

## Standard Contract

### UCPUMW 26-2127

#### International and Education Abroad Insurance Services

This contract, between CIEE, INC. DBA INEXT INSURANCE, 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.

**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 May 31, 2027, with nine (9) 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. Any addenda and the original solicitation, RFP 26-2127, dated June 22, 2026 to include:
  - a. The Statement of Needs
  - b. The General Terms and Conditions
  - c. The Special Terms and Conditions;
3. UMW Hosted Technology Services Addendum (HTSA)
4. The Contractor’s proposal dated July 17, 2026 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 agrees to provide the following services:

The University of Mary Washington (UMW), through its Center for International Education, requires insurance services for inbound international participants and education abroad program participants. These services shall be provided by a qualified firm with demonstrated experience delivering insurance and claims services to institutions of higher education within the international and education abroad healthcare market.

The selected Offeror(s) shall provide services as outlined below. Offerors must furnish a detailed response within their proposal, specifically addressing each requirement.

A. All Insured; Requirements:

1. Cost:

The proposal must detail all costs to the student and/or University, including all available coverage options.

- a. Plans should be structured to include a zero deductible, where possible.
- b. The proposal must provide pricing for all available enrollment categories, including but not limited to: Student, Student/Spouse, Student/Child, Student/Family, and Student/Children.

2. Age Limitations:

- a. For outbound education abroad participants, pricing should be consistent across all age groups, and no age limitations should apply.
- b. For inbound international participants, the typical age range at UMW is 18–24 for F-1 visa, degree-seeking students.

3. Pre-Existing Conditions:

The University prefers that pre-existing condition exclusions do not apply. However, Offerors must clearly describe any applicable pre-existing condition limitations, including applicable timeframes and conditions.

4. Prescription Drug Coverage:  
Coverage must be available for both inbound international and outbound education abroad participants.
5. Athletic Injuries:
  - a. Policies must provide appropriate medical coverage for athletic injuries, including those arising from amateur, interscholastic, club/intramural, and NCAA-level activities. Coverage limits should meet or exceed industry standards and institutional risk management expectations.
  - b. Athletic injury coverage should be included in the standard policy; however, it may be offered as an optional rider or add-on.
6. Dental Coverage  
Dental coverage options must be available for both inbound international and outbound education abroad participants. Coverage should include routine services for inbound participants and, at a minimum, emergency dental coverage for outbound students, faculty, and staff.
7. Customer Support:  
A responsive, toll-free telephone number must be available to inbound international and outbound education abroad participants, as well as to parents or family members (as applicable), University faculty and staff, and Center for International Education (CIE) personnel.
8. Claims Processing:  
The Offeror must provide a clear, written procedure outlining the timely and accurate processing of claims.
9. Account Support:  
The Offeror must provide designated representative(s) to assist with claims processing, payments, issue resolution, forms preparation, and requests for information.
10. Premium Structure:  
Premium rates should be consistent regardless of age or sex, where feasible. Evidence of insurability shall not be required. Coverage provided under the policy shall be primary.
11. Proration of Coverage:  
Insurance rates must be prorated from the initial enrollment date on a monthly basis through the policy expiration date, which shall be midnight on July 31 of each year unless otherwise specified.
12. Reporting Requirements:  
Monthly reports must be provided to the University, including enrollment data and claims activity, with expenses broken down by category. Reports should also identify and summarize denied claims.
13. Policy Updates:  
Any adjustments to premiums and/or changes to policy language must be submitted to the University's Office of Risk Management by February 1 of each renewal year, along with appropriate supporting documentation.
14. Regulatory Compliance:  
The insurance policy must be filed and approved in the Commonwealth of Virginia and must comply with all applicable federal and Virginia insurance regulations. Policies issued through out-of-state trusts or association plans are not acceptable.
15. Marketing and Enrollment Materials:  
The Offeror shall provide examples of brochures, applications, enrollment materials, and any related marketing or informational materials with the proposal.
16. Reporting Samples:  
The Offeror shall provide examples of annual reports demonstrating the type of usage and program data that will be provided to the University.



17. Additional Services:

The Offeror should describe any additional or value-added services that may benefit the University's programs.

- a. Examples may include innovative methods to monitor enrollment and ensure required coverage and payment compliance for participants.

B. Inbound International Participants – Specific Requirements:

1. Coverage for F-1 Students:

Coverage options must be available for F-1 visa, degree-seeking students. While federal regulations do not require insurance coverage for F-1 students, the University requires access to appropriate coverage options.

2. J-1 Visa Compliance:

Insurance policies for inbound J-1 participants must meet or exceed the minimum requirements established by U.S. Department of State regulations (22 C.F.R. § 62.14).

3. Domestic Plan Options:

Inbound international participants may consider domestic insurance plans (i.e., plans designed for U.S. residents), even though such plans may not include benefits such as repatriation of remains or medical evacuation. Offerors should include these plans as an option, where appropriate.

4. Plan Options and Flexibility:

Offerors should provide a range of plan options for F-1 students, including, where available, high-deductible, low-premium options.

5. Minimum Coverage Levels (J-1 Participants):

For participants subject to J-1 visa requirements, policies must meet or exceed the following minimum coverage levels:

- a. \$100,000 per accident or illness
- b. \$25,000 for repatriation of remains
- c. \$50,000 for emergency medical evacuation

6. Open Enrollment Period:

An Open Enrollment Period should be available for inbound international participants from August 1 through September 15 of each policy year. During this period:

- a. Claims submitted for injury or sickness should be eligible for coverage if the participant enrolls by September 15.
- b. Premiums and benefits should be applied retroactively to an August 1 effective date.

7. Enrollment After Open Enrollment:

Offerors should allow inbound international participants to enroll after the Open Enrollment Period, with premiums prorated based on the enrollment date.

8. Eligibility for Coverage:

All international participants sponsored by the University under F or J visa status must be eligible for coverage under the plan. This includes, but is not limited to, students participating in internships or Optional Practical Training (OPT), as well as visiting researchers and other University-sponsored participants in J status.

- a. F-1 students should not be required to maintain coverage beyond their date of graduation.

C. Outbound / Education Abroad – Specific Requirements:

1. Core Coverage:

Plans for international medical insurance must include comprehensive coverage for accident and illness and should include a zero deductible, where possible. Coverage should also include mental health services.

2. **Minimum Coverage Levels:**  
Plans for education abroad participants, faculty, and staff must clearly identify coverage limits for accident and illness. Coverage levels should meet or exceed industry standards for higher education international programs.
3. **Payment Method:**  
Proposals should reflect the University's preference for a direct-bill payment protocol rather than reimbursement.
4. **Enrollment Flexibility:**  
Enrollment should be permitted at any time throughout the year for education abroad participants, faculty, and staff.
5. **Enrollment Duration Options:**  
Education abroad participants, faculty, and staff should be able to enroll in coverage on a weekly or monthly basis.
6. **Online Enrollment System:**  
Offerors must provide an online enrollment system that allows participants to complete registration, receive confirmation, and access or print identification cards and coverage documentation within a short time period.
7. **Enrollment Materials:**  
Identification cards and policy documentation must be provided to all enrolled participants within forty-eight (48) hours of enrollment.
8. **Required Coverage Components:**  
Plans must include, at a minimum:
  - a. Routine and emergency medical coverage
  - b. Accidental death and dismemberment
  - c. Emergency medical evacuation
  - d. Emergency medical reunion
  - e. Repatriation of mortal remains
9. **Additional Coverage and Services:**  
Plans should include:
  - a. Evacuation coverage for political unrest
  - b. Evacuation coverage for natural disasters
  - c. Risk management and advisory services, including international situation monitoring, emergency alerts, participant tracking, and a user-friendly mobile application compatible with major platforms

**PRICING:** See Attachment A

**CONTRACT ADMINISTRATION:** The Director of Center for International Education, 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:**

- A. **ANTI-DISCRIMINATION:** By submitting their bids or proposals, bidders or offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, 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, available for review on the UMW Procurement Services website. If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (§6 of the Rules Governing Procurement).

