMPUS COMMUNITY AND FOSTER ENGAGEMENT WITH THE CAMPUS STORE.

Please see the response to the prior inquiry.

## 3. DISCUSS THE METHODS YOU WILL USE TO ENHANCE THE CAMPUS STORE'S VISIBILITY AND ENSURE IT BECOMES AN INTEGRAL PART OF CAMPUS LIFE. INCLUDE PLANS FOR COLLABORATION WITH VARIOUS CAMPUS ENTITIES AND PARTICIPATION IN CAMPUS ACTIVITIES.

UGS is committed to making the University of Mary Washington (UMW) campus store a highly visible and integral part of campus life by implementing strategic marketing, collaborations, and event-driven engagement. Our approach ensures that the store is more than just a retail space—it becomes a hub for school spirit, community connection, and student engagement.

### METHODS TO ENHANCE CAMPUS STORE VISIBILITY & INTEGRATION:

**Strategic Marketing & Digital Engagement**

- Social Media & Digital Promotions: Leverage university-wide social media channels, student influencers, and digital advertising to promote special promotions, new arrivals, and exclusive merchandise.
- Email & Text Campaigns: Regularly update students, faculty, and alumni with exclusive deals, seasonal collections, and limited-time releases.
- Campus Store Website & Mobile App Integration: Ensure an easy-to-navigate online platform for purchases, event registrations, and promotional announcements.

**Campus-Wide Collaborations**

- Partnerships with Student Organizations & Athletics: Work with student clubs, athletic teams, and Greek life to offer custom merchandise and co-branded apparel.
- Faculty & Academic Department Collaboration: Feature books by UMW faculty, offer academic-themed merchandise, and host book signings and speaker events.
- Residence Life & New Student Orientation: Provide welcome packages, exclusive freshman gear, and orientation-week promotions to create an early connection with students.

**Participation in Campus Events & Activities**

- Homecoming & Spirit Weeks: Set up pop-up shops at major university events, offering exclusive themed merchandise.
- Move-In & Family Weekends: Host sales, giveaways, and special promotions to engage students and their families.
- Graduation & Alumni Events: Provide alumni-focused apparel, diploma frames, and commemorative items for key milestone moments.

**Pop-Up & Mobile Retail Initiatives**

- Deploy pop-up stores at high-traffic campus locations, such as dining halls, athletic events, and student centers, ensuring accessibility and visibility.
- Operate a branded merchandise venues at sporting events, concerts, and community gatherings to expand reach beyond the physical store.

This multi-faceted approach to marketing, engagement, and collaboration, ensures that the UMW campus store is deeply embedded in university life, enhancing school spirit while providing a seamless retail experience for students, faculty, staff, and alumni.

## 4. DETAIL HOW YOU PLAN TO PARTNER WITH UNIVERSITY ATHLETICS, ALUMNI ASSOCIATION, STUDENT GOVERNMENT ASSOCIATION, ADMISSIONS, AND OTHER CAMPUS ORGANIZATIONS TO ENSURE THE CAMPUS STORE HAS A PRESENCE AT UNIVERSITY EVENTS AND EFFECTIVELY MARKETS ITS MERCHANDISE.

UGS is dedicated to establishing strong partnerships with University Athletics, the Alumni Association, the Student Government Association (SGA), Admissions, and other campus organizations to ensure that the campus store remains a highly visible and integral part of university events. By offering strategic marketing, event-based engagement, promotional products, and print-on-demand services, UGS will help these organizations effectively promote school spirit and enhance their outreach efforts.

### STRATEGIC PARTNERSHIPS & ENGAGEMENT INITIATIVES

**University Athletics Partnership**

- Game-Day Retail Presence:
    - Operate pop-up stores and mobile retail units at sporting events, tailgates, and championship celebrations.
    - Provide limited-edition gear and championship merchandise with rapid turnaround through our hot market experience, as seen with Oakland University's and Abilene Christian University's conference wins in 2024.
- Custom Print-on-Demand Team Stores:
    - Offer online storefronts where each athletic team can sell branded apparel and fundraising merchandise.
    - Utilize a print-on-demand model to allow low-risk, high-reward sales for teams without requiring inventory commitments.
- NIL Support & Merchandise:
    - Provide NIL-focused merchandise for student-athletes, ensuring compliance and seamless integration with NCAA regulations.
    - Collaborate with College Athletics Management to build and manage student-athlete websites for brand promotion.

**Alumni Association Collaboration**

- Exclusive Alumni Merchandise & Fundraising Products:
    - Develop an alumni-branded product line featuring class-year apparel, milestone anniversary gifts, and homecoming collectibles.
    - Provide print-on-demand options for reunion and alumni chapter-specific gear without inventory constraints.
- Event Sponsorship & On-Site Sales:
    - Participate in homecoming, alumni weekends, and donor events with dedicated retail booths.
    - Offer VIP and loyalty promotions for alumni returning to campus.

**Student Government Association (SGA) & Student Organizations**

- Co-Branded Merchandise & Promotional Products:
    - Partner with SGA and student clubs to design and sell organization-specific apparel and accessories.
    - Offer customized print-on-demand stores for student-run initiatives, eliminating upfront costs for organizations.
- Campus Event Retail Presence:
    - Ensure the store is represented at major student-led events, including spirit weeks, club fairs, and cultural celebrations.
    - Provide exclusive discounts and promotions for students attending SGA-sponsored activities.

**Admissions & New Student Engagement**

- Orientation & Campus Tours:
  - Create exclusive "Welcome to UMW" merchandise packs for incoming students.
  - Provide admissions teams with branded giveaways such as lanyards, water bottles, and T-shirts for prospective students.
- Recruitment & Yield Events:
  - Set up merchandise tables at admitted student days, ensuring that prospective students and families can purchase UMW gear before their arrival.
  - Offer online store discount codes to new students to encourage early engagement.

## PROMOTIONAL PRODUCT CAPABILITIES & PRINT-ON-DEMAND SERVICES

**UGS has the capability to provide:**

- Custom-branded promotional products for athletic teams, alumni groups, student organizations, and admissions.
- Print-on-demand solutions for athletics, alumni, and student organizations, allowing for cost-effective merchandising.
- Flexible online and in-store order fulfillment, ensuring all groups have access to custom apparel, accessories, and event merchandise.

By integrating these partnerships, marketing strategies, and flexible merchandising options, UGS will ensure that the campus store remains a central part of UMW's university life while providing high-quality, customized merchandise to students, alumni, and faculty.

## 5. SHARE SPECIFIC STRATEGIES DESIGNED TO ATTRACT STUDENTS, FAMILIES AND ALUMNI ON YOUR WEBSITE AND/OR PHYSICAL STORE LOCATIONS. EMPHASIZE HOW THESE STRATEGIES WILL ENHANCE THE SHOPPING EXPERIENCE AND MEET THE NEEDS OF THE UNIVERSITY COMMUNITY.

UGS is committed to implementing targeted strategies that attract students, families, and alumni to both the campus store and online platforms, ensuring an engaging and seamless shopping experience. Our approach focuses on personalized marketing, event-driven promotions, and exclusive product offerings to enhance school spirit and meet the diverse needs of the university community.

## STRATEGIES TO ATTRACT STUDENTS, FAMILIES, AND ALUMNI

**Engaging Online Shopping Experience**

- Personalized Website Experience:
  - AI-driven recommendations based on browsing history, seasonality, and trending items.
  - Custom sections for students, parents, and alumni to highlight relevant merchandise.
- Exclusive Online-Only Merchandise:
  - Special edition apparel, alumni anniversary collections, and pre-order event merchandise.

**Event-Driven Promotions & Campus Engagement**

- Welcome & Move-In Weekend Specials:
  - Offer "Essentials Bundles" with school supplies, apparel, and dorm accessories for incoming students.
  - Exclusive family discount days to encourage parents to shop during move-in.
- Game-Day and Spirit Week Events:
  - Limited-time game-day pop-up shops at athletic venues with exclusive merchandise.

    - "Wear the Colors" promotions where students wearing UMW gear receive in-store discounts.
- Homecoming & Alumni Weekend Specials:
    - Offer alumni-exclusive merchandise, including vintage logos and class-year apparel.
    - Personalized name-engraved gifts and diploma frames for graduates and returning alumni.

Leveraging these strategic marketing, engagement, and retail experience innovations, UGS will create a dynamic and customer-centric shopping environment—both online and in-store—that strengthens the connection between students, families, alumni, and the university brand.

### 6. POP UP EVENTS: FIRM SHOULD BE PREPARED TO HAVE A PRESENCE AT POP UP EVENTS IDENTIFIED BY UNIVERSITY TO PROMOTE THE UNIVERSITY'S MISSION AND TO SUPPORT SPECIFIED EVENTS.

University Gear Shop acknowledges and agrees with this statement.

### A. POP-UP LOCATIONS SHOULD ALSO BE INCLUDED IN THE FIRM'S RETAIL STRATEGY FOR ADMISSIONS, ALUMNI AND ATHLETIC EVENTS.

University Gear Shop acknowledges and agrees with this statement. Please see responses included in this section of the proposal.

### 7. PLEASE DESCRIBE YOUR FIRM'S ABILITY TO PROVIDE STUDENTS, FAMILIES AND VISITORS AN ONLINE, ON DEMAND RETAIL OFFERING FOR UMW ATHLETICS.

UGS is fully equipped to provide **students, families, and visitors** with a **comprehensive, on-demand online retail platform** for **UMW Athletics merchandise**, ensuring accessibility, convenience, and a seamless shopping experience. Our platform is designed to offer **custom, sport-specific, and NIL-branded merchandise** while maintaining alignment with **UMW's branding and athletic department guidelines**.

### UGS'S ONLINE, ON-DEMAND RETAIL CAPABILITIES FOR UMW ATHLETICS

**Dedicated Online Store for UMW Athletics**

- A **UMW Athletics-branded e-commerce site** featuring:
    - Sport-specific collections for all teams, ensuring every sport is represented year-round.
    - On-demand printing capabilities for personalized and championship merchandise.
    - Seamless mobile-friendly navigation for easy browsing and checkout.
- **Real-time inventory updates** and pre-order options for high-demand releases.

**Print-on-Demand & Custom Merchandise**

- **No inventory risks**: Print-on-demand technology ensures **low upfront costs** while allowing customers to purchase custom gear instantly.
- **Customizable fan gear**: Personalized jerseys, name & number printing, and limited-edition designs.
- **NIL Athlete Merchandising**: Student-athletes can sell **their own NIL-branded apparel** while ensuring NCAA compliance through our partnership with **College Athletics Management**.

**Seamless Ordering & Fulfillment for Families & Visitors**

- **Nationwide & International Shipping**: Parents and alumni can purchase merchandise from anywhere, ensuring easy access to UMW Athletics gear.

- **Buy Online, Pick Up In-Store**: Allows local customers to **reserve products** for convenient in-store pickup.
- **Group & Bulk Ordering Options**: Perfect for alumni reunions, student organizations, or family gatherings.

**Event-Specific & Hot Market Merchandise**

- **Championship & Game-Day Gear**: Rapid turnaround for **special event merchandise**, as demonstrated with Oakland University's and Abilene Christian University's **hot market experiences**.
- **Limited-Edition Drops**: Special apparel releases for **rivalry games, homecoming, and playoffs**.
- **Exclusive Alumni & Legacy Collections**: Vintage-inspired athletic gear celebrating **historical moments in UMW sports**.

Offering a **flexible, high-quality, and user-friendly online shopping experience**, UGS ensures that **students, families, and visitors** can easily access and purchase **UMW Athletics merchandise** anytime, anywhere.