In every contract over \$10,000, provisions 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:
  - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, 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 the contractor. The 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 contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
  - c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting these requirements. If the contractor employs more than five employees, the contractor shall:
    - i. provide annual training on the contractor's sexual harassment policy to all supervisors and employees providing services in the Commonwealth, except such supervisors or employees that are required to complete sexual harassment training provided by the Department of Human Resource Management, and
    - ii. post the contractor's sexual harassment policy in (a) a conspicuous public place in each building located in the Commonwealth that the contractor owns or leases for business purposes and (b) the contractor's employee handbook.
2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

- B. **APPLICABLE LAWS AND COURTS:** 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 courts of the Commonwealth. The contractor shall comply with all applicable federal, state and local laws, rules and regulations.
- C. **ASSIGNMENT OF CONTRACT:** A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- D. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for at least five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Agency, its authorized agents, and/or State auditors shall have full access to, and the right to examine any of said materials during said period.

- E. **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.
- F. **DEBARMENT STATUS:** By submitting their bids or proposals, bidders or offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting bids or proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.
- G. **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.
- H. **eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS:** The eVA Internet electronic procurement solution, website portal, 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:
1. Effective July 1, 2014, the Vendor Transaction Fees are:
    - i. DSBSD-certified Small Businesses: 1%, capped at \$500 per order.
    - ii. 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.
- I. **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.
- J. **NONDISCRIMINATION OF CONTRACTORS:** A bidder, offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the bidder or offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious

character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.

- K. **PRECEDENCE OF TERMS:** These Mandatory General Terms and Conditions and the Commonwealth of Virginia Procurement Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. **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. **COOPERATIVE PROCUREMENT/ADDITIONAL USERS - USE OF AGREEMENT BY THIRD PARTIES:**

It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions, or any University affiliated agency and/or corporation may access any resulting contract if authorized by the Contractor. Use of this Agreement does not preclude any participating entity from using other agreements or competitive processes.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. 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 agreement 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.

The Contractor is strongly encouraged to offer additional discounts to all contract participants as the result of increasing aggregated spend among all entities accessing the contract. A plan for extending deeper discounts among all contract participants will be requested during negotiations.

2. **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.

3. **E-VERIFY PROGRAM:** 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.
4. **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.
5. **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:**

- a. 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.
- b. Employer's Liability - \$100,000.
- c. 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.



6. **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 on the [VASCUPP Website](#).
7. **SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:**
- a. It is the goal of the University that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential bidders/offers are required to submit a Small Business Subcontracting Plan. Unless the bidder/offeror is registered as a Department of Small Business and Supplier Diversity (DSBSD) certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to DSBSD-certified small businesses. This shall not exclude DSBSD-certified women-owned and minority-owned businesses when they have received DSBSD small business certification. No bidder/offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by DSBSD by the due date for receipt of bids or proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the procurement office at a minimum the following information: name of small business with the DSBSD certification number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided.
  - b. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the University on a quarterly basis, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the procurement office at a minimum the following information: name of firm with the DSBSD certification number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the University. The University reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.
  - c. Each prime contractor who wins an award valued over \$200,000 shall deliver to the University on a quarterly basis, information on use of subcontractors that are not DSBSD-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the procurement office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted, and type of product or service provided.
7. **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.

8. **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.
9. **CHANGES TO THE CONTRACT:** Changes can be made to the contract in any of the following ways:
- a. The parties may agree in writing 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.
  - b. The University may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the University a credit for any savings. Said compensation shall be determined by one of the following methods:
    - a. By mutual agreement between the parties in writing; or
    - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the University's right to audit the contractor's records and/or to determine the correct number of units independently; or
    - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the University with all vouchers and records of expenses incurred and savings realized. The University shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the University within thirty (30) days from the date of receipt of the written order from the University. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Manual for Institutions of Higher Education and Their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the University or with the performance of the contract generally.
10. **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.

11. **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. The Contractor agrees:
  - a. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
  - b. 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
  - c. 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.

12. **CONTROLLING VERSION:** 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 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. **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.

14. **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.

15. **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.

16. **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.

17. **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.
18. **NON-ASSIGNMENT:** Neither Party shall assign or transfer its rights or obligations under this Contract without the prior written consent of the other Party.
19. **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.
20. **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  
Attn.: Procurement Services  
1301 College Avenue  
Fredericksburg, VA 22401

If to the Contractor: CIEE, Inc. dba iNext Insurance  
Attn: Muriel McDonald  
400 Congress Street  
Portland, ME. 04101

21. **PAYMENT TERMS:**

1. To Prime Contractor:

- a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.
- b. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.

- c. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
  - d. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 §53).
2. To Subcontractors:
- a. A contractor awarded a contract under this solicitation is hereby obligated:
    - i. To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
    - ii. To notify the agency and the subcontractor(s), in writing, of the contractor's intention to withhold payment and the reason.
3. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.
- a. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.
  - i. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.



22. **RENEWAL OF CONTRACT:** This contract may be renewed by the University upon written agreement of both parties for Nine (9) One-Year Renewals, or as negotiated, under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration. Only at the time of renewal may prices be negotiated for the upcoming term.
23. **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.
24. **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.
25. **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 via [BoardDocs](#). Additional information regarding Title IX policies and procedures is available on the [Title IX web page](#).

**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](mailto: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.

**CIEE, INC. DBA INEXT INSURANCE**

Signature: 

Printed Name: Muriel McDonald

Title: Senior Sales Executive

Date: 08/18/2026

Phone: 207-553-4100

Email: mmcdonald@cieee.org

**UNIVERSITY OF MARY WASHINGTON**

Signature: Melva A. H. Kishpaugh Digitally signed by Melva A. H. Kishpaugh  
Date: 2026.08.19 14:05:43 -04'00'

Printed Name: Melva A. H. Kishpaugh

Title: Director, Procurement Services

Date: August 19, 2026

## ATTACHMENT A - PRICING

### OUTBOUND

#### 1. Cost:

Currently UMW has access to most iNext plans and upgrades. For this RFP, I will be using the same plans UMW has for simplicity purposes.

Supplemental plans are great options for students who may already have insurance through a third-party provider or an overseas university and need coverage for benefits not covered by their other insurance.

Comprehensive plans act as primary insurance when the participant is abroad. These plans provide very rich benefits and are available at a daily and monthly rates, making them ideal options for short-term programs.

- All plans are available to students, faculty, staff, chaperones, family members including children. Rates for supplemental plans are for all age bands. Rates for comprehensive plans are from age 13 to 59 (available to children under 13 but enrollment must be done by iNext operation team) and for age 60+.

#### **Comprehensive plans rates:**

| Age Band        | Comprehensive Basic Daily | Comprehensive Basic Monthly | Comprehensive Ultimate Daily | Comprehensive Ultimate Monthly |
|-----------------|---------------------------|-----------------------------|------------------------------|--------------------------------|
| Age 13-59 and < | \$1.75                    | \$43.65                     | \$1.92                       | \$53.55                        |
| Age 60+         | \$5.52                    | \$137.95                    | \$6.06                       | \$169.21                       |

#### **Supplemental plans rates:(364-day maximum, single trip plans)**

|                       |         |
|-----------------------|---------|
| Supplemental Premium  | \$55.86 |
| Supplemental Platinum | \$96.77 |

#### **Upgrades:**

Political and natural disaster evacuation: (per person, per month)

| Standard PND | Added to Comprehensive plan | Added to Supplemental plan |
|--------------|-----------------------------|----------------------------|
|              | \$10.50/month               | \$35.00/year               |
| Enhanced PND | \$16.50/month               | \$49.00/year               |

TELUS Health Student Support Program Mental Health: available in 30-day increments as add-on to base medical plan only

|              |                      |
|--------------|----------------------|
| TELUS Health | \$2.65/month/student |
|--------------|----------------------|

- Pre-existing conditions: sudden and unexpected changes to pre-existing conditions are covered like any other illnesses. The Supplemental Premium and Comprehensive Basic

## **INBOUND**

Currently UMW international students under F1 and J1 visa, including international athletes, are covered under the Cigna plan. Additionally, the Cigna plan covers US students (we had a few students who held dual nationality in the US and another country).

This RFP includes pricing using Cigna as well as an additional option through Blue Cross Blue Shield.

### **Option A: CIGNA Plan based on start date of 11/1/26 to 10/31/27**

1. Cost:

| <b>CIGNA \$250 Deductible In-Network Option</b> | <b>Daily Rate</b> |
|-------------------------------------------------|-------------------|
|                                                 |                   |
| Student Only                                    | \$8.79            |
| Student & 1 Dependent                           | \$24.59           |
| Student & 2 or more Dependents                  | \$38.66           |

| <b>CIGNA \$0 Deductible In-Network Option</b> | <b>Daily Rate</b> |
|-----------------------------------------------|-------------------|
|                                               |                   |
| Student Only                                  | \$8.87            |
| Student & 1 Dependent                         | \$24.87           |
| Student & 2 or more Dependents                | \$39.10           |

| <b>CIGNA Dental</b>            | <b>Daily Rate</b> |
|--------------------------------|-------------------|
|                                |                   |
| Student Only                   | \$0.54            |
| Student & 1 Dependent          | \$1.26            |
| Student & 2 or more Dependents | \$1.99            |

2. Age Limitations: None
3. Pre-existing conditions: Pre-existing conditions are covered immediately with no restrictions.
4. Prescriptions Drugs: Both maintenance and prescribed medications are covered.
5. Athletic Injuries: Covered like any other injuries with no restrictions with no limitations
6. Dental Coverage: Only injuries to sound teeth are covered. Dental benefits can be added to the Cigna for an extra fee (see above table).
7. Customer Support: Muriel McDonald is the primary contact for inbound. She is available Monday through Friday from 8:30 am -5:00 pm. Both Sarah Moran and Jose Sainz also have her cell phone number, and she is available in the evening and weekends to handle emergency calls and enrollments. When Muriel McDonald is out of the office, Maggie Robinson is her backup. Cigna customer service is available 24/7 and their number is listed on the ID cards.

8. Claims Processing: in-house claims department. Students can access their claims through their “MyInsurance” policy dashboard. They can submit claims, review claims status, inquire about claims, find doctors in network, download policy documents, update their personal information, download their ID card. Claims are processed within 10 business days, and reimbursement payments are mailed the next business day after processing while local currency payment may take up to 2 additional days.
9. Account Support: Muriel McDonald is the primary contact.
10. Premium Structure: Premium rates under the proposed program are not based on individual’s age or sex, evidence of insurability is not required, and coverage is designed to operate as primary coverage in accordance with the terms of the policy.
11. Proration of Coverage: Rates will be pro-rated if a student is enrolled for the whole academic year and is not coming for the spring semester for example. A specific explanation must be provided, and the student must not have any claims. If a student has been enrolled for the fall and was not able to obtain a visa and iNext is notified within 30 days, a full refund of the premium will be issued.
12. Reporting Requirements: Enrollment reports can be provided monthly; however, claims reporting is typically provided on an annual basis.
13. Policy Updates: We would do our best to meet the deadline of February first if we can get renewal rates from underwriting prior to that date.
14. Regulatory Compliance: We will comply with the Commonwealth of VA requirements.
15. Marketing and Enrollment Materials: schedule of benefits attached, AM Best Ratings
16. Reporting Samples: enrollment census included.
17. Additional Services:
  - a. Vision care visit covered at 80% one visit every 24 consecutive months
  - b. Emergency medical evacuation covered 100%
  - c. Family travel arrangements
  - d. Return of dependent children
  - e. Repatriation of mortal remains covered at 100%
  - f. Global Telehealth Services available 24/7 via the Cigna Wellbeing App and Envoy homepage
  - g. Mental Health and Emotional Well-being Resources
  - h. Substance use disorder coverage (inpatient and outpatient coverage at 80%)
  - i. Dependents rates available
  - j. Dental discount program available through Careington for international students to purchase on a retail basis if needed

J-1 Compliance: Yes, the Cigna plan meets and exceeds the J-1 visa minimum requirements established by the US Department of State regulations.

Domestic plan option: The Cigna plan covers domestic students.

Plan Options and Flexibility: see other options through Blue Cross Blue Shield

Minimum coverage Levels for J-1 Participants: YES

Open Enrollment Period: YES, UMW must provide explanation in writing to iNext for compliance purposes.

Enrollment after Open Enrollment: It will need to be approved by the insurance carrier. An explanation letter will be required as to why the student needed to be enrolled after the enrolled period passed the September 15<sup>th</sup> date. Cigna can make certain exceptions and can sometimes backdate a policy no more than 90 days.

Eligibility for Coverage: OPT students will be able to enroll in the iNext OPT plan available on a retail basis. Any other F or J students or scholars are eligible to enroll in the Cigna plan. policy documents, enrollment census forms and all additional marketing materials are included.

**Option B: BLUE CROSS BLUE SHIELD Plan**

The plan through Blue Cros Blue Shield is available to all international students on valid F1, J1 visa, their dependents and to students on OPT.