# O. FACILITIES AND EQUIPMENT:

**1. THE UNIVERSITY ENVISIONS A PHYSICAL CAMPUS STORE NOT ONLY AS A RETAIL SPACE BUT AS A VIBRANT DESTINATION AND CENTRAL HUB OF ACTIVITY FOR STUDENTS, FACULTY, STAFF, PROSPECTIVE STUDENTS AND THEIR FAMILIES AND THE BROADER COMMUNITY. PROPOSERS ARE ENCOURAGED TO CREATIVELY CONSIDER THE USE AND CONFIGURATION OF THE AVAILABLE SPACE TO MAXIMIZE ITS LOCATION, MAKING IT AN INVITING AND DYNAMIC AREA FOR ALL.**

We believe that the exterior and interior store design sets the tone for the shopping experience. We offer a modern, sleek, well-organized design and layout that optimizes the university brand on walls, fixture signage and even on the floor. Our racks, shelves and displays will be arranged to create visual interest and traffic patterns that optimize the products and create an inviting atmosphere.

Lighting, music, and consistent overall store maintenance create a pleasant environment that makes customers want to return. UGS understands that we aren't just selling a product – we're creating an experience.

Our design lends itself to assuring the University of Mary Washington brand is prominently displayed throughout the gear shop. We give dedicated attention to the logo and all image standards when designing the space. It is important to UGS that upon entry to the gear shop, there is no doubt where you are. The University of Mary Washington brand will be strategically and boldly displayed throughout the gear shop. Eagle pride will be apparent in your gear shop and be displayed in a way that will make you and your student body proud.

UGS adheres to all Americans with Disabilities Act (ADA) requirements to ensure that the gear shop is accessible to all who wish to enter, browse, and purchase from the store.


As a modern-day campus store solution, UGS looks to be innovative and to never accept the status quo. Therefore, we have included a video to better communicate a proposed facility plan that will provide St. Louis University with a state-of-the-art Gear Shop facility. We believe this form of communication will reflect a state-of-the-art Gear Shop that will improve customer satisfaction and reflect a retail-of-the future facility.

Video: https://vimeo.com/778200766?share=copy

**2. RENOVATION PLAN AND BUDGET: IF PROPOSING A PHYSICAL STORE, INCLUDE RECOMMENDATIONS AND COST FOR A REFRESH. PROPOSALS SHOULD REFLECT A REDUCED RETAIL SPACE, PROVIDING ROOM FOR COMPLEMENTARY STUDENT SERVICES. PROPOSERS SHOULD PRESENT A DETAILED PLAN AND BUDGET FOR RENOVATING OR UPDATING THE CAMPUS STORE THROUGHOUT THE CONTRACT DURATION. INCLUDE A TIMELINE FOR RENOVATIONS TO ENSURE THE CAMPUS STORE REMAINS CONTEMPORARY AND WELL-MAINTAINED, AVOIDING ANY DATED APPEARANCE.**

Should UGS be selected for a presentation, physical store recommendations and renovation/remodel suggestions will be presented.

**3. THE FIRM SHALL BE RESPONSIBLE FOR THE PROPER COLLECTION AND REMOVAL/DISPOSAL OF ALL TRASH, GARBAGE, SHIPPING CONTAINERS, BOXES, SKIDS, ETC., FROM THE INTERIOR OF THE CAMPUS STORE FACILITY AND DEPOSITED IN THE APPROPRIATE DISPOSAL CONTAINER, E.G. TRASH/GARBAGE IN DUMPSTERS, CARDBOARD FLATTENED AND DEPOSITED IN CARDBOARD RECYCLING CONTAINERS, ETC.**

University Gear Shop acknowledges and agrees with this statement.

**4. FLOOR MAINTENANCE: THE FIRM SHALL BE RESPONSIBLE FOR CLEANING ALL FLOORING AT LEAST BI-ANNUALLY, ENSURING FLOORS WHERE APPLICABLE HAVE AN ATTRACTIVE WAXED FINISH. CARPETS MUST ALSO BE CLEAN AND IN GOOD REPAIR.**

University Gear Shop acknowledges and agrees with this statement.

**5. CLEANLINESS OF SURFACES: WALLS, CEILINGS, WINDOWS, AND VENTS SHALL BE KEPT CLEAN, FREE OF DIRT, DUST, AND GREASE. DISPLAY AND ENTRANCE WINDOWS AND DOORS SHALL BE CLEANED BY THE FIRM.**

University Gear Shop acknowledges and agrees with this statement.

**6. COMPREHENSIVE CLEANING SCHEDULE: THE FIRM SHALL PERFORM THOROUGH CLEANING OF ALL FACILITIES AT THE END OF EACH SEMESTER, INCLUDING THE SUMMER, AND DURING UNIVERSITY SCHEDULED BREAKS. THIS INCLUDES WALLS, FIXTURES, FURNITURE, HALLWAYS, STAIRS, THE RECEIVING DOCK, OFFICES, RUGS, STORAGE ROOMS, AND EQUIPMENT.**

University Gear Shop acknowledges and agrees with this statement.

**7. LOADING DOCK: THE LOADING DOCK AREA SHALL BE MAINTAINED CLEAN AND FREE FROM DEBRIS AT ALL TIMES.**

University Gear Shop acknowledges and agrees with this statement.

# P. FINANCIALS:

**1. FINANCIAL TERMS**

**A. SALES AND COMMISSION PAYMENT STRUCTURE: FIRM SHALL PRESENT A DETAILED SALES AND COMMISSION PAYMENT TIER MATRIX APPLICABLE THROUGHOUT THE CONTRACT, INCLUDING ANY RENEWALS OR EXTENSIONS, TO OUTLINE THE BASIS FOR COMMISSION PAYMENTS. MATRIX MUST INCLUDE, AT MINIMUM, SALES CATEGORY, SALES VOLUME PER CATEGORY AND/OR IN TOTAL, % COMMISSION AND TOTAL COMMISSION PER CATEGORY.**

Ambassador recognizes that every client has unique financial objectives that may change depending on their circumstances, therefore, you can set your own commission rate on the following items:

- **New Textbooks/Printed Access Codes**
- **Used Textbooks**
- **Rental Textbooks**
- **Coursepacks/PODs**
- **Custom eBooks and other digital items**
- **National Title eBooks**
- **Inclusive Access and Equitable Access**
- **All Non-Book Sales**

Due to Ambassador's unique pricing model, you have the flexibility to determine the level of **commission** you would like to earn (with some schools choosing **15% or more**). This model allows for potential adjustments and increased earnings based on your preferred approach and pricing strategy. Alternatively, you can choose to receive no revenue share, which would provide students with even lower textbook pricing.

On marketplace sales, Ambassador will provide **25%** of the commission received from marketplace as a revenue share. Ambassador will provide a **4%** commission on used book buybacks made through the Online Bookstore.

## AMBASSADOR'S ADDITIONAL FINANCIAL INCENTIVES:

In addition to the revenue share, Ambassador is pleased to offer the following incentives:

- **Partnership Bonus: $50,000** to be used/allocated as determined by your institution
- **Textbook Scholarships:** up to **$15,000**
- **per academic year** to be allocated as determined by your institution
- **Marketing Funds:** up to **$10,000 per academic year** to be spent on initiatives, giveaways, and promotions
- **Free Shipping:** Free economy shipping on applicable orders over $69.00
- **No Charge for our Course Materials Platform, RODA:** Ambassador's Course Materials Platform, RODA, is available to your school at no additional fee
- **No Implementation/Integration/Training Fees:** Ambassador will not charge any implementation, integration, or training fees
- **Tablet Kiosk:** Ambassador will provide a tablet kiosk to be placed at an on-campus location to assist students in ordering course materials

## AMBASSADOR 5-YEAR COURSE MATERIALS PROJECTION

| SALES PROJECTIONS ($) | | | | | |
|---|---|---|---|---|---|
| **CONTRACTOR - AMBASSADOR** | | | | | |
| | **YEAR 1** | **YEAR 2** | **YEAR 3** | **YEAR 4** | **YEAR 5** |
| **Department** | | | | | |
| New Textbook Sales | $ 169,550 | $ 178,027 | $ 186,928 | $ 192,536 | $ 198,312 |
| Used Textbook Sales | $ 71,024 | $ 74,575 | $ 78,304 | $ 80,653 | $ 83,072 |
| Digital Textbook Sales | $ 540,180 | $ 567,189 | $ 595,549 | $ 613,415 | $ 631,818 |
| Textbook Rental Sales | $ 257,616 | $ 270,496 | $ 284,021 | $ 292,542 | $ 301,318 |
| **Total Course Material Sales** | **$ 1,038,369** | **$ 1,090,288** | **$ 1,144,802** | **$ 1,179,146** | **$ 1,214,520** |

## UGS 5-YEAR GENERAL MERCHANDISE PROJECTION

| SALES PROJECTIONS ($) | | | | | |
|---|---|---|---|---|---|
| **CONTRACTOR - UGS** | | | | | |
| | **YEAR 1** | **YEAR 2** | **YEAR 3** | **YEAR 4** | **YEAR 5** |
| **Department** | | | | | |
| Convenience | $ 26,216 | $ 27,408 | $ 28,600 | $ 29,791 | $ 30,983 |
| Computer Products | $ 29,769 | $ 31,122 | $ 32,476 | $ 33,829 | $ 35,182 |
| Emblematic Clothing & Gift | $ 372,663 | $ 409,929 | $ 428,562 | $ 465,829 | $ 484,462 |
| Other | $ 134,709 | $ 140,832 | $ 146,956 | $ 153,079 | $ 159,202 |
| School Supplies | $ 66,134 | $ 69,140 | $ 72,146 | $ 75,153 | $ 78,159 |
| **Total General Merchandise Sales** | **$ 629,491** | **$ 678,431** | **$ 708,740** | **$ 757,681** | **$ 787,988** |

## UGS FINANCIAL PROPOSAL

University Gear Shop will pay the University of Mary Washington a commission fee for each Operating Year in an aggregate amount based on percentages of gross revenue.

| TOTAL GROSS REVENUE | COMMISSION FEE |
|---|---|
| $1 up to and including $600,000.00 | 6% of net revenue dollars for in-store and University of Mary Washington Gear Shop website purchases |
| $600,000.00 up to and including $700,000.00 | 7% of net revenue dollars for in-store and University of Mary Washington Gear Shop website purchases |

| | |
|---|---|
| $700,000.00 up to and including $800,000.00 | 8% of net revenue dollars for in-store and University of Mary Washington Gear Shop website purchases |
| In excess of $800,000.00 | 10% of net revenue dollars for in-store and University of Mary Washington Gear Shop website purchases |

University Gear Shop will provide an **annual commission guarantee of $20,000.00**, should the fee structure above produce less than $20,000.00 in annual commission.

University Gear Shop will provide University of Mary Washington with **$25,000.00 in scholarships** to be used at their discretion. The scholarships will be paid in increments of $5,000.00 annually over the five-year agreement.

University Gear Shop will also provide up to **$60,000.00 in facility improvements**.

For all Direct-2-U purchases from UGS, UGS shall provide the University of Mary Washington with a discount of 10% on the price of the items. Given this discount, UGS will not pay the University of Mary Washington a commission on these items.

UGS will keep complete and accurate records of all University of Mary Washington Gear Shop and online sales in accordance with industry accounting practices and will provide a statement of gross revenue to University of Mary Washington monthly for the preceding period. UGS will preserve records of store operations for three (3) years from transaction date, and will make them available for review, audit, and verification by University of Mary Washington upon request and provision of reasonable advanced notice during ordinary business hours other than during store "rush" periods.

**Referral Fee**
University Gear Shop agrees to pay University of Mary Washington a **referral fee of $2,500.00** in the event University of Mary Washington refers a college or university to UGS and UGS enters into an agreement with such institution to deliver services like those provided to University of Mary Washington. The referral fee will be a one-time payment and will be paid upon the one-year anniversary of the agreement signed with the referred institution.