1. Cost:

| BCBS Option 1 |         | BCBS Option 2 |         | BCBS Option 3 |         |
|---------------|---------|---------------|---------|---------------|---------|
|               | Daily   |               | Daily   |               | Daily   |
| Participant   | \$12.77 | Participant   | \$10.71 | Participant   | \$11.00 |
| Spouse        | \$39.60 | Spouse        | \$32.14 | Spouse        | \$33.02 |
| Child         | \$26.42 | Child         | \$21.43 | Child         | \$22.00 |
| Children      | \$52.79 | Children      | \$42.85 | Children      | \$44.02 |

2. Age Limitations: Age 0 to 74.
3. Pre-existing Conditions: Covered but under options 2 & 3, there is a 6-month waiting period.
4. Prescriptions: Covered referred to the schedule of benefits.
5. Athletic Injuries: Covered but limited to \$10,000 benefit under option 2 and \$20,000 under option 1 & 3.
6. Dental Coverage: Only repair to a sound natural tooth is covered up to \$1,000.
7. Customer Support: Muriel McDonald is the primary contact as stated above. BCBS customer service is available 24/7/265 and their number is listed on each student's ID.
8. Claims Processing: BCBS processes claims in their headquarters in King of Prussia, PA. They have the capability to receive claims via mail, email and electronically through the BCBS app or website) as well as by fax. All claims received through their intake area are prepared for processing, generally within 1 to 2 business days. Claim reimbursements are issued via ACH or check made in US dollars. 90% of claims are processed within 10 business and 98% of claims are processed within 15 business days.
9. Account Support: Muriel McDonald is the primary contact for inbound. She is available Monday through Friday from 8:30 am -5:00 pm. Both Sarah Moran and Jose Sainz also have her cell phone number, and she is available in the evening and weekends to handle emergency calls and enrollments. When Muriel McDonald is out of the office, Maggie Robinson is her backup. BCBS customer service is also available 24/7/365 by phone and email inside and outside the US.
10. Premium Structure: One rate for all age bands, and dependent rates:
11. Proration of Coverage: Rates will be prorated if a student is enrolled for the whole academic year and is not coming back for the spring semester. A specific explanation

must be provided in writing by the university and the students but not have any claims. If a student has been enrolled and the policy is not already into effect, iNext will issue a refund. Notifications must be made within 30 days of enrollment.

12. Reporting Requirements: policy documents, enrollment census forms and all additional marketing materials are included.
13. Policy Updates: We would do our best to meet the deadline of February first if we can get renewal rates from underwriting prior to that date.
14. Regulatory Compliance: We will comply with the Commonwealth of VA requirements.
15. Marketing and Enrollment Materials: schedule of benefits attached, AM Best ratings.
16. Reporting Samples: enrollment census attached.
17. Additional Services:
  - a. Unlimited access to telemedicine at no cost
  - b. 24/7/365 support from anywhere in the world
  - c. Global Counseling and Wellness Support Program

J-1 Compliance: Yes, the BCBS plan meets and exceeds the minimum J-1 visa requirements established by the US Department of State regulations.

Domestic plan option: the BCBS does not cover domestic students.

Minimum coverage Levels for J-1 Participants: YES

Open Enrollment Period: YES, UMW must provide explanation in writing to iNext for compliance purposes.

Enrollment after Open Enrollment: It will need to be approved by the insurance carrier. An explanation letter will be required as to why the student needed to be enrolled after the enrolled period passed the September 15<sup>th</sup> date. Typically, BCBS can backdate a policy no more than 60 days,

Eligibility for Coverage: OPT students are covered under the BCBS plan.

**Value-Added Service:** free of charge for international students that can be added to either CIGNA or BCBS plan:

**ASAP Help** (see attached fliers)

Mental health and wellness program through FutureHealth that includes a 24/7/365 counseling line. The first 3 face-to-face visits are at no cost to the student. If the international student needs additional visits, ASAP will coordinate with the insurance company to make sure the provider is in network and that the student's copay is in accordance with the policy language.



**Hosted Technology Services Addendum**

SUPPLIER NAME: CIEE, INC. DBA INEXT INSURANCE

SUPPLIER  
PRODUCT/SOLUTION: Online Enrollment and Insurance Administration Platform

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 or 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 or 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.

**CIEE, INC. DBA INEXT INSURANCE**

SIGNATURE:



PRINTED NAME: Muriel McDonald

TITLE: Senior Sales Executive

DATE: 08/18/2026

**UNIVERSITY OF MARY WASHINGTON**

SIGNATURE:

Melva A. H. Kishpaugh  
Digitally signed by  
Melva A. H. Kishpaugh  
Date: 2026.08.19  
12:19:27 -04'00'

PRINTED NAME: Melva A. H. Kishpaugh

TITLE: Director, Procurement Services

DATE: August 19, 2026



# University of Mary Washington

## Request for Proposal

RFP# 26-2127

International & Education Abroad Insurance  
Services

June 22, 2026



<https://vascupp.org/>

A VASCUPP™ Member Institution  
Issued by Procurement Services  
Fredericksburg, Virginia



**SEALED REQUEST FOR PROPOSAL (RFP)**

**ISSUE DATE:** Monday, June 22, 2026

**RFP NUMBER & TITLE:** RFP 26-2127 - International & Education Abroad Insurance Services

**PROPOSAL DUE DATE & TIME:** **MONDAY, JULY 20, 2026 @ 2:00 PM EST**  
NOTE: Proposals received after the due date and time, as determined by the electronic time stamp generated by the eVA system, cannot be accepted.

**PROPOSAL DELIVERY ADDRESS:** Proposals shall be submitted electronically via the Commonwealth of Virginia's eVA system in accordance with the instructions provided in this solicitation.  
Reference RFP 26-2127

**WORK LOCATION:** ☒ All Campuses ☐ Fredericksburg ☐ Stafford ☐ Dahlgren

**COMMODITY CODE(S):** 95301, 95348, 95352

**PRE-PROPOSAL CONFERENCE:** ☐ Optional ☐ Mandatory ☒ N/A

**CONTRACT OFFICER:** Jennifer Buist **EMAIL:** jbuist@umw.edu

**PERIOD OF CONTRACT:** November 24, 2026 – November 23, 2027, with Nine (9) One-Year Renewals

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 made 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: \_\_\_\_\_

- 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 **Monday, July 6, 2026 @ 2 PM EST**. Responses will be posted as an addendum on eVA.
- II. **PROPOSAL RECEIPT REQUIREMENTS:** Proposals for furnishing the goods/services described herein must be submitted electronically via the Commonwealth of Virginia's [eVA Procurement Portal](#). Physical submissions will not be accepted. **It is the responsibility of the Offeror to ensure that the proposal is submitted through eVA and received on time.**
- A. Late proposals cannot be accepted.
  - B. Offerors should verify successful submission in eVA prior to the deadline.
  - C. *UMW requires the inclusion of a clearly marked redacted proposal to be uploaded in eVA if any portion of the Offeror's proposal contains proprietary information.*
- III. **ADDENDA:** Any changes resulting from the University's requirements will be issued in an addendum and will be posted on the [eVA website](#). It is the sole responsibility of the Offeror to check for all changes to the RFP prior to submission.
- IV. **PUBLIC RELEASE OF INFORMATION:** UMW utilizes a Public Contracts Portal ([Cobblestone](#)) for posting of procurement documents, including winning proposals. Further, if the resulting contract includes cooperative language, the [VASCUPP public portal](#) will be used to house relevant procurement documents, including winning Offeror's proposal.