**B. PAYMENT SCHEDULE: THE AGREED-UPON SALES AND COMMISSION PAYMENT TIER SCHEDULE SHALL SERVE AS THE STANDARD METHODOLOGY FOR CALCULATING AND EXECUTING TIMELY COMMISSION PAYMENTS TO THE UNIVERSITY.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**C. REPORTING AND PAYMENT DEADLINES: ALL FINANCIAL AND SALES REPORTS, ALONGSIDE CORRESPONDING COMMISSION PAYMENTS, SHALL BE SUBMITTED BY THE 10TH DAY OF THE MONTH FOLLOWING THE REPORTING PERIOD. IN CASES OF LATE SUBMISSION, THE UNIVERSITY RESERVES THE RIGHT TO IMPOSE A LATE FEE UP TO $100 PER DAY. IF THE DUE DATE FALLS ON A WEEKEND OR PUBLIC HOLIDAY, THE DEADLINE EXTENDS TO THE NEXT BUSINESS DAY. FINANCIAL AND SALES REPORTS SUBMITTED SHALL BE FINAL AND NOT PRELIMINARY OR ESTIMATED.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**D. FISCAL YEAR DEFINITION: THE UNIVERSITY'S FISCAL YEAR IS DEFINED FROM JULY 1 TO JUNE 30, WITH FINANCIAL REPORTING CONDUCTED ON A MONTHLY BASIS. ANY**

**CONTRACT PERIOD BEGINNING BEFORE THE START OF A FULL FISCAL YEAR SHALL BE ADJUSTED ON A PRORATED BASIS.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**E. FISCAL REPORTING ALIGNMENT: THE FIRM'S FISCAL REPORTING PERIOD SHALL ALIGN WITH THE UNIVERSITY'S FISCAL YEAR. MONTHLY REPORTING SHALL COVER DATA FROM THE FIRST TO THE LAST DAY OF EACH CALENDAR MONTH.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**F. TAX OBLIGATIONS: THE FIRM IS SOLELY RESPONSIBLE FOR ALL TAX OBLIGATIONS RELATED TO THIS CONTRACT.**

University Gear Shop acknowledges and agrees with this statement.
Ambassador acknowledges and agrees to this statement with the understanding that this applies to UMW and Ambassador tax obligations, and Ambassador will not be held accountable for sales tax for students.

**G. SALES AND TAX REPORTS: UPON REQUEST, THE FIRM MUST PROVIDE COPIES OF ALL REQUIRED SALES AND TAX REPORTS THAT DETAIL SALES, REVENUES, AND TAXES GENERATED AT THE UNIVERSITY.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**H. OPERATING COSTS: THE FIRM SHALL PAY ALL OPERATING COSTS FOR PROVIDING THE CONTRACTED**
**GOODS/SERVICES, EXCEPT FOR SPECIFIC COSTS OUTLINED BY THE UNIVERSITY (UNIVERSITY'S RESPONSIBILITIES) IN THE RFP OR THE NEGOTIATED CONTRACT.**

> **I. THE UNIVERSITY'S RESPONSIBILITIES CONSIST OF:**
> **A. ELECTRICITY**
> **B. GENERAL BUILDING MAINTENANCE (HVAC, MECHANICAL, CEILING TILES FROM LEAKS, ETC.)**
> **C. HEATING AND AIR CONDITIONING**
> **D. SMOKE/HEAT ALARMS**
> **E. NATURAL GAS, STEAM**
> **F. WATER, SEWER**
> **G. TRASH REMOVAL (FROM THE UNIVERSITY'S DESIGNATED POINT)**
> **H. FIRE SAFETY INSPECTIONS**
> **I. UTILITY SERVICES: THE UNIVERSITY COMMITS TO MAINTAINING UTILITIES TO ITS BEST ABILITY BUT SHALL NOT BE LIABLE FOR LOSSES DUE TO OUTAGES.**

As this pertains to the on-campus store, University Gear Shop acknowledges and agrees with this statement.

**2. SALES, REPORTING AND COMMISSION TERMS**

**A. NET SALES REPORTING: ALL NET SALES (GROSS SALES MINUS TAXES), INCLUDING BUT NOT LIMITED TO CASH, CHECK, INTERNAL TRANSFERS, GIFT CARD REDEMPTION AND DEBIT/CREDIT CARD, AND FINANCIAL AID SHALL BE RECORDED AS REVENUES ON FINANCIAL REPORTS AT RETAIL VALUES.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**B. COMMISSION COMPUTATION: COMMISSIONS SHALL BE COMPUTED ON NET SALES.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**C. COMMISSION PAYMENTS: COMMISSIONS SHALL BE PAID TO THE UNIVERSITY IN THE PERIOD THEY WERE EARNED AND CHARGED, AND NOT UPON COLLECTION DATE. THE FIRM SHALL NOT BE REIMBURSED FOR COMMISSIONS PAID ON UNCOLLECTED AMOUNTS. UNCOLLECTABLE AMOUNTS SHALL BE THE RESPONSIBILITY OF THE FIRM.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**D. COMMISSION PAYMENTS SHALL BE ACCOMPANIED BY SALES REPORTS SHOWING NET SALES FOR EACH CATEGORY, TOTAL SALES, PERIOD IN WHICH SALES WERE MADE, AND COMMISSION CALCULATION.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**E. MONTHLY FINANCIAL REPORTING: THE FIRM SHALL E-MAIL A MONTHLY FINANCIAL OPERATING STATEMENT REPORT (OPERATING STATEMENT) IN SPREADSHEET FORMAT TO THE UNIVERSITY BY THE 10TH OF EACH CALENDAR MONTH. PROPOSAL MUST INCLUDE A SAMPLE PROFIT AND LOSS STATEMENT THAT WOULD BE PROVIDED TO THE CONTRACT ADMINISTRATOR.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**F. ANY OPERATING STATEMENTS REQUIRING ADJUSTMENTS BECAUSE OF A REVIEW AUDIT SHALL BE REFLECTED ON THE NEXT REPORTING MONTH.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**G. AT THE END OF EACH SEMESTER OR TERM, OR UPON REQUEST OF THE UMW CONTRACT ADMINISTRATOR, CONTRACTOR SHALL PROVIDE:**

> **I. AVERAGE PRICING FOR EACH AVAILABLE COURSE MATERIALS FORMAT**

Ambassador acknowledges and agrees with this statement.

> **II. A CURRENT TERM COURSE MATERIALS LIST THAT INCLUDES THE RETAIL PRICE FOR EACH TITLE IN EACH OF ITS AVAILABLE FORMATS.**

Ambassador acknowledges and agrees with this statement.

**H. CONTRACTOR SHALL PROVIDE INSIGHTS REPORTS ANNUALLY TO THE CONTRACT ADMINISTRATOR.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**I. AUDIT REPORTING: THE UNIVERSITY SHOULD BE INFORMED BY THE FIRM OF THE SCHEDULE OF THE FIRM'S OF THE RECORDS AND OPERATIONS AT THE UNIVERSITY. THE UNIVERSITY WILL HAVE THE OPTION TO PARTICIPATE IN THE FIRM'S AUDITS AND SHALL RECEIVE A FULL AUDIT REPORT OF FINDINGS REGARDLESS OF THE UNIVERSITY PARTICIPATION.**

University Gear Shop acknowledges and agrees with this statement.

Ambassador acknowledges and agrees with this statement with the understanding that is campus store-related financials only.

**J. CONFIDENTIALITY AND COMPLIANCE: ALL FIRM FINANCIAL REPORTS AND THEIR CONTENT WILL BE RETAINED, USED AND TREATED IN STRICT CONFIDENCE BY THE UNIVERSITY EXCEPT AS REQUIRED BY THE VIRGINIA FREEDOM OF INFORMATION ACT.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**3. THE FIRM SHALL SUBMIT ALL REPORTS AND PAYMENTS TO:**

**A. REPORTS**

**I. ELECTRONIC REPORTING SUBMISSION ADDRESSES WILL BE DETERMINED UPON CONTRACT AWARD.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

**B. PAYMENTS**

**I. ELECTRONIC PAYMENT SUBMISSION WILL BE PROVIDED UPON CONTRACT AWARD. ELECTRONIC PAYMENTS MUST BE ACCOMPANIED BY SUPPORTING DOCUMENTATION THAT DEFINES THE SALES BY CATEGORY, SALES PERIOD, TOTAL SALES AND CALCULATION OF FUNDS EARNED.**

Ambassador and University Gear Shop acknowledge and agree with this statement.

# Q. RENOVATION AND CONSTRUCTION:

**1. COORDINATION WITH UNIVERSITY FACILITIES: THE FIRM SHALL COORDINATE WITH THE UNIVERSITY'S FACILITIES MANAGEMENT, THROUGH BUSINESS SERVICES, FOR SUPPORT RELATED TO ELECTRICAL WORK, CONSTRUCTION, LIGHTING, PLUMBING, AND THE INSTALLATION OF FURNITURE/FIXTURES, FINISHES, INSPECTIONS, AND SIGNAGE FOR ANY PROPOSED CHANGES TO THE RETAIL SPACE.**

University Gear Shop acknowledges and agrees with this statement.

**2. DESIGN AND CONSTRUCTION CAPABILITIES: STATE WHETHER THE FIRM IS CAPABLE OF FACILITATING THE DESIGN, RENOVATION, AND/OR CONSTRUCTION PROCESSES UPON REQUEST AND POSSESS IN-HOUSE RESOURCES TO FULFILL THESE NEEDS THROUGHOUT THE CONTRACT TERM.**

University Gear Shop has a Design Firm and Architecture Firm contracted for design facilitation. Ultimately, UGS would like to partner with a university approved contractor.

**3. REGULATORY COMPLIANCE: THE FIRM SHALL ONLY UTILIZE FIRMS REGISTERED WITH THE DEPARTMENT OF PROFESSIONAL AND OCCUPATIONAL REGULATION (WWW.DPOR.VIRGINIA.GOV/).**

University Gear Shop acknowledges and agrees with this statement.

# R. CONTRACT TRANSITION:

**THE UNIVERSITY CURRENTLY HAS A CONTRACT IN PLACE FOR ITS CAMPUS STORE MANAGEMENT. THIS CONTRACT WITH BARNES & NOBLE WILL EXPIRE ON JUNE 30, 2026. IN THE EVENT OF A NEW VENDOR BEING SELECTED AS THE CAMPUS STORE VENDOR, IT WILL**

**BE EXPECTED THAT THE TWO PARTIES WORK COLLABORATIVELY ON A POSSIBLE EARLY TRANSITION.**

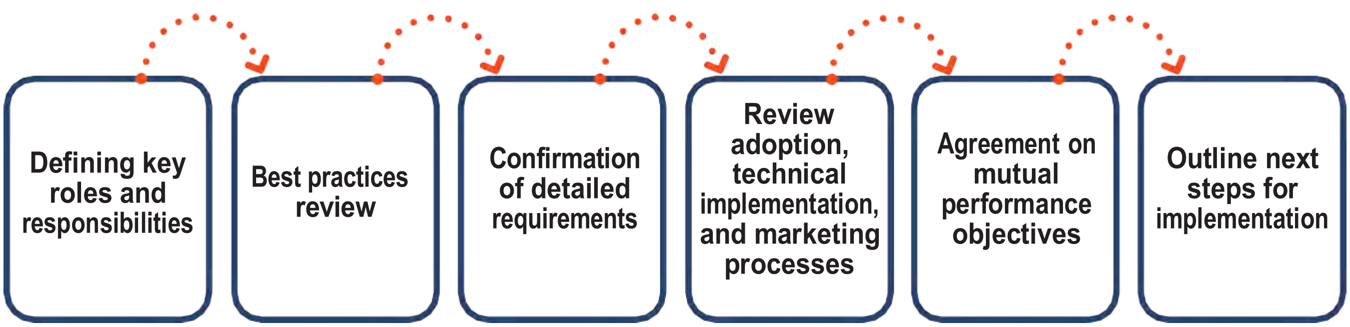
As this pertains to the on-campus store, University Gear Shop acknowledges and agrees with this statement.