## **TABLE OF CONTENTS**

|             |                                                                           |    |
|-------------|---------------------------------------------------------------------------|----|
| I.          | PURPOSE                                                                   | 5  |
| II.         | ORGANIZATIONAL OVERVIEW                                                   | 5  |
| III.        | BACKGROUND                                                                | 5  |
| IV.         | CONTRACT PARTICIPATION (COOPERATIVE CONTRACT)                             | 5  |
| V.          | SMALL, WOMAN-OWNED, AND MINORITY-OWNED (SWAM) PARTICIPATION               | 6  |
| VI.         | PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS                          | 6  |
| VII.        | STATEMENT OF NEEDS                                                        | 9  |
| VIII.       | CONTRACT ADMINISTRATION                                                   | 12 |
| IX.         | EVALUATION AND AWARD CRITERIA                                             | 13 |
| X.          | GENERAL TERMS AND CONDITIONS                                              | 13 |
| XI.         | SPECIAL TERMS AND CONDITIONS                                              | 15 |
| XII.        | METHOD OF PAYMENT                                                         | 26 |
| ATTACHMENTS |                                                                           |    |
| A.          | PROPOSAL SUBMISSION CHECKLIST                                             | 27 |
| B.          | PRICING PROPOSAL <b>(MUST BE SUBMITTED W/ PROPOSAL)</b>                   | 28 |
| C.          | SMALL BUSINESS SUBCONTRACTING PLAN <b>(MUST BE SUBMITTED W/ PROPOSAL)</b> | 29 |
| D.          | SWAM SPEND REPORTING (Informational Only)                                 | 31 |
| E.          | INTERNATIONAL INSURANCE HISTORICAL DATA (Informational Only)              | 32 |

***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.***

## **I. PURPOSE:**

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals to establish contracts with qualified sources through competitive negotiation for provision of insurance services for Inbound International and Education Abroad Program Participants for the University of Mary Washington and other institutions per the cooperative procurement clause. Providers for both inbound International and outbound Education Abroad Program participants are required, but the University will consider proposals from providers that can offer one or the other, or both. The University reserves the right, in its best interest, to issue a multiple award.

## **II. ORGANIZATION OVERVIEW:**

The [University of Mary Washington \(UMW\)](https://umw.edu), founded in 1908 and located in Fredericksburg, Virginia, is ranked as a top 10 public liberal arts college nationally in U.S. News and focuses on what matters. Students develop interests into thriving careers through research projects, internships, study abroad programs, community service, and employment opportunities — experiences that turn inspiration into professional success. Mary Wash offers more than 100 majors, minors, and programs; 150+ student organizations and clubs; and NCAA Division III Athletics. Perfectly positioned between Washington, D.C., and Richmond, VA, UMW provides a top-notch curriculum, a close-knit campus community, and a prime location. Learn more at [umw.edu](https://umw.edu).

## **III. BACKGROUND:**

The University provides numerous opportunities for customized education abroad programs for study abroad, foreign language immersion, conservation, volunteerism, service learning, academic research, etc., each year. The University also enrolls students from a wide source of diverse locations around the globe. Health insurance is a University and, in some cases, a federal requirement, although UMW does not participate in a hard waiver program. In order to monitor and ensure insurance purchase, the University advance pays for international students' insurance premiums, and invoices the students accordingly.

- A. Currently, the University provides services to participating students through a University of Mary Washington (UMW) contract with Council on International Educational Exchange, Inc. (CIEE, Inc.), which is available for use through the Virginia Association of State College and University Purchasing Professionals (VASCUPP) cooperative.
- B. Please refer to the solicitation attachments for historical data related to spend against the current contract. These figures are estimated and provided for informational purposes only. The University makes no express or implied guarantee of any particular spend or usage under any contract resulting from this solicitation and shall not be held responsible if actual usage exceeds or does not meet these estimates.

## **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 on the [VASCUPP Website](https://umw.edu)), it is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the contractor.
- B. Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) may be extended to the entities indicated above to purchase goods and services in accordance with the contract terms. 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 UMW. No modification of this contract or execution of a separate agreement 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. 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.

#### **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 contractors to provide for the participation of Small (includes Micro) and otherwise Diverse Businesses through partnerships, joint ventures, subcontracts, and other contractual opportunities.

#### **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 proprietary and/or confidential, 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 the proposal after submission.*
4. Number of Proposals Required: Vendors shall submit one (1) complete electronic proposal through eVA by the date and time specified in this solicitation. Paper or physical media submissions will not be accepted. All proposal documents must be uploaded in eVA in a non-corrupted, readable format and must not be password protected, unless the password is provided at the time of submission. If a redacted copy of the proposal is required, the vendor shall submit one (1) separate electronic redacted copy through eVA, clearly labeled "Redacted," in addition to the complete proposal.
5. Proposal Formatting and Content: Proposals should be as detailed as necessary to enable the University of Mary Washington to properly evaluate the Offeror's capabilities to provide the required services. Proposals shall be:
  - Prepared simply and economically, with attention to minimizing unnecessary content and file size.
  - Submitted electronically through eVA in commonly used, readable file formats.
  - Organized in a clear and logical manner.
  - Straightforward and concise, while fully addressing all solicitation requirements.
  - Formatted to facilitate electronic review, including the use of bookmarks, headings, or tables of contents where appropriate.
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. Complete and return SIGNED RFP cover page. Proposals shall be signed by an authorized representative of the Offeror.
2. Provide a brief description and history of the firm, including information detailing experiences and qualifications of the firm to provide this solution, such as number of years in business providing similar solutions to similar entities, preferably in higher education.
3. Submit a complete response to the RFP, in detail, to include the following:



- a. Offeror shall specify the A.M. Best rating (or equivalent) for the insurance carrier(s) underwriting the proposed plans. If multiple carriers are used, ratings for each must be provided.
- b. Address all requirements of the RFP as outlined in the Statement of Work/Needs. Responses should be organized in the same order as the RFP requirements and clearly demonstrate how the Offeror meets or exceeds each requirement. Failure to address a requirement may result in a lower evaluation score.
- c. Provide a detailed cost proposal including all applicable pricing for plans, coverage levels, and optional services. Pricing should be clearly structured and include, at a minimum:
  1. Rates by coverage type (inbound, outbound, faculty/staff, etc.)
  2. Pricing methodology (e.g., per participant, daily rate, monthly, or program-based)
  3. All optional add-ons or rider costs
  4. Any administrative, service, or implementation fees
  5. Volume discounts or tiered pricing, if applicable

All pricing must be presented in a clear and consistent format to facilitate evaluation.

- d. Provide a list of higher education and/or governmental clients for whom the Offeror has provided similar services within the past three (3) years. Include the following information for each client:
  1. Institution name
  2. Type of services provided
  3. Duration of relationship
  4. Approximate size of program (e.g., number of participants or covered individuals)
  5. Any relevant experience with Virginia institutions, if applicable
- e. If any portion of the services described in this RFP will be provided by third parties, subcontractors, or partner organizations, the Offeror shall identify each entity and clearly describe their role. This includes, but is not limited to:
  1. Insurance carrier(s)/underwriter(s)
  2. Claims administrator(s)
  3. Travel assistance or emergency services provider(s)

The Offeror should describe the relationship with each entity and how services will be coordinated.

- f. Describe the Offeror's business operations and service delivery model as it relates to the services outlined in this RFP. Include an overview of how services will be managed, supported, and delivered to the University.
- g. Identify key personnel who will be assigned to support the University, including a primary point of contact. Provide resumes or summaries of qualifications and relevant experience for each individual, and clearly define their roles and responsibilities.
- h. Describe how the Offeror ensures compliance with all applicable federal, state, and local laws and regulations relevant to the services described in this RFP. This should include, but is not limited to, insurance regulatory compliance, visa-related insurance requirements (e.g., J-1), data privacy/security standards, and claims processing requirements.
- i. Provide information regarding any additional or value-added services not specifically described in the Scope of Work that may benefit the University. Include a description of the service, its potential value, and any associated costs, if applicable.
- j. Provide a detailed description of the Offeror's emergency operations and communications capabilities. This should include, at a minimum:
  1. 24/7 emergency assistance and support services
  2. Communication methods for alerts and notifications (e.g., email, SMS, mobile applications)

3. Access to real-time travel alerts and risk monitoring
4. Emergency response procedures, including medical and security evacuation coordination
5. Ability to support the University with locating and communicating with participants during emergencies

Offerors are encouraged to describe any mobile applications, tracking tools, or additional technologies available to support emergency communications and participant safety.

- k. Provide a Pricing Proposal in accordance with Attachment B.
- l. Complete and return Attachment C – Small Business Subcontracting Plan
- m. Submit any exceptions the Offering firm takes to the Terms and Conditions as stated in this RFP.
- n. 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:**

The University of Mary Washington (UMW), through its Center for International Education, requires insurance services for inbound international participants and education abroad program participants. These services shall be provided by a qualified firm with demonstrated experience delivering insurance and claims services to institutions of higher education within the international and education abroad healthcare market.

The selected Offeror(s) shall provide services as outlined below. Offerors must furnish a detailed response within their proposal, specifically addressing each requirement.

### **A. All Insured; Requirements:**

#### **1. Cost:**

The proposal must detail all costs to the student and/or University, including all available coverage options.

- a. Plans should be structured to include a zero deductible, where possible.
- b. The proposal must provide pricing for all available enrollment categories, including but not limited to: Student, Student/Spouse, Student/Child, Student/Family, and Student/Children.

#### **2. Age Limitations:**

- a. For outbound education abroad participants, pricing should be consistent across all age groups, and no age limitations should apply.
- b. For inbound international participants, the typical age range at UMW is 18–24 for F-1 visa, degree-seeking students.

#### **3. Pre-Existing Conditions:**

The University prefers that pre-existing condition exclusions do not apply. However, Offerors must clearly describe any applicable pre-existing condition limitations, including applicable timeframes and conditions.

#### **4. Prescription Drug Coverage:**

Coverage must be available for both inbound international and outbound education abroad participants.

#### **5. Athletic Injuries:**

- a. Policies must provide appropriate medical coverage for athletic injuries, including those arising from amateur, interscholastic, club/intramural, and NCAA-level activities. Coverage limits should meet or exceed industry standards and institutional risk management expectations.
- b. Athletic injury coverage should be included in the standard policy; however, it may be offered as an optional rider or add-on.

#### **6. Dental Coverage**

Dental coverage options must be available for both inbound international and outbound education abroad participants. Coverage should include routine services for inbound participants and, at a minimum, emergency dental coverage for outbound students, faculty, and staff.

7. Customer Support:

A responsive, toll-free telephone number must be available to inbound international and outbound education abroad participants, as well as to parents or family members (as applicable), University faculty and staff, and Center for International Education (CIE) personnel.

8. Claims Processing:

The Offeror must provide a clear, written procedure outlining the timely and accurate processing of claims.

9. Account Support:

The Offeror must provide designated representative(s) to assist with claims processing, payments, issue resolution, forms preparation, and requests for information.

10. Premium Structure:

Premium rates should be consistent regardless of age or sex, where feasible. Evidence of insurability shall not be required. Coverage provided under the policy shall be primary.

11. Proration of Coverage:

Insurance rates must be prorated from the initial enrollment date on a monthly basis through the policy expiration date, which shall be midnight on July 31 of each year unless otherwise specified.

12. Reporting Requirements:

Monthly reports must be provided to the University, including enrollment data and claims activity, with expenses broken down by category. Reports should also identify and summarize denied claims.

13. Policy Updates:

Any adjustments to premiums and/or changes to policy language must be submitted to the University's Office of Risk Management by February 1 of each renewal year, along with appropriate supporting documentation.

14. Regulatory Compliance:

The insurance policy must be filed and approved in the Commonwealth of Virginia and must comply with all applicable federal and Virginia insurance regulations. Policies issued through out-of-state trusts or association plans are not acceptable.

15. Marketing and Enrollment Materials:

The Offeror shall provide examples of brochures, applications, enrollment materials, and any related marketing or informational materials with the proposal.

16. Reporting Samples:

The Offeror shall provide examples of annual reports demonstrating the type of usage and program data that will be provided to the University.

17. Additional Services:

The Offeror should describe any additional or value-added services that may benefit the University's programs.

- a. Examples may include innovative methods to monitor enrollment and ensure required coverage and payment compliance for participants.

B. Inbound International Participants – Specific Requirements:

1. Coverage for F-1 Students:

Coverage options must be available for F-1 visa, degree-seeking students. While federal regulations do not require insurance coverage for F-1 students, the University requires access to appropriate coverage options.

2. J-1 Visa Compliance:

Insurance policies for inbound J-1 participants must meet or exceed the minimum requirements established by U.S. Department of State regulations (22 C.F.R. § 62.14).

3. Domestic Plan Options:

Inbound international participants may consider domestic insurance plans (i.e., plans designed for U.S. residents), even though such plans may not include benefits such as repatriation of remains or medical evacuation. Offerors should include these plans as an option, where appropriate.

4. Plan Options and Flexibility:

Offerors should provide a range of plan options for F-1 students, including, where available, high-deductible, low-premium options.

5. Minimum Coverage Levels (J-1 Participants):

For participants subject to J-1 visa requirements, policies must meet or exceed the following minimum coverage levels:

- a. \$100,000 per accident or illness
- b. \$25,000 for repatriation of remains
- c. \$50,000 for emergency medical evacuation

6. Open Enrollment Period:

An Open Enrollment Period should be available for inbound international participants from August 1 through September 15 of each policy year. During this period:

- a. Claims submitted for injury or sickness should be eligible for coverage if the participant enrolls by September 15.
- b. Premiums and benefits should be applied retroactively to an August 1 effective date.

7. Enrollment After Open Enrollment:

Offerors should allow inbound international participants to enroll after the Open Enrollment Period, with premiums prorated based on the enrollment date.

8. Eligibility for Coverage:

All international participants sponsored by the University under F or J visa status must be eligible for coverage under the plan. This includes, but is not limited to, students participating in internships or Optional Practical Training (OPT), as well as visiting researchers and other University-sponsored participants in J status.

- a. F-1 students should not be required to maintain coverage beyond their date of graduation.

C. Outbound / Education Abroad – Specific Requirements:

1. Core Coverage:

Plans for international medical insurance must include comprehensive coverage for accident and illness and should include a zero deductible, where possible. Coverage should also include mental health services.

2. Minimum Coverage Levels:

Plans for education abroad participants, faculty, and staff must clearly identify coverage limits for accident and illness. Coverage levels should meet or exceed industry standards for higher education international programs.

3. Payment Method:

Proposals should reflect the University's preference for a direct-bill payment protocol rather than reimbursement.