**1. PROVIDE A REALISTIC IMPLEMENTATION AND TRANSITION PLAN. THE SCHEDULE SHOULD INCLUDE TARGET DATES FOR STAFFING, STOCKING, EQUIPPING, ALL SPECIFIC ROLES AND RESPONSIBILITIES REQUIRED FOR THE TRANSITION AND MERCHANDISING THE RETAIL FACILITIES, AND A DETAILED PROJECT PLAN FOR NECESSARY IT INTEGRATIONS. IN ADDITION, PROVIDE DATES FOR KEY TRANSITION ACTIVITIES SUCH AS STAFF TRAINING, SYSTEM INSTALLATION, BANKING ARRANGEMENTS, SERVICE AGREEMENTS, PHONE INSTALLATIONS, ETC.**

## AMBASSADOR'S SUCCESSFUL TRANSITION AND IMPLEMENTATION

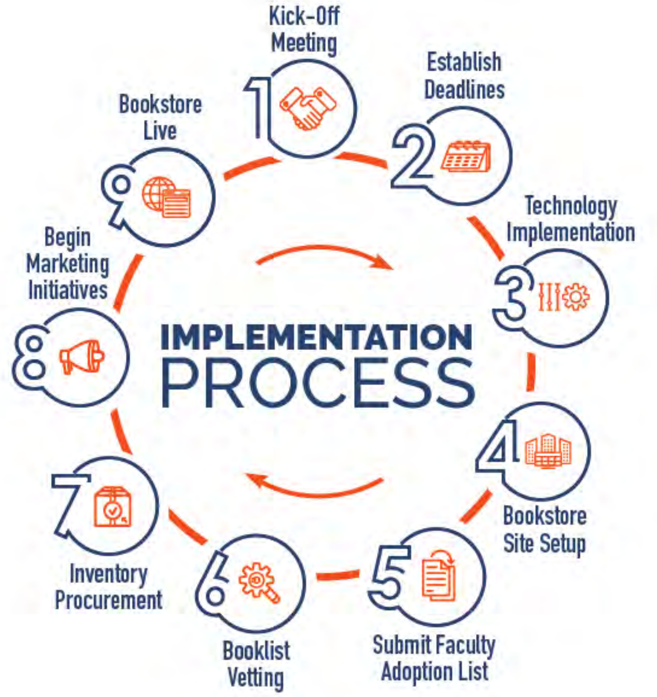
Transitioning to Ambassador is seamless. Ambassador manages the entire process and will strive to meet your required timeline. Upon contract award, Ambassador will schedule a kick-off meeting where we will walk through the on-boarding process and get input on the following high-level items. **Please see Ambassador's high-level timeline in Attachment 1**.

> *"Ambassador made the process of switching providers seamless, delivering a straightforward, guided and comprehensive transition. Ambassador's solutions and technologies have elevated our course materials program to the next level, streamlining our operations, helping our financial oversight, and easing course materials acquisition for our students."*
>
> No one trains you like TRIANGLE TECH




Ambassador knows how to plan for and dedicate an appropriate level of resources to support the project and complete the transition on time with little client interruption. We will prepare a detailed, written implementation plan that will include all action items, timelines, and responsibilities unique to your School:

**Technology Implementation –** Setting up your School's selected service model and the technology and enterprise integrations (SIS, LMS, Financial Systems, eBook Readers, and Digital and Publisher Platforms)




**Training for Booklist Adoption –** Preparing your staff on the adoption process and timelines, as well as reviewing the first semester booklist

**Marketing –** Creating a plan and communications schedule leading up to the launch

Once the initial roll-out is completed, our team will routinely coordinate user group meetings with the appropriate school staff to review all the current systems and procedures in place, as well as discuss recommendations to further customize our services, enhance the student experience, and ease administrative functions.

## UGS'S SUCCESSFUL TRANSITION AND IMPLEMENTATION

UGS is committed to ensuring a **seamless and efficient transition** in the implementation of retail operations at UMW. Our **comprehensive transition plan** outlines key milestones, including **staffing, stocking, equipping, and merchandising the retail facilities**, while detailing specific roles and responsibilities to maintain operational continuity. Additionally, UGS will execute a **structured IT integration plan**, ensuring smooth system installations, banking arrangements, and service agreements. The transition timeline will also include **staff training and other essential setup activities** to support a fully functional campus store. Below is a detailed project schedule that ensures **minimal disruption** and a **successful launch**.

We have developed a 325-point schedule covering every aspect of the transition to the University of Mary Washington Gear Shop. The plan covers renovation and store layout changes; e-commerce website creation; merchandising and product set-up; marketing; point-of-sale set up; hiring and training; hardware and software procurement.

| Action Item | Planning | Execution | Closure |
|---|---|---|---|
| Review with designer/renovation construction partners to develop floor plan, flooring, and fixture concepts | Week 1 | Weeks 2-4 | Week 5 |
| Construction and installation of new flooring, wall treatments and fixtures | Week 8 | Weeks 9-15 | Week 16 |
| Design and develop primary e-commerce website | Week 2 | Weeks 3-8 | Week 9 |
| Create and launch survey to campus population re: new gear shop and merchandise. Evaluate results. | Week 2 | Weeks 3-7 | Week 8 |
| Set up any new social media channels (Instagram, Facebook) | Week 4 | Weeks 5-6 | Week 7 |
| Count existing product inventory and validate against list provided by college/vendor | Week 6 | Weeks 7-9 | Week 10 |

| | | | |
|---|---|---|---|
| Select and order items for orientation and/or grand opening | Week 1 | Weeks 2-15 | Week 16 |
| Hire open positions, complete all new hire paperwork with HR, and establish start dates | Week 4 | Weeks 5-10 | Week 11 |
| Provide on-boarding training for all positions | Week 5 | Weeks 6-10 | Week 11 |
| Order POS hardware and set up system for in-store transactions | Week 4 | Weeks 5-8 | Week 9 |

**2. IN THE EVENT OF A TRANSITION TO A NEW CAMPUS STORE VENDOR, THE SUCCESSFUL BIDDER SHOULD MAKE EMPLOYMENT OFFERS TO THE CURRENT CAMPUS STORE STAFF WHERE APPLICABLE. THE BIDDER SHOULD OUTLINE THEIR STRATEGY FOR EVALUATING AND INTEGRATING THE CURRENT STAFF INTO THEIR OPERATIONS TO MAINTAIN CONTINUITY AND LEVERAGE THE STAFF'S EXPERIENCE AND KNOWLEDGE.**

University Gear Shop acknowledges and agrees with this statement.

# S. EXPERIENCE AND QUALIFICATIONS OF FIRM:

**1. PROVIDE A LIST OF FOUR (4) COMPARABLE ACADEMIC INSTITUTIONS OR OTHER FACILITIES FOR WHICH SIMILAR GOODS AND SERVICES ARE CURRENTLY BEING PROVIDED. INCLUDE NAMES, ADDRESSES, E-MAIL AND PHONE NUMBERS OF THE APPROPRIATE CONTACT PERSON.**

For a list of Ambassador's and UGS's references, including contact information and scope of services, please see **Attachment 5 and Attachment 6**.

**2. STATE THE FIRM'S CAPABILITY FOR ENHANCING THE UNIVERSITY'S RETAIL PROGRAM, BY IDENTIFYING THE GOALS AND STRATEGIES IMPLEMENTED AT ONE SITE OF A SIMILAR SIZE AND NATURE TO UNIVERSITY OF MARY WASHINGTON.**

Ambassador has included three case students for your reference at the end of this document, highlighting successful course materials programs created and powered by Ambassador.

1. Rasmussen University Turns to Inclusive Access to Increase Student Success
2. Post University's Inclusive Access Program: A Game Changer for the Institution & its Students
3. Herzing University's Inclusive and Equitable Access Programs: Delivering Flexible, Scalable, and Personalized Experiences

UGS has a proven track record of **enhancing university retail programs** through strategic renovations, merchandising improvements, and operational efficiencies. A prime example of this success is **Abilene Christian University (ACU)**, where UGS executed a **comprehensive store remodel and retail enhancement strategy**. By modernizing the store layout, expanding product offerings, and optimizing customer engagement, UGS helped ACU achieve **increased sales, improved shopping experiences, and stronger brand representation**.

### GOALS & STRATEGIES IMPLEMENTED AT ABILENE CHRISTIAN UNIVERSITY

**Store Remodel & Renovation for an Inviting Retail Space**

- Redesigned the **store layout** to create a **modern, open, and engaging atmosphere** that enhances foot traffic and shopping flow.

- Added **improved lighting, interactive displays, and flexible merchandising fixtures** to showcase a broader selection of ACU-branded merchandise.
- Established dedicated sections for **athletic gear, alumni collections, student essentials, and NIL merchandise**, making it easier for customers to find what they need.

**Expanded Product Selection to Meet Community Needs**

- Curated a **wider variety of apparel, gifts, accessories, and school supplies** to appeal to students, faculty, alumni, and visitors.
- Introduced **premium and budget-friendly options** to make ACU-branded merchandise accessible to all customers.
- Integrated **NIL athlete merchandise**, allowing student-athletes to benefit from name, image, and likeness opportunities.

**Increased Revenue & Enhanced Shopping Experience**

- Leveraged **data-driven merchandising strategies** to optimize inventory selection and minimize stockouts.
- Implemented **online ordering, print-on-demand merchandise, and exclusive product launches**, leading to increased engagement and higher conversion rates.
- Strengthened community connections by **partnering with local artisans and vendors** to introduce unique, ACU-branded specialty items.

Applying these **proven strategies** at the **University of Mary Washington**, UGS will create a **modernized, inviting retail space** that enhances **school spirit, improves customer engagement, and drives revenue growth**—ensuring a **thriving and sustainable retail program** for the university.

### 3. PROVIDE A LIST OF ALL CLIENTS LOST WITHIN THE LAST THREE YEARS. INCLUDE A CONTACT NAME AND TELEPHONE NUMBER, THE LENGTH OF SERVICE AT THE ACCOUNT, THE REASON FOR THE LOSS. INCLUDE CLIENTS LOST AS A RESULT OF MERGER OR ACQUISITION.

#### AMBASSADOR DISCONTINUED CLIENTS

Ambassador is proud of **our high client retention rate of 99%**. Generally speaking, a handful of clients that no longer use our services are schools that no longer operate or have left Ambassador by mutual agreement. Ambassador would be pleased to provide more detailed examples with the completion of a mutual non-disclosure or during advanced stage discussions.

#### UGS DISCONTINUED CLIENTS

Please see **Attachment 7**.

### 4. PROVIDE THE AMOUNT OF ANNUAL SALES THE FIRM HAS WITH EACH VASCUPP MEMBER INSTITUTION. A LIST OF VASCUPP MEMBERS CAN BE FOUND AT: HTTPS://VASCUPP.ORG/MEMBERS

Ambassador and UGS do not currently operate a VASCUPP location.

### 5. SUBMIT A COPY OF THE COMPANY'S MOST RECENT ANNUAL REPORT, MOST RECENT FILING OF SECURITIES AND EXCHANGE (SEC) REPORTS (10Q AND 10K) AND ANY OTHER WRITTEN EVIDENCE OF THE COMPANY'S FINANCIAL STABILITY. IF SEC REPORTS ARE NOT FILED, INCLUDE LITIGATION RECORD FOR PRIOR, CURRENT AND PENDING MATTERS IN ADDITION TO FINANCIAL STATEMENTS/BALANCE SHEETS FOR THE PAST TWO YEARS OF OPERATION. SIMILAR DATA IS REQUESTED FOR SUBCONTRACTORS, IF APPLICABLE.

Ambassador is a financially strong, stable company with reputable and proven business practices and strategies that bolster our financial performance, exceeding one hundred million dollars annually. Being a privately held corporation, we typically do not provide audited financial statements, however D&B notes us as a low-risk company and we would welcome a meeting with our respective finance teams to address any questions.

University Gear Shop is part of a listed Group with our shares being publicly traded. Our shareholders' base ranges from Institutional and high net worth to retail holders who are very supportive of our strategy. The Group mainly trades in the UK and the US. Having established offices in the US in 2018 the Group has shown exponential growth each year despite the impact of the pandemic. Our fiscal year runs from April 1st to March 31st with an external audit carried out annually. Our growth is primarily driven by our North American revenue and continues to perform exceptionally. We are experienced in branded merchandise and are positioned and focused on delivering high-quality innovative services and continued growth.

| | FY22 | FY23 | FY24 |
|---|---|---|---|
| North American Revenue | $14.7m | $21.0m | $31.0m |
| Adjusted Operating Profit | $2.8m | $4.1m | $4.6m |

(Numbers extracted from segmental reported disclosure from Group Accounts)

# T. OTHER RELATED GOODS/SERVICES:

**1. DESCRIBE OTHER RELATED GOODS AND/OR SERVICES PROVIDED BY YOUR FIRM. PROVIDE INFORMATION TO DEMONSTRATE HOW THESE GOODS AND/OR SERVICES COULD BENEFIT THE UNIVERSITY AND INCLUDE THE ASSOCIATED PRICING FOR THE TERM OF THE CONTRACT. PROVIDE INFORMATION TO ADDRESS HOW NEWLY INTRODUCED PRODUCTS AND SERVICES WOULD BE OFFERED AND INCLUDED IN THE CONTRACT. INCLUDE INFORMATION ON YOUR ABILITY TO PROVIDE MOST FAVORED NATIONS PRICING.**

UGS offers a comprehensive suite of goods and services beyond traditional campus retail, designed to enhance the University of Mary Washington's (UMW) overall retail program, strengthen university branding, and provide cost-effective solutions. Our ability to offer competitive pricing, flexible service models, and innovative product offerings ensures that UMW benefits from a dynamic, high-quality retail partnership.

### RELATED GOODS & SERVICES AND THEIR BENEFITS TO UMW

**Print-on-Demand & Custom Merchandise Services**

- Service Description: UGS provides print-on-demand capabilities, allowing for low-risk inventory expansion and custom designs for special events, athletics, and student organizations.
- Benefits:
  - Eliminates overstock and inventory risk.
  - Allows for personalized apparel, ensuring unique merchandise for alumni, families, and students.
  - Supports NIL student-athlete merchandise, enabling compliance with NCAA regulations.
- Pricing: Offered at competitive bulk rates, with tiered pricing based on order volume.

**Promotional Products & Branded Merchandise for Campus Departments**

- Service Description: UGS supplies custom-branded promotional items (e.g., water bottles, tote bags, lanyards, pens) for university events, recruitment efforts, and athletics.
- Benefits:
    - Supports admissions, alumni, athletics, and student life initiatives.
    - Offers bulk discounted pricing for university-wide orders.
    - Ensures consistent branding across all departments.
- Pricing: Custom quotes based on order size and product type, with volume discounts.

**Online & Mobile Retail Platforms**

- Service Description: UGS offers a fully integrated e-commerce platform for UMW-branded merchandise, including a mobile-friendly storefront.
- Benefits:
    - Expanded reach beyond campus for alumni, family, and fans.
    - Seamless in-store pickup options and direct shipping.
    - Integrated loyalty programs for student and alumni engagement.
- Pricing: No setup fees; revenue-sharing model based on sales volume.

**Local Vendor Partnerships & Artisanal Products**

- Service Description: UGS collaborates with local artisans and businesses to incorporate regionally inspired UMW-branded merchandise into the campus store.
- Benefits:
    - Strengthens ties with the local business community.
    - Supports sustainability initiatives by featuring locally sourced goods.
    - Offers unique, handcrafted items that appeal to alumni and visitors.
- Pricing: Revenue-sharing or wholesale agreements with local vendors.

**Campus Event & Pop-Up Retail Services**

- Service Description: UGS provides on-site and mobile pop-up retail experiences for homecoming, athletic events, commencement, and student orientation.
- Benefits:
    - Maximizes sales opportunities at high-traffic events.
    - Ensures timely availability of event-specific merchandise.
    - Increases campus store visibility and engagement.
- Pricing: Percentage-based revenue-sharing for on-campus sales.

## PRICING STRATEGY & NEWLY INTRODUCED PRODUCTS/SERVICES

- Most Favored Nations Pricing: UGS guarantees best-in-market pricing, ensuring that UMW receives the same or better pricing than any comparable institution.
- New Product/Service Inclusion:
    - UGS will establish a quarterly review process to evaluate new products and service opportunities.
    - New offerings will be presented with competitive pricing and seamlessly integrated into the existing contract.
    - Flexible contract amendments will allow for the addition of emerging retail trends and custom requests.

Providing diverse, high-quality goods and services while maintaining competitive pricing and operational flexibility, UGS ensures that UMW's campus retail program remains innovative, financially sustainable, and aligned with the university's long-term goals.

# U. SUSTAINABILITY:

**1. OPERATIONS WILL ALIGN WITH UMW SUSTAINABILITY MISSION, GOALS AND INITIATIVES.**

Ambassador and UGS acknowledge and agree to this statement.

**2. DESCRIBE HOW YOU WILL ESTABLISH WASTE REDUCTION AND DIVERSION TARGETS, FOCUSING ON SINGLE-USE PLASTICS AND OTHER DISPOSABLES. PLEASE PROVIDE INFORMATION TO DEMONSTRATE THE OVERALL ENVIRONMENTAL IMPACT OF YOUR PROPOSED APPROACH. INCLUDE INFORMATION ON YOUR RECOMMENDATIONS TO REDUCE THE ENVIRONMENTAL IMPACT AND CREATE EFFICIENCIES.**

### AMBASSADR'S SUSTAINABILITY COMMITMENT

For faculty and students who seek digital materials because of their potential smaller environmental footprint, Ambassador can source an array of digital options, including eBooks, Access Codes, Codeless Access, Courseware, Digital Homework Solutions, and other interactive resources. As mentioned, Ambassador manages the entire digital content process, helping faculty find and compare digital options and providing students with seamless access.

When it comes to physical course materials ordered through the Online Bookstore, Ambassador has implemented strict warehouse sustainability policies for packing and shipping items:

- Shipment Packaging – Our packaging is made of household recyclable materials. Boxes are recyclable cardboard, package fill is recycled newsprint paper, and poly ship bags are recyclable. No foam or other non-recyclable packaging is used in our shipments.
- Reuse and Reduce Practices – We practice solutions like SIPP (ships in product packaging) to reuse and reduce repackaging. Our goal is to use the smallest size packaging that makes sense for each shipment to reduce the footprint allowing carriers to fit more in each truck. Additionally, we use plastic poly bags for the smallest shipments where cardboard takes up too much room.
- Sustainability Partnerships – We partner with a recycling company to ensure all cardboard and plastics from incoming packaging is properly recycled out of our facility.
- Facility Sustainability – We use energy efficient LED lights on motion detectors to only light areas in immediate use, use electric forklift and pallet jacks, and use energy efficient HVAC systems.

Additionally, Ambassador can help your staff find and source both local and non-local products that are sustainable, including items made from recycled and green materials.

### UGS'S SUSTAINABILITY POLICY ESG

UGS is committed to **sustainability and waste reduction** by implementing **strategic waste diversion targets** and minimizing reliance on **single-use plastics and disposable materials**. Our approach focuses on **reducing environmental impact, increasing operational efficiencies, and promoting eco-conscious retail solutions** that align with the University of Mary Washington's sustainability goals.

### UGS'S WASTE REDUCTION & DIVERSION STRATEGIES

**Phasing Out Single-Use Plastics**

- **Eliminate plastic shopping bags** in favor of **reusable, biodegradable, or recycled paper alternatives**.
- Transition to **reusable or compostable product packaging** for merchandise and shipping materials.
- **Encourage reusable alternatives** by offering discounts for customers using their own bags or drinkware.

**Sustainable Product Offerings**

- Introduce **eco-friendly merchandise**, including:
  - Apparel made from **recycled materials or organic cotton**.
  - School supplies and accessories made from **bamboo, recycled plastic, or biodegradable materials**.
  - **Sustainably sourced and Fair Trade-certified gifts**.
- **Partner with local vendors** to reduce the carbon footprint of merchandise transportation.

**Waste Diversion & Recycling Programs**

- Implement **a store-wide recycling program** for paper, cardboard, and electronics.
- Offer **recycling bins for plastic, glass, and aluminum** to encourage responsible disposal.
- Develop a **textbook and apparel buy-back program** to extend product lifecycles and reduce waste.

**Digital Solutions & Paper Reduction**

- **Shift to digital receipts** and implement **e-commerce order confirmations** to reduce paper usage.
- **Optimize print-on-demand** merchandise production to minimize waste from unsold inventory.
- Encourage campus departments to adopt **eco-friendly promotional products**, such as **recycled notebooks and refillable pens**.

**Environmental Impact & Efficiency Gains**

By adopting these strategies, UGS will:
✅ **Reduce single-use plastics** in-store by at least **80% within the first year**.
✅ **Increase landfill diversion rates**, ensuring more waste is repurposed or recycled.
✅ **Lower the store's carbon footprint** through local sourcing and sustainable packaging.
✅ **Educate the campus community** on sustainable shopping habits through signage and marketing initiatives.

Integrating **waste reduction, responsible sourcing, and sustainable operations**, UGS ensures that the **University of Mary Washington's campus store** operates as an **environmentally conscious and forward-thinking retail space**.

# V. EXCLUSIVE BEVERAGE AGREEMENT:

**THE UNIVERSITY MAINTAINS THE RIGHT TO HAVE EXCLUSIVE AGREEMENTS. THE FIRM SHALL COMPLY WITH ALL THE AGREEMENT'S TERMS AND CONDITIONS. CURRENTLY, THE UNIVERSITY HAS AN EXCLUSIVE AGREEMENT WITH PEPSI BOTTLING GROUP, LLC. FOR CARBONATED AND NON-CARBONATED SOFT DRINKS; FOUNTAIN TEA; BOTTLED TEAS, COFFEES, JUICES, ISOTONIC BEVERAGES AND BOTTLED WATER. FIRM BEVERAGES WILL BE THE ONLY BEVERAGES SOLD, DISTRIBUTED, SAMPLED OR OTHERWISE MADE AVAILABLE ON THE CAMPUS. THE FOLLOWING BEVERAGES ARE EXEMPT FROM EXCLUSIVITY; (1) NON-BOTTLED TAP WATER/FILTERED WATER STATIONS, HOT CHOCOLATE, FRESHLY BREWED COFFEE AND TEA, FRESH SQUEEZED JUICES, AND MILK; (2) OTHER BEVERAGE PRODUCTS USED IN A PROPRIETARY RECIPE BY RESTAURANTS ON CAMPUS (INGREDIENT(S) FROM AN ALTERNATIVE SOURCE WILL NOT BE ADVERTISED). IN NO EVENT WILL EXEMPTED BEVERAGES BE ADVERTISED ON CAMPUS.**

University Gear Shop acknowledges and agrees with this statement.