4. Enrollment Flexibility:

Enrollment should be permitted at any time throughout the year for education abroad participants, faculty, and staff.

5. Enrollment Duration Options:

Education abroad participants, faculty, and staff should be able to enroll in coverage on a weekly or monthly basis.

6. Online Enrollment System:

Offerors must provide an online enrollment system that allows participants to complete registration, receive confirmation, and access or print identification cards and coverage documentation within a short time period.

7. Enrollment Materials:

Identification cards and policy documentation must be provided to all enrolled participants within forty-eight (48) hours of enrollment.

8. Required Coverage Components:

Plans must include, at a minimum:

- a. Routine and emergency medical coverage
- b. Accidental death and dismemberment
- c. Emergency medical evacuation
- d. Emergency medical reunion
- e. Repatriation of mortal remains

9. Additional Coverage and Services:

Plans should include:

- a. Evacuation coverage for political unrest
- b. Evacuation coverage for natural disasters
- c. Risk management and advisory services, including international situation monitoring, emergency alerts, participant tracking, and a user-friendly mobile application compatible with major platforms

## **VIII. CONTRACT ADMINISTRATION:**

- A. The Director of The Center for International Education, 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 services and shall decide all other questions in connection with the services. The Contract Administrator shall not have authority to approve changes in the 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

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

| Criteria                                                                                                                | Point Value |
|-------------------------------------------------------------------------------------------------------------------------|-------------|
| Offeror's capability – Experience based on provided resume(s) of personnel proposed, client recommendations/references  | 40          |
| Quality of proposal – addresses UMW requirements, specific plans or methodology to be used to provide the services      | 25          |
| Service Delivery and Support – approach to account management, claims support, communication, and overall service model | 15          |
| Pricing and Cost Structure                                                                                              | 15          |
| Small Business Subcontracting Plan                                                                                      | 5           |
| Total                                                                                                                   | 100         |

## X. 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.

- A. **ANTI -DISCRIMINATION**: By submitting their bids or proposals, bidders or offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, 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 (available for review on the [UMW Website](#)). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (§6 of the Rules Governing Procurement).

In every contract over \$10,000, provisions 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:
  1. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, 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 the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
  2. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
  3. Notices, advertisements and solicitations placed in accordance with federal law, rule or



regulation shall be deemed sufficient for the purpose of meeting these requirements.

4. If the contractor employs more than five employees, the contractor shall:

- i. provide annual training on the contractor's sexual harassment policy to all supervisors and employees providing services in the Commonwealth, except such supervisors or employees that are required to complete sexual harassment training provided by the Department of Human Resource Management, and
- ii. post the contractor's sexual harassment policy in (a) a conspicuous public place in each building located in the Commonwealth that the contractor owns or leases for business purposes and (b) the contractor's employee handbook.

2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

B. **APPLICABLE LAWS AND COURTS:** 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 courts of the Commonwealth. The contractor shall comply with all applicable federal, state and local laws, rules and regulations.

C. **ASSIGNMENT OF CONTRACT:** A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.

D. **AUDIT:** The Contractor hereby agrees to retain all books, records, and other documents relative to this contract for at least five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Agency, its authorized agents, and/or State auditors shall have full access to, and the right to examine any of said materials during said period.

E. **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.

F. **DEBARMENT STATUS:** By submitting their bids or proposals, bidders or offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting bids or proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.

G. **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.

H. **eVA BUSINESS-TO-GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS:** The [eVA Internet electronic procurement solution](#) website portal, 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:

1. 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.

- I. **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.
- J. **NONDISCRIMINATION OF CONTRACTORS**: A bidder, offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the bidder or offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.
- K. **PRECEDENCE OF TERMS**: These Mandatory General Terms and Conditions and the Commonwealth of Virginia Procurement Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. **PRICE CURRENCY**: Unless stated otherwise in the solicitation, bidders or offerors shall state bid or offer prices in US dollars.

## **XI. SPECIAL TERMS AND CONDITIONS:**

### **A. SOLICITATION:**

1. **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 for a minimum of ten (10) days.

2. **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
3. **CONTRACTOR/SUBCONTRACTOR LICENSE REQUIREMENT:** By my signature on this solicitation, I certify that this firm/individual and any subcontractors are properly licensed for providing the services specified, and shall remain properly licensed during the life of the contract. Additionally, I understand that I may be asked to provide proof of this licensure at any time by the University, if so requested.
4. **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.
5. **COOPERATIVE PROCUREMENT/ADDITIONAL USERS - USE OF AGREEMENT BY THIRD PARTIES:**  
It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions, or any University affiliated agency and/or corporation may access any resulting contract if authorized by the Contractor. Use

of this Agreement does not preclude any participating entity from using other agreements or competitive processes.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. 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 agreement 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.

The Contractor is strongly encouraged to offer additional discounts to all contract participants as the result of increasing aggregated spend among all entities accessing the contract. A plan for extending deeper discounts among all contract participants will be requested during negotiations.

6. **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.
7. **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.

8. **E-VERIFY PROGRAM:** 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.
9. **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.
10. **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:**

- a. 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.
  - b. Employer’s Liability - \$100,000.
  - c. 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.
11. **LATE PROPOSALS:** To be considered for selection, proposals must be submitted through eVA no later than the designated date and time stated in the solicitation. The official time for determining timely receipt shall be the eVA system’s electronic timestamp applied at the moment of submission.  
Proposals that are submitted in eVA after the designated due date and time are automatically disqualified and will not be considered for award. It is the sole responsibility of the Offeror to ensure that its proposal



is successfully submitted and time-stamped in eVA prior to the deadline. The University is not responsible for technical issues on the Offeror's side that prevent timely submission.

12. **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 on the [VASCUPP Website](#).
13. **QUALIFICATION OF OFFERORS:** UMW may make such reasonable investigations as deemed proper and necessary to determine the ability of the Offeror to perform the services and the Offeror shall furnish to UMW all such information and data for this purpose as may be requested. UMW reserves the right to inspect the Offeror's physical facilities prior to award to satisfy questions regarding the Offeror's capabilities. UMW further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such Offeror fails to satisfy UMW that such Offeror is properly qualified to carry out the obligations of the Contract and to provide the services and/or furnish the goods contemplated herein.
14. **SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:**
  - a. It is the goal of the University that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential bidders/offerors are required to submit a Small Business Subcontracting Plan. Unless the bidder/offeror is registered as a Department of Small Business and Supplier Diversity (DSBSD) certified small business and where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to DSBSD-certified small businesses. This shall not exclude DSBSD-certified women-owned and minority-owned businesses when they have received DSBSD small business certification. No bidder/offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by DSBSD by the due date for receipt of bids or proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the procurement office at a minimum the following information: name of small business with the DSBSD certification number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided.
  - b. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the University on a quarterly basis, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the procurement office at a minimum the following information: name of firm with the DSBSD certification number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the University. The University reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.
  - c. Each prime contractor who wins an award valued over \$200,000 shall deliver to the University on a quarterly basis, information on use of subcontractors that are not DSBSD-certified small businesses.



When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the procurement office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted, and type of product or service provided.

15. **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.
16. **UNDERSTANDING OF REQUIREMENTS:** Your signature on your bid/proposal submission certifies your understanding of the following:
  - a. 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.
  - b. 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.
  - c. 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.