# ATTACHMENT 1
# AMBASSADOR'S IMPLEMENTATION TIMELINE

## Project Timeline

| Date | Task | Owner | Details |
|---|---|---|---|
| Day 1 | **MSA Executed** | UMW/Ambassador | |
| Day 1-6 | **Partnership Kick-off Meeting (1 or 2 days as needed)** | UMW/Ambassador | Ambassador's Client Services and Technology Teams meet with UMW's designated team to kickoff project to provide an overview of the implementation process and capabilities, determine timeline, roles, and responsibilities of each project team member. |
| | ***Introductions*** | UMW/Ambassador | |
| | ***High-Level Overview*** | UMW/Ambassador | |
| | ***Timeline Review*** | UMW/Ambassador | |
| Day 7 - 28 | **Detailed Requirements Meetings (once or twice weekly)** | UMW/Ambassador | Schedule and hold meetings with relevant stakeholders to work through in-depth requirements and specification around implementation activities: Technology Configuration, UMW Integrations, Faculty Adoption Process, Marketing, and Communication. |
| | ***Course Materials Review*** | UMW/Ambassador | |
| | ***Vendor and Third-Party Review*** | UMW/Ambassador | |
| | ***Finance and Business Requirements Review*** | UMW/Ambassador | |
| Day 28 | **Confirm Final Requirements & Specifications** | UMW/Ambassador | Confirm final requirements and specifications for staffing; Ambassador support process, onboarding process, booklist adoption process, and system integration planning. |
| Day 29 - 72 | **Begin Integrations Set-up, Testing and Configuration (Weekly IT team meetings)** | UMW/Ambassador (IT Teams) | Work with UMW's IT to configure set up and test all required enterprise system integrations. |
| | ***Verify Test Integration Files*** | Ambassador | Ensure all files are transferred smoothly with no interruptions or failures. |
| | ***Coordinate and Setup eBook LMS Integration*** | Ambassador | Ambassador will provide UMW with eBook LMS integration details and set up any required training and/or meetings needed for this implementation. |
| | ***Test eBook LMS Integration; Finalize eBook Redemption Email, Error Message, etc.*** | UMW/Ambassador | Ambassador and UMW will have a testing phase for eBooks to ensure a seamless experience for all stakeholders. |
| | ***Provide Historical Student Purchases Data on Ambassador's Pre-Ambassador Template*** | UMW | If this information is available from the previous provider, we ask that the UMW requests a report so we can implement our duplication feature for current students. Ambassador will load this data into our system so students are alerted of materials they have already purchased. |
| | ***Load Pre-Ambassador Data in Ambassador System*** | Ambassador | |

| | | | |
|---|---|---|---|
| **Day 29 - 84** | **Regular Ongoing Project Meetings (Booklists, Publishers, Accounts)** | UMW/Ambassador | Ambassador and UMW project teams meet regularly to advance requirements, training schedule and technical specifications. |
| | ***Provide Completed Course Materials Information on Ambassador's Booklist Template*** | UMW | UMW provides Ambassador with adoption data (including ISBN, publisher, course codes, etc. ) via BookAT or BookIT. |
| | ***Booklist Review Meeting*** | UMW/Ambassador | Ambassador Client Services Team analyzes booklist report for availability, new editions, out-of-print, etc. and communicates to UMW faculty/faculty liaison any issues. |
| | ***Provide Publisher/Vendor Special Discount, Account Information and Contact Information for the Publisher/Vendor Account Representative*** | UMW | UMW provides Ambassador with publisher data (including vendor special discounts, account information, pending contract information, etc.) via Ambassador's provided template. |
| **Day 29 - 72** | **Secure Required inventory / Vet Booklist With Publishers** | Ambassador | Ambassador's Client Service Specialist will call publishers and check pricing and availability of all adopted materials. |
| | ***Notify UMW for OOP, New Editions, and Out of Stock at Publisher*** | Ambassador | Ambassador will notify UMW's liaison or faculty of any issues with adopted titles. |
| | ***Identify Possible Replacement Titles as Necessary*** | UMW | UMW will communicate any updates to problem titles. |
| **Day 50 - 84** | **Marketing, Documentation, and Training** | Ambassador | Ambassador will prepare custom marketing and training materials for students, faculty and staff. |
| | ***Customize Support & User Documentation*** | Ambassador | Ambassador will create help guides to aid faculty/students. |
| | ***Schedule BookAT and RODA Training with UMW*** | UMW/Ambassador | Ambassador will provide in-depth, in-person and online training of our systems, Book AT and RODA. |
| | ***Develop Detailed Communications & Marketing Plan*** | UMW/Ambassador | Ambassador and UMW will create and provide marketing materials and communications. |
| | ***Begin Marketing Initiatives*** | Ambassador | Send communication to faculty and students to provide information about new Online Bookstore. |
| **Day 84** | **Online Bookstore Go-Live** | Ambassador | Target date the Online Bookstore will be live for student ordering. |
| | ***Orders Placed & Distributed*** | UMW | Students begin placing orders and Ambassador begins fulfilling student orders. |
| | ***Classes Begin*** | UMW | UMW classes begin. |
| **Day 85 - 128** | **Post Go-Live - Review Meetings (Weekly)** | UMW/Ambassador | Review student/teacher/staff comments; identify process areas needing improvement and implement improvements. |

# ATTACHMENT 2
# AMBASSADOR AND RASMUSSEN UNIVERSITY CASE STUDY

## Ambassador Case Study


## Rasmussen University Turns to Inclusive Access to Increase Student Success

For more than a century, Rasmussen University has been delivering innovative programs and dynamic curriculum. Rasmussen launched its business school in 1900, and today offers certificates, associate's, bachelor's, master's, post-graduate, and doctoral degrees. Evolution is in Rasmussen's nature.

When Rasmussen noticed some students were struggling, it dissected courses with higher failure rates. The common denominator was the lack of course materials being purchased and used by students. **Because textbooks were expensive, students weren't buying them**, which impacted learning outcomes and success. Rasmussen knew the next evolution was upon them and found the answer in Inclusive Access.

Rasmussen turned to its long-time course materials partner, Ambassador Education Solutions, to engage in a six-month pilot to test the ease and acceptance of Inclusive Access. Within a year, it was providing 95% of course materials to students via the program. **Today, Rasmussen supports more than 10,000 students per term through Inclusive Access.**

### WHY INCLUSIVE ACCESS?

Inclusive Access makes sense for Rasmussen academically and financially:

- Allows for lower priced digital materials and volume discounts
- Ensures more students have automatic access to more materials by day one of class

### How Does Inclusive Access Work at Rasmussen?

Rasmussen students simply enroll in their courses to receive their digital materials. The institution provides enrollment and resource information to Ambassador, and Ambassador handles the rest through its Course Materials Platform, RODA. RODA brings everything together through one centralized platform managing licenses and access codes, student support, and the integrations that enable students to easily connect with their materials.

While most students appreciate the interactivity, convenience, and lower cost of Inclusive Access, not all students have fully embraced digital. To meet compliance and provide student choice, Rasmussen allows students to opt-out of Inclusive Access and purchase print and alternative items through its Online Bookstore powered by Ambassador. "Ambassador has helped us establish an **opt-out protocol that is as simple as the click of a button**. Plus, Ambassador's detailed analytics, which includes verified opt-outs, tell us exactly how much we owe," notes Stella Coker, Resource Center Manager at Rasmussen University.


Financial reconciliation is straightforward through RODA too. Rasmussen charges a nominal per resource fee to students, and Ambassador provides Rasmussen with a daily file feed that is posted to the student ledger so **students can track fees and see what's included**. The file also includes charge reversals for students who have dropped courses to prevent overbilling. Additionally, Ambassador's **no-duplicate feature prevents students from obtaining more than one copy**, which has saved the school and its students a significant amount of money. **Ambassador verifies all usage and fees** and provides custom reports to Rasmussen through its RODA dashboard, allowing its accounts payable team to easily track transactions by campus and program.

RASMUSSEN UNIVERSITY

**"Transitioning from print books to nearly all digital has been a large undertaking, yet Ambassador has made it seem almost effortless. Despite sourcing content from different publishers and platforms, Ambassador simplifies everything from access to payment, helping us provide students with a supportive, affordable, and impactful experience."**

–Stella Coker | Resource Center Manager at Rasmussen University

## How are Rasmussen and its Students Benefitting?

For Rasmussen, adopting an Inclusive Access program with Ambassador has made its internal course materials team more efficient. Coker notes, "**Ambassador's attention to detail and data takes a huge burden off us**. In addition to ensuring all materials are in place, any report we need to track these materials is readily available. This helps us understand metrics and trends within our Inclusive Access program so we can be more strategic in our thinking and planning."

For students, Rasmussen's Inclusive Access program is helping more of them engage with their course materials in an effective and affordable way:

- Students have been granted extended access, including new editions, so they can access the content throughout their programs.
- Students are not billed more than once when using the same resources over different courses and terms thanks to Ambassador's system controls.
- Students have quick and easy access to study guides to prepare for certification exams.

Having Ambassador as an ally has helped Rasmussen on the publisher side too:

- Ambassador provides verified usage reports to the publishers on the institution's behalf.
- Ambassador confirms that Rasmussen is getting the agreed-upon pricing and passes along added savings from other publishers that Rasmussen does not regularly engage.
- Ambassador's usage and fee reports are helpful to Rasmussen in its own publisher negotiations.

"Transitioning from print books to nearly all digital has been a large undertaking, yet Ambassador has made it seem almost effortless. Despite sourcing content from different publishers and platforms, **Ambassador simplifies everything from access to payment**, helping us provide students with a supportive, affordable, and impactful experience," says Coker.

Ambassador's and Rasmussen's partnership has been an evolution of its own for nearly two decades. Their collaboration ensures students' needs are aways being met in meaningful ways. Whether through changing fulfillment models or transformative technologies, **Ambassador and Rasmussen are committed to making sure students have easy access to the tools, courseware, and resources they need to succeed**.

## Connect With Us!

AmbassadorEd.com/equitable-and-inclusive-access
Info@AmbassadorEd.com

AMBASSADOR EDUCATION SOLUTIONS

# ATTACHMENT 3
# AMBASSADOR AND POST UNIVERSITY CASE STUDY

## Ambassador Case Study


## Post University's Inclusive Access Program: A Game Changer for the Institution & its Students

Post University prides itself on delivering learning experiences that are relevant, meaningful, and personal. It's no wonder **the institution ranks among the Best Online Programs** by U.S. News & World Report. Post listens to its more than 20,000 students, ensuring their needs are met through career-focused academic programs, flexible online and on-campus modalities, readily available support, and accessible course materials.

As an early adopter of Inclusive Access with its course materials partner, Ambassador Education Solutions, Post University was initially drawn to the immediate availability of resources. This was yet another way Post could **enhance the learning experience** by helping students further engage with their course content in significant ways. Working with Ambassador and leveraging its Inclusive Access technology also eased the entire course materials lifecycle for the institution.

### Why Does Inclusive Access Work for Post University's Students?

**More than 90% of Post University students use eBooks and digital materials exclusively**, and they obtain these materials through Post's Inclusive Access program. Students simply enroll in their courses, pay a per course flat fee for materials, and gain access to their digital resources prior to the start of class. **"Students love how easy it is**; they have grown accustomed to the automatic access and predictable cost, and now it's simply an expectation," said Martha Driscoll, Course Materials Coordinator at Post University.

**Ambassador manages all eBook licenses and access codes on behalf of Post, as well as the direct system integrations with publishers and content platforms to make access seamless for students.** When students use publisher direct content through their LMS, Post leverages Ambassador's Pub-PinPoint technology, which makes this content easier to track and manage, while **ensuring Post does not overpay** and publishers are paid for actual usage. Ambassador also provides detailed instructions, FAQs, and a direct line of support for any student inquiries.

In rare cases where additional course materials are needed beyond what is covered by the fee, Post directs students to its Online Bookstore, powered by Ambassador, where they can easily order additional items and pay with financial aid or by credit card.

Post UNIVERSITY® EST.1890

**"We knew it would be too big of an undertaking to manage Inclusive Access in-house. By collaborating with Ambassador, every piece of our Inclusive Access program is well managed and executed."**

–Martha Driscoll | Course Materials Coordinator at Post University

## How Has Inclusive Access Eased Course Materials Operations at Post University?

Ambassador's Inclusive Access solution simplifies the entire course materials management process for Post. **"We knew it would be too big of an undertaking to manage Inclusive Access in-house. By collaborating with Ambassador, every piece of our Inclusive Access program is well managed and executed,"** says Driscoll. Post counts on Ambassador's course materials platform, RODA, alongside its team of professionals, to handle everything from course materials adoption and fulfillment to reporting and financial reconciliation. With RODA, Post can easily streamline all course materials operations including materials, integrations, support services, analytics, financial controls, and compliance, all through one platform.

Ambassador ensures faculty have the information they need to compare and select materials within Post's fee guidelines, and the company maintains Post's booklist and works with the publishers to secure faculty adoptions. **Ambassador aggregates all eBook and access code content, verifies usage and fees, and provides Post with one accurate, consolidated invoice**.

Specifically, Ambassador's technology tracks when the same student uses the content in multiple classes or when a student drops the class so Post only pays what is owed. **"When we reconcile transactions, credits, and opt-outs, both our team and our publisher partners can count on Ambassador's reports and analytics, so we are all on the same page,"** says Driscoll.

Post's standard and customized reports are available through the school's RODA dashboard. According to Driscoll, "Sometimes we need to dive into an Inclusive Access course or a transaction in more detail, and Ambassador's reports tell us everything we need to know. It's all right there in an easy-to-understand format."

## The Ambassador-Post Partnership

Having worked together for decades, Ambassador and Post share a commitment to student success. Together, they've created an Inclusive Access program that reinforces Post's focus on relevant, meaningful, and personalized learning experiences.

**"There would be no Inclusive Access at Post without Ambassador,"** says Driscoll. The Post University team works closely with Ambassador's Client Services team on everything from daily course materials management tasks to big picture strategy ideas.

"Our partnership works really well. **In many ways, Ambassador is like having another co-worker on our team**. They are there to answer any questions, offer support, and make sure everything is running as effectively and efficiently as possible. It's been a great experience for our school and our students."

## Connect With Us!

**AmbassadorEd.com/equitable-and-inclusive-access**
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AMBASSADOR EDUCATION SOLUTIONS

# ATTACHMENT 4
# AMBASSADOR AND HERZING UNIVERSITY CASE STUDY

## Ambassador Case Study

### Herzing University's Inclusive Access and Equitable Access Programs Deliver Flexible, Scalable, and Personalized Experiences

Herzing University, a private nonprofit institution, takes great pride in the fact that its students are engaged, and its student services and technology are ranked among the best in the nation. **What's more, over 90% of its graduates say they are satisfied with their Herzing University experience**.

Because the student experience is a priority for the Herzing team, they are committed to personalizing the education process. Herzing's student-first approach was one of the driving factors in the development of its Inclusive Access and Equitable Access programs, giving students a choice in how they obtain and use course materials.

### Flexibility for Herzing Students

In 2018, Herzing University sought the help of Ambassador Education Solutions to create and launch Inclusive Access and Equitable Access programs designed for Herzing's online and on-campus students. **Herzing wanted course materials to be flexible, customizable, and affordable.** According to Jeanette Ward, System Bookstore Administrator at Herzing, "We wanted all students, regardless of modality or location, to be able to choose a course materials path based on their own needs and situations." **Through Herzing's Inclusive Access and Equitable Access programs, students can obtain some or all their materials**, including eBooks, digital resources, textbooks, uniforms, labs, kits, and more.

**Ambassador tracks student opt-in and opt-out data** and matches it with Herzing's student records. As the start of class approaches, **Ambassador provides Herzing with customized reporting**, including identifying those students who have not yet visited the online bookstore to opt-in to receive their course materials.

**AMBASSADOR POWERS TWO COURSE MATERIALS MODELS FOR HERZING STUDENTS:**

- **Herzing's Online Bookstore:** for school voucher purchases where students opt-in to validate and receive course materials; students agree to a learner resource fee that is part of tuition, or they can apply financial aid.
- **Additional Herzing Site:** designated for credit card purchases where students who don't opt-in to the learner resource fee may purchase items separately, or they can purchase additional or alternative materials.

**Today, Inclusive Access and Equitable Access materials comprise roughly 97% of course materials transactions for Herzing students.**

Ward states, "**Ambassador's solutions and analytics function as student engagement and outreach measures**. Our student advisors can send reminders and offer tailored support to make sure each student understands the process and is prepared with their course materials."

Today, Inclusive Access and Equitable Access materials comprise roughly 97% of course materials transactions for Herzing students. **"Ambassador makes the entire course materials process easy and straightforward for our students** – they like knowing that they have a choice, and really appreciate the simplicity," says Ward.

HERZING®
UNIVERSITY

> **"Ambassador makes the entire course materials process easy and straightforward for our students – they like knowing that they have a choice, and really appreciate the simplicity"**
>
> –Jeanette Ward
> System Bookstore Administrator at Herzing University

## Transparency and Scalability for Herzing University

Herzing first connected with Ambassador through an industry referral, and quickly initiated a partnership where Ambassador's team handled the heavy lifting for a smooth transition. The two organizations worked through the implementation and fine-tuned things along the way, **specifically addressing Herzing's unique digital content needs around the ordering, dissemination, and tracking of large amounts of access codes**.

Fast forward to today and the partnership is as strong as ever. "Ambassador is a great ally -- from investigating availability for hard-to-source materials or items faculty can't find on their own, to helping us negotiate with publishers we don't work with regularly, to securing the lowest prices and verifying usage and fees so materials remain affordable. Additionally, **having a dedicated account manager means we always have someone in our corner** who intimately understands our unique needs and acts quickly any time we have a question or need help."

Herzing continues to grow its programs and enrollments. "New programs are always coming into play, and we need to be able to attach course materials quickly. **Ambassador works with publishers to make sure we get the materials we need when we need them**, and it scales our Inclusive Access and Equitable Access programs to make sure all our students are well supported," notes Ward.

According to Ward, "We spend a lot of time in the RODA system – it is very user-friendly. Not only does RODA help us maintain bookstore operations, but it also empowers us to customize the student experience. **The insights and conclusions we draw from Ambassador's analytics and reporting give us the ability to address each student individually**. At the end of the day, it's really all about our students and the experience they take away from Herzing."

Herzing also relies on Ambassador's Course Materials Platform, RODA, for its comprehensive reporting functionality. For example, Herzing frequently uses Ambassador's eBook Usage Report to:

- See who is accessing which materials
- Remove items that are not being used, which has saved both the school and its students money
- Rely on data that the University's financial teams need to measure costs and efficiencies
- Verify usage and fees so materials remain affordable


## Connect With Us!

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AMBASSADOR
EDUCATION SOLUTIONS

# ATTACHMENT 5: AMBASSADOR REFERENCES

Ambassador's longtime commitment to affordability, accessibility and transparency of course materials continues to be recognized by higher education institutions. Ambassador has a vast client base with a number of clients that are of similar, larger and smaller size than your school. A sampling includes:

**School: University of Alaska Anchorage**
**Contact:** David Weaver, Executive Director of Campus Services
**Address:** 3211 Providence Drive, AAC 110, Anchorage , AK 99508
**Phone & Email:** (907) 786-7804 | dweaver@alaska.edu
**Contract Commencement:** 2023
**Scope:** Online Bookstore where students choose from new textbooks, eBooks where available, access codes where available, and used books (marketplace); Inclusive Access for select courses

**School: Carnegie Mellon University**
**Contact:** Ann Floresca, Director, Retail Services
**Address:** 5032 Forbes Avenue, Pittsburgh, PA 15213
**Phone & Email:** 412.268.3373 | afloresc@andrew.cmu.edu
**Contract Commencement:** 2024
**Scope:** Online Bookstore where students choose from new textbooks, eBooks where available, access codes where available, and used books (marketplace)

**School: Wesleyan College**
**Contact:** Kristi Peavy, Library Director
**Address:** 4760 Forsyth Rd, Macon, GA 31210
**Phone & Email:** (478) 757-5201 | kpeavy@wesleyancollege.edu
**Contract Commencement:** 2024
**Scope:** Inclusive Access and Equitable Access, automatically provisioning textbooks, eBooks, access codes, and digital content; additionally, students can login to their personalized student bookstore portal, powered by Ambassador, to check status, retrieve access codes, and get help.

**School: Rasmussen University**
**Contact:** Stella Coker, Procurement
**Phone & Email:** 866-693-2211 ext. 5322 | stella.coker@rasmussen.edu
**Contract Commencement:** 2005
**Scope:** Ambassador All-In for Inclusive Access and Online Bookstore for optional materials available to students (eBooks, access codes, print books, some supplies)

**School: Adtalem Global Education - formerly DeVry Education Group**
**Contact:** Matt Heronemus, Business Process Analyst, Institutional Support Services
**Address:** 1221 N. Swift Rd., Addison, IL 60101
**Phone & Email:** 630.353.5338 | Matthew.heronemus@adtalem.com
**Ambassador Contract Commencement:** 2013
**Scope:** Online Bookstore for all physical and digital materials (eBooks, access codes, print books, uniforms, supplies, and kits)

**School: Aviation Institute of Maintenance, Centura College, Tidewater Tech**
**Contact:** Dr. Joel English, President
**Address:** 4455 South Boulevard, Suite 250, Virginia Beach, VA 23452
**Phone & Email:** 757-456-5065 | jenglish@centura.edu
**Contract Commencement:** 2008
**Scope:** Online Bookstore (eBooks, access codes, print books, laptops, uniforms and supplies)

# ATTACHMENT 6: UGS REFERENCES

UNIVERSITY
GEAR SHOP

## Abilene Christian University

Abilene Christian University
Abilene Christian University Gear Shop
1600 Campus Court
Abilene, TX. 79601

Full-Time Enrollment: 5,000
Date of Service: March 2023 – Present
Annual Retail Volume: $1,800,000.00
Contractual Agreement: 5 Year Term

Lori Herrick
Chief Financial Officer
Phone: 325-674-2662
Email: lori.herrick@acu.edu

## Oakland University

Oakland University
Oakland University Gear Shop
312 Meadowbrook Road
Rochester, MI. 78309

Full-Time Enrollment: 16,100
Date of Service: July 2023 – Present
Annual Retail Volume: $1,700,000.00
Contractual Agreement: 5 Year Term

Chris Reed
Director, Oakland Center
Phone: 248.370.3245
Email: creed@oakland.edu

universitygearshop.com

## Marywood University

Marywood University
Marywood University Gear Shop
Nazareth Student Center
2300 Adams Avenue
Scranton, PA. 78509

Full-Time Enrollment: 2,435
Date of Service: March 2021 – Present
Annual Retail Volume: $400,000.00
Contractual Agreement: 5 Year Term

Wendy Yankelitis
Vice President of Operations
Phone: 570.348.6201
Email: yankelitis@marywood.edu

## Maryville University

Maryville University
The M Store
650 Maryville University Drive
St. Louis, MO. 63141

Full-Time Enrollment: 9,800
Date of Service: July 2024 – Present
Annual Retail Volume: $465,000.00
Contractual Agreement: 3 Year Term

Raphaella Prange
Vice President for Student Affairs
Phone: 217.521.1733
Email: rprange@maryville.edu

## Regis College

Regis College
Regis College Gear Shop
235 Wellesley St.
Weston, MA. 02493

Full-Time Enrollment: 3,200
Date of Service: June 2022 - Present
Annual Retail Volume: $250,000.00
Contractual Agreement: 5 Year Term

Michael O'Keefe
Assoc. VP of Auxiliary & Business
Services
PH: 781.768.7401
EMAIL:
michael.okeefe@regiscollege.edu

# ATTACHMENT 7: UGS DISCONTINUED CLIENTS

UNIVERSITY
GEAR SHOP

**Cancelled or Terminated Contracts**

**Owens Community College:**

Owens Community College (online and pop-up services only)
30335 Oregon Road
Perrysburg, OH 43551

Full-Time Enrollment: 1,880
Date of Service: July 2022 – September 2023

David Wahr
Director of Business Operations
Phone: 567.661.7401
Email: david_wahr@owens.edu

Reason for Cancellation: Both parties agreed this business model is more equipped for a brick-n-mortar solution.

**Salus University:**

Salus University (online and pop-up services only)
8360 Old York Rd.
Elkin Park, PA. 19027

Full-Time Enrollment: 1,200
Date of Service: February 2023 – December 2023

Don Kates
VP of Finance
PH: (215) 780-1242
EMAIL: dkates@salus.edu

Reason for Cancellation: Both parties agreed this business model was not suited for this type institution.

universitygearshop.com

**South Arkansas College**

South Arkansas College
300 South West Avenue
El Dorado, AR. 71730

Full-Time Enrollment: 1,162
Date of Service: November 2023 - May 2024

Jenny Sanders
Vice President of Student Affairs
PH: 870.864.7128
EMAIL: jrsanders@southark.edu

Reason for Cancellation: Management Fee

**Albright College**

Albright College
1621 N 13th St.
Reading, PA 19604

Full-Time Enrollment: 1,393
Date of Service: May 2023 - May 2024

David Tanner
Dean, Arts and Cultural Resources
PH: 610-921-7619
EMAIL: dtanner@albright.edu

Reason for Cancellation: Self-Op

# ATTACHMENT 8/F: SMALL BUSINESS SUBCONTRACTING PLAN

**SMALL BUSINESS SUBCONTRACTING PLAN**
MUST BE COMPLETED AND RETURNED WITH PROPOSAL PACKAGE

**All small businesses must be certified by the Commonwealth of Virginia, Department of Small Business and Supplier Diversity (DSBSD) by the due date of the solicitation to participate in the SWaM program. Certification applications are available through DSBSD online at http://sbsd.virginia.gov.**

**DEFINITIONS:**
**"Micro Business"** means a business that is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees and no more than $3 million in average annual revenue over the three year period prior to their certification.