B. **CONTRACT:**

1. **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.
2. **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.
3. **CHANGES TO THE CONTRACT:** Changes can be made to the contract in any of the following ways:

- a. The parties may agree in writing 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.
- b. The University may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the University a credit for any savings. Said compensation shall be determined by one of the following methods:
  - a. By mutual agreement between the parties in writing; or
  - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the University's right to audit the contractor's records and/or to determine the correct number of units independently; or
  - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the University with all vouchers and records of expenses incurred and savings realized. The University shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the University within thirty (30) days from the date of receipt of the written order from the University. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Manual for Institutions of Higher Education and Their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the University or with the performance of the contract generally.

4. **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:
  - a. Enhanced Nationwide Criminal Search; which shall include Social Security Number search, address history, legal name and alias, including for job-related criminal history
  - b. DOJ Sex Offender Search and individual evaluation of results
  - c. County Criminal Search for all identified counties.

5. **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. The Contractor agrees:
  - a. To exercise its best efforts and cooperation to affect an orderly and efficient transition to a successor;
  - b. 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
  - c. 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.

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

7. **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.
8. **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.
9. **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.
10. **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.
11. **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.
12. **NON-ASSIGNMENT:** Neither Party shall assign or transfer its rights or obligations under this Contract without the prior written consent of the other Party.
13. **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.
14. **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  
Attn.: Procurement Services  
1301 College Avenue  
Fredericksburg, VA 22401

If to the Contractor:  
Attn:  
ADDRESS LINE 1  
ADDRESS LINE 2

**15. PAYMENT TERMS:**

**1. To Prime Contractor:**

- a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.
- b. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
- c. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
- d. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 §53).

**2. To Subcontractors:**

- a. A contractor awarded a contract under this solicitation is hereby obligated:
  - i. To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
  - ii. To notify the agency and the subcontractor(s), in writing, of the contractor's intention to withhold payment and the reason.

19. **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 via [BoardDocs](#). Additional information regarding Title IX policies and procedures is available on the [Title IX web page](#).



**XII. 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](mailto: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](mailto: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

## ATTACHMENT # A

### RFP 26-2127 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

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- No Questions Accepted after **Monday, July 6, 2026 @ 2 PM EST**. All Questions must be directed toward the Procurement Officer for this solicitation: Jennifer Buist, [jbuist@umw.edu](mailto:jbuist@umw.edu), and 540-654-1382.
- Proposal Due Date: **MONDAY, JULY 20, 2026 @ 2:00 PM EST** - Proposals submitted after 2 PM EST as indicated by the official eVA timestamp will NOT be accepted.
- All proposals must be submitted electronically through the Commonwealth of Virginia's eVA Procurement Portal by the solicitation due date and time. Offerors are responsible for ensuring successful submission in eVA. Proposals submitted by mail, email, or physical delivery will not be accepted.
- **Read the ENTIRE RFP including terms and conditions and attachments carefully before submitting a proposal.**

#### REQUIRED DOCUMENT SUBMISSION

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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 cover page.
- ☐ Any/All signed addenda.
- ☐ Description of the Offering firm's history and expertise.
- ☐ Pricing Proposal (as described in Attachment B)
- ☐ Completed Attachment C, Small Business Subcontracting Plan.
- ☐ Any exceptions taken to University's Terms and Conditions.
- ☐ Current Certificate of Liability Insurance

## **ATTACHMENT B : PRICING PROPOSAL**

Offerors shall submit a comprehensive pricing proposal for all insurance plans and services offered.

Pricing must include all applicable rates and any costs necessary to fully implement and administer the proposed services, including any variations based on plan type, coverage level, duration, or other factors.

Offerors may submit pricing in their standard format (e.g., rate sheets, plan summaries, or similar documentation), provided that pricing is clear, complete, and sufficient for evaluation.

Offerors should structure pricing in a clear and organized manner to facilitate evaluation and comparison by the University.

Offerors are responsible for ensuring that all pricing necessary to evaluate the proposal is included and clearly presented.

All pricing proposals must be submitted with the Offeror's proposal in accordance with the solicitation requirements.

## ATTACHMENT C - 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 online through [DSBSD](#).

#### 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 \$3million 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 C (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: \_\_\_\_\_

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

## ATTACHMENT D

### SWaM and Non-SWaM Subcontractor Spend Reporting

The University of Mary Washington, as a state agency in the Commonwealth of Virginia, is required to report all small business spend to the Department of Small Business and Supplier Diversity (DSBSD). Along with small business spend, importance is also placed on utilizing local woman-owned and minority-owned businesses to procure goods and services for the university. UMW's goal, with enthusiastic support of the Vice President for Administration and Finance and Chief Financial Officer, is to have a total SWaM (small, woman-owned and minority-owned) business spend of 42% each fiscal year.

In accordance with the Governor's Executive Order, each prime contractor who wins an award valued over \$200,000 shall deliver to the contracting agency or institution on a quarterly basis, information on use of subcontractors that are not DSBSD-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the procurement office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted, and type of product or service provided. If you are a vendor who is required to use SWaM subcontractors, as indicated in the contract, or a prime contractor who is required to submit data on non-SWaM subcontractors performing on contracts over \$200,000, please submit your expenditure report below.

Submission dates are:

1<sup>st</sup> Quarter: July 1<sup>st</sup> to September 30<sup>th</sup> – Deadline to send the report is October 15<sup>th</sup>

2<sup>nd</sup> Quarter: October 1<sup>st</sup> to December 31<sup>st</sup> – Deadline to send the report is January 15<sup>th</sup>

3<sup>rd</sup> Quarter: January 1<sup>st</sup> to March 31<sup>st</sup> – Deadline to send the report is April 15<sup>th</sup>

4<sup>th</sup> Quarter: April 1<sup>st</sup> to June 30<sup>th</sup> – Deadline to send the report is July 15<sup>th</sup>

If you experience any issues with the form or need additional assistance/information, please email Procurement Services at [procure@umw.edu](mailto:procure@umw.edu).

|                                      |                                  |
|--------------------------------------|----------------------------------|
| <b>Vendor *</b>                      | <b>Contract Number</b>           |
| <input type="text"/>                 | <input type="text"/>             |
| Please enter the name of the COMPANY | Please enter the CONTRACT NUMBER |

  

|                                                  |                                   |
|--------------------------------------------------|-----------------------------------|
| <b>Name *</b>                                    |                                   |
| <input type="text" value="First"/>               | <input type="text" value="Last"/> |
| Please enter the SUBMITTER'S first and last name |                                   |

  

|                                            |
|--------------------------------------------|
| <b>Email *</b>                             |
| <input type="text"/>                       |
| Please enter the SUBMITTER'S email address |

  

|                                                                                          |
|------------------------------------------------------------------------------------------|
| <b>Select Reporting Method *</b>                                                         |
| <input type="radio"/> Upload Spreadsheet/Document ← Upload document - Excel or Word only |
| <input type="radio"/> Manual Input ← Manually type information for each sub-contractor   |

  

|                                                                                  |
|----------------------------------------------------------------------------------|
| <b>Additional Comments/Information</b>                                           |
| <input type="text" value="Please provide any relevant comments or information"/> |