**"Small business"** means a business independently owned and controlled by one or more individuals who are U.S. citizens or legal resident aliens, and together with affiliates, has 250 or fewer employees, or average annual gross receipts of $10 million or less averaged over the previous three years. One or more of the individual owners shall control both the management and daily business operations of the small business. *Note: DSBSDcertified women- and minority-owned businesses shall also be considered small businesses when they have received DSBSD small business certification.* (*Code of Virginia*, § 2.2-4310)

**"Woman-owned business"** means a business that is at least 51% owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more women. (*Code of Virginia*, § 2.2-4310)

**"Minority-owned business"** means a business that is at least 51% owned by one or more minority individuals who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more minority individuals. (*Code of Virginia*, § 2.2-4310)

**Bidder Name:** Ambassador Education Solutions
**Preparer Name:** Marc Konesco, SVP of Sales **Date:** March 10, 2025

**Bidder Name:** University Gear Shop
**Preparer Name:** Bill Boney, EVP of Retail Operations **Date:** March 10, 2025

**INSTRUCTIONS:**

A. If you are certified by the Department of Small Business and Supplier Diversity (DSBSD) as a small business, complete only Section A of this form. This shall not exclude DSBSD-certified women-owned and minority-owned businesses when they have received DSBSD small business certification.

B. If you are not a DSBSD-certified small business, complete Section B of this form. For the bid to be considered and the bidder to be declared responsive, the bidder shall identify the portions of the contract that will be subcontracted to DSBSD-certified small business in Section B.

**ATTACHMENT F (CONT'D)**

**Section A**

If you are certified by the Department of Small Business and Supplier Diversity (DSBSD), are you certified as a:

**Check All That Apply: N/A**

☐ Micro Business ☐ Small Business ☐ Woman-Owned Business ☐ Minority-Owned Business

DSBSD Certification No.: N/A Expiration Date: N/A

**Section B**

Populate the table below to show your plans for utilization of DSBSD-certified small businesses in the performance of this contract. This shall not exclude DSBSD-certified women-owned and minority-owned businesses that have received the DSBSD small business certification. Include plans to utilize small businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.

**Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement**

| Small Business Name, Address & DSBSD Cert No. | Indicate if also: Micro (O), Women (W), or Minority (M) Certified | Contact Person, Telephone & Email | Type of Goods and/or Services | Planned Involvement During Initial Period of the Contract (%) | Planned Contract Dollars During Initial Period of the Contract ($) |
|---|---|---|---|---|---|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | **Total Planned Subcontracting Spend ($)** | N/A |

# ATTACHMENT 9:
# AMBASSADOR CERTIFICATE OF LIABILITY INSURANCE

ACORD

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 03/05/25

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

PRODUCER
TICK & COMPANY INC
1 Hollow Lane
Lake Success, NY 11042-1215

CONTACT NAME:
PHONE (A/C, No, Ext): (516)365-6880 FAX (A/C, No): (516)365-6824
E-MAIL ADDRESS:

| INSURER(S) AFFORDING COVERAGE | NAIC # |
|---|---|
| INSURER A : HARTFORD INS. CO. OF THE MIDWEST | 19489 |
| INSURER B : FEDERAL INS.CO. | 20281 |
| INSURER C : TWIN CITY FIRE INS. CO. | 29459 |
| INSURER D : | |
| INSURER E : | |
| INSURER F : | |

INSURED
AMBASSADOR COLLEGE BOOKSTORES, INC
445 BROADHOLLOW RD
MELVILLE, NY 11747
(631) 770 1010

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS | |
|---|---|---|---|---|---|---|---|---|
| A | X COMMERCIAL GENERAL LIABILITY; CLAIMS-MADE; X OCCUR; GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY; PRO-JECT; LOC; OTHER: | Y | | 12UUNBJ4666 | 07/01/24 | 07/01/25 | EACH OCCURRENCE | $ 1,000,000 |
| | | | | | | | DAMAGE TO RENTED PREMISES (Ea occurrence) | $ 300,000 |
| | | | | | | | MED EXP (Any one person) | $ 10,000 |
| | | | | | | | PERSONAL & ADV INJURY | $ 1,000,000 |
| | | | | | | | GENERAL AGGREGATE | $ 2,000,000 |
| | | | | | | | PRODUCTS - COMP/OP AGG | $ 2,000,000 |
| | | | | | | | | $ |
| A | AUTOMOBILE LIABILITY; ANY AUTO; OWNED AUTOS ONLY; SCHEDULED AUTOS; X HIRED AUTOS ONLY; X NON-OWNED AUTOS ONLY | | | 12UENGC3602 | 07/01/24 | 07/01/25 | COMBINED SINGLE LIMIT (Ea accident) | $ 1,000,000 |
| | | | | | | | BODILY INJURY (Per person) | $ |
| | | | | | | | BODILY INJURY (Per accident) | $ |
| | | | | | | | PROPERTY DAMAGE (Per accident) | $ |
| | | | | | | | | $ |
| B | X UMBRELLA LIAB; X OCCUR; EXCESS LIAB; CLAIMS-MADE; DED; X RETENTION $ 10,000 | | | 7982-80-68 | 07/01/24 | 07/01/25 | EACH OCCURRENCE | $ 20,000,000 |
| | | | | | | | AGGREGATE | $ 20,000,000 |
| | | | | | | | | $ |
| D | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N; ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH); If yes, describe under DESCRIPTION OF OPERATIONS below | N / A | | 12WERT7075 | 07/01/24 | 07/01/25 | X PER STATUTE; OTH-ER | |
| | | | | | | | E.L. EACH ACCIDENT | $ 1,000,000 |
| | | | | | | | E.L. DISEASE - EA EMPLOYEE | $ 1,000,000 |
| | | | | | | | E.L. DISEASE - POLICY LIMIT | $ 1,000,000 |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



ACORD 25 (2016/03)

# ATTACHMENT 10:
# UGS CERTIFICATE OF LIABILITY INSURANCE

THE HARTFORD
BUSINESS SERVICE CENTER
3600 WISEMAN BLVD
SAN ANTONIO TX 78251

February 5, 2025

TD Bank 1
2005 MARKET ST FL 2
PHILADELPHIA PA 19103-7018

**Account Information:**

| | |
|---|---|
| **Policy Holder Details :** | **UNIVERSITY GEAR SHOP LLC** |

**Contact Us**

**Need Help?**
Chat online or call us at
(866) 467-8730.
We're here Monday - Friday.

Enclosed please find a Certificate Of Insurance for the above referenced Policyholder. Please contact us if you have any questions or concerns.

Sincerely,
Your Hartford Service Team

**WLTR005**

ACORD®

# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 02/05/2025

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATIONIS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

| PRODUCER | CONTACT NAME: | |
|---|---|---|
| MICHAEL PHILLIP KACHUR<br>13652968<br>1504 BLACKWOOD CLEMENTON ROAD<br>BLACKWOOD NJ 08012 | PHONE (A/C, No, Ext): (856) 637-2226 | FAX (A/C, No): |
| | E-MAIL ADDRESS: | |
| | INSURER(S) AFFORDING COVERAGE | NAIC# |
| | INSURER A : Hartford Underwriters Insurance Company | 30104 |
| **INSURED** | INSURER B : Hartford Fire and Its P&C Affiliates | 00914 |
| UNIVERSITY GEAR SHOP LLC<br>3715 GARRETT RD # 1008<br>DREXEL HILL PA 19026 | INSURER C : | |
| | INSURER D : | |
| | INSURER E : | |
| | INSURER F : | |

**COVERAGES** **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED.NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE | ADDL INSR | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/Y YYY) | LIMITS | |
|---|---|---|---|---|---|---|---|---|
| A | COMMERCIAL GENERAL LIABILITY<br>CLAIMS-MADE / X OCCUR<br>X General Liability<br>GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY / PRO-JECT / LOC<br>OTHER: | X | X | 13 SBA BB2FK3 | 10/27/2024 | 10/27/2025 | EACH OCCURRENCE | $1,000,000 |
| | | | | | | | DAMAGE TO RENTED PREMISES (Ea occurrence) | $1,000,000 |
| | | | | | | | MED EXP (Any one person) | $10,000 |
| | | | | | | | PERSONAL & ADV INJURY | $1,000,000 |
| | | | | | | | GENERAL AGGREGATE | $2,000,000 |
| | | | | | | | PRODUCTS - COMP/OP AGG | $2,000,000 |
| A | AUTOMOBILE LIABILITY<br>ANY AUTO<br>ALL OWNED AUTOS / SCHEDULED AUTOS<br>X HIRED AUTOS / X NON-OWNED AUTOS | | | 13 SBA BB2FK3 | 10/27/2024 | 10/27/2025 | COMBINED SINGLE LIMIT (Ea accident) | $1,000,000 |
| | | | | | | | BODILY INJURY (Per person) | |
| | | | | | | | BODILY INJURY (Per accident) | |
| | | | | | | | PROPERTY DAMAGE (Per accident) | |
| A | X UMBRELLA LIAB / X OCCUR<br>EXCESS LIAB / CLAIMS-MADE<br>DED / RETENTION $ 10,000 | X | | 13 SBA BB2FK3 | 10/27/2024 | 10/27/2025 | EACH OCCURRENCE | $9,000,000 |
| | | | | | | | AGGREGATE | $9,000,000 |
| B | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N<br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below | N/ A | X | 13 WEC BD8BZS | 03/01/2024 | 03/01/2025 | X PER STATUTE / OTH-ER | |
| | | | | | | | E.L. EACH ACCIDENT | $1,000,000 |
| | | | | | | | E.L. DISEASE -EA EMPLOYEE | $1,000,000 |
| | | | | | | | E.L. DISEASE - POLICY LIMIT | $1,000,000 |
| A | Employment Practices Liability Insurance | | | 13 SBA BB2FK3 | 10/27/2024 | 10/27/2025 | Each Claim Limit | $25,000 |
| | | | | | | | Annual Aggregate Limit | $25,000 |

***DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES*** **(ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

Those usual to the Insured's Operations.

**CERTIFICATE HOLDER**

TD Bank 1
2005 MARKET ST FL 2
PHILADELPHIA PA 19103-7018

**CANCELLATION**

**SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.**

AUTHORIZED REPRESENTATIVE

Susan L. Castaneda



**ACORD 25 (2016/03)** **The ACORD name and logo are registered marks of ACORD**

AGENCY CUSTOMER ID: ____________________

LOC# : __________

# ADDITIONAL REMARKS SCHEDULE



| AGENCY | NAMED INSURED |
|---|---|
| MICHAEL PHILLIP KACHUR | UNIVERSITY GEAR SHOP LLC<br>3715 GARRETT RD # 1008<br>DREXEL HILL PA 19026 |
| POLICY NUMBER: SEE ACORD 25 | |
| CARRIER: SEE ACORD 25 / NAIC CODE: | EFFECTIVE DATE: SEE ACORD 25 |

**ADDITIONAL REMARKS**

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM**

**FORM NUMBER:** ACORD 25 **FORM TITLE:** CERTIFICATE OF LIABILITY INSURANCE

Waiver of Subrogation applies in favor of the Certificate Holder per the Business Liability Coverage Form SL 00 00, attached to this policy. The Business Liability Coverage Part includes a Blanket Additional Insured By Contract Endorsement, Form SL 30 32. The Umbrella Liability Supplemental Policy includes Blanket Additional Insured by Contract - Umbrella Endorsement SU 00 02. Waiver of Subrogation applies in favor of the Certificate Holder per Waiver of our Right to Recover from Others Endorsement WC000313, attached to this policy.

ACORD 101 (2014/01)