Standard Contract

UCPUMW 19-861
Annual Fall Virginia Statewide Survey Services

This contract entered into this 17th day of September by Research America, Inc., hereinafter called the "Contractor" and the University of Mary Washington called the, "University" or "UMW".

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

PERIOD OF CONTRACT: July 1, 2019 - June 30, 2020, with five (5) one-year renewal options

CONTRACT DOCUMENTS: The contract documents shall consist of:

1. This signed Contract inclusive of negotiated terms;
2. The Contractor's proposal dated July 30, 2018 including all attachments;
3. The original solicitation, RFP 19-861, dated July 9, 2018 to include:
    a. The Statement of Needs;
    b. The General Terms and Conditions; and
    c. The Special Terms and Conditions.

All of which are incorporated herein by reference and constitute the "contract documents." Any contractual claims shall be submitted in accordance with the contractual dispute procedures set forth in the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors.

SCOPE OF SERVICES: The Contractor shall provide the following surveying and data collection services described herein for the Annual Fall Virginia Statewide Survey:

A. General Survey Specifications:

1. Conduct a probability-based sample of adults, age 18+, who are Virginia State residents, regarding the subject of voting/elections.
    a. Representative sample categories can include but are not limited to characteristics such as region, race/ethnicity, gender, and age.
2. Data collection to run approximately in September each year
3. Sample Survey Design - below is a sample of a survey design commonly used for the annual Virginia survey (Please note - actual survey design may vary from year to year):
    a. Sample size n=1000 Virginia residents
    b. 35% of the interviews shall be completed via landline
    c. 65% of the interviews shall be completed via cellular
    d. Data collection shall be conducted in English
    e. The survey shall use a questionnaire provided by the University at least 7 business days prior to the commencement of the data collection.
4. Weighting and Reporting:
    a. Contractor shall weight the data, adjusting for the fact that not all survey respondents are selected with the same probability, and to account for gaps in coverage in the survey frames.
    b. The data should be put through a post-stratification sample balancing ("raking") procedure utilizing state estimates for Virginia adults, balancing the sample to parameters such as gender, age, race/ethnicity, household telephone usage, and educational attainment.

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c. Contractor shall provide the following report data within 3 business days after completion of the interviews:
   i. A clean, labeled SPSS dataset weighted to population parameters
   ii. American Association for Public Opinion Research (AAPOR) compliant methodological report
   iii. Annotated questionnaire with topline results
   iv. Likely voter index

PRICING: Pricing shall be as follows:

Traditional Telephone (Landline/Cell) Method:

Survey Length	Administrative Costs	Additional Costs	Total Survey Cost Year 1
15-17 minutes	$41,150	$3,600	**$44,750**
17-19 minutes	$43,000	$3,600	**$46,600**
19-21 minutes	$46,500	$3,600	**$50,100**
21-23 minutes	$51,000	$3,600	**$54,600**
23-25 minutes	$56,500	$3,600	**$60,100**

Hybrid Telephone/Web Survey

Survey Length	Administrative Costs	Additional Costs	Total Survey Cost Year 1
15-17 minutes	$36,500	$2,000	**$38,500**
17-19 minutes	$39,600	$2,000	**$41,600**
19-21 minutes	$43,250	$2,000	**$45,250**
21-23 minutes	$45,500	$2,000	**$47,500**
23-25 minutes	$51,250	$2,000	**$53,250**

Optional Renewal Years 2-6 shall receive a 1.5% increase per year.

CONTRACT ADMINISTRATION:

A. Professor of Political Science and International Affairs, Stephen Farnsworth, 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.

GENERAL TERMS AND CONDITIONS: Please refer to the link to follow regarding Required General Terms and Conditions of this Solicitation which are a mandatory part of the resulting contract:
http://adminfinance.umw.edu/procurement/files/2014/11/UMW-General-Terms-and-Conditions-Nov14.pdf

SPECIAL TERMS AND CONDITIONS:

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

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term of the Agreement. Such newly introduced additional Services will be provided to the University at favored nations pricing, terms, and conditions.

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

3. 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.

4. 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.

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

6. 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 vendor for the use of the credit card for payment of invoices, or any order-associated eVA fees. Credit card "check-out fees" or surcharges MUST be disclosed as a flat fee or percentage of invoice total with the bid or offer, and shall be considered in the evaluation process. The University expects that these costs, as well as all contractor business expenses will be built into the contractor's quoted price. The University reserves the right to request certification (with confirmation code) of the vendor's registration with its merchant bank/VISA to invoke "check-out fees" or surcharges for use of the credit card. "Check-out fees" or surcharges for use of the credit card shall not exceed the vendor's cost of acceptance rate.

7. 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.

8. 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.

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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.

9. 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, or via the stamped evidence of delivery, whichever occurs first. Any unofficial notices or communications may be sent via electronic mail.

If to the University:	If to the Contractor:
Attn: Procurement Services	Attn: Thomas Ramsburg
University of Mary Washington	Research America, Inc.
1301 College Avenue	33 Bishop Hollow Road
Fredericksburg, VA 22401	Newtown Square, PA, 17073

10. OWNERSHIP OF MATERIALS: Any furnished materials, including but not limited to reports, analyses, data, etc., shall remain the property of the University. All such items and materials shall be delivered to UMW in usable condition after completion of the work, and prior to submission of the final invoice for payment.

11. PRICE ESCALATION/DE-ESCALATION: Price adjustments may be permitted for changes in the contractor's cost of materials or service cost not to exceed a 1.5% annual increase. Price escalation may be permitted only at the beginning of each renewal term and only when explicitly requested in writing by the contractor. However, "across the board" price decreases are subject to implementation at any time and shall be immediately conveyed to the University. Contractor shall give not less than 30 days advance notice of any price increase to the procurement office. Any approved price increases will be effective only at the beginning of each renewal term. The contractor shall document the amount and proposed effective date of any general change in the cost of service or materials. The procurement office will notify the using agencies and contractor in writing of the effective date of any increase which it approves. However, the contractor shall fill all purchase orders received prior to the effective date of the price adjustment at the old contract prices. The contractor is further advised that decreases which affect the cost of materials are required to be communicated immediately to the purchasing office.

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

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

14. 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

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

15. 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 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 the Department of Minority Business Enterprise (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 purchasing 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 contracting agency or institution 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 purchasing 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 agency or institution. The agency or institution 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 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 purchasing office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted, and type of product or service provided.

16. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing 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.

METHOD OF PAYMENT:

The contractor shall be paid using one of the following three (3) methods for all University initiated procurements:

A. Small Purchase Charge Card (SPCC): At the time of verified receipt of goods or services, if the Contractor accepts credit cards in payment, the University will authorize payment by SPCC, currently Bank of America Visa. Any "Check-out fees" imposed by the contractor must be disclosed prior to the purchase and shall be detailed in a separate line item on the receipt at point of sale. If the contractor's eVA profile indicates acceptance of a credit card in payment, the Commonwealth will pay via charge card for invoices $50,000.00 or less.
B. ePayables through Bank of America: All payments under ePayables will have a net 16 payment term. For more information about this payment option, contact UMW's Accounts Payables department at payables@umw.edu or view http://www.bankofamerica.com/epayablesvendors.

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C. 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 invoices must be received at the following address should reference the eVA purchase order and UMW contract numbers**:

University of Mary Washington
Attention: Accounts Payable
1301 College Avenue
Fredericksburg, VA 22401

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

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

	CONTRACTOR		**UNIVERSITY OF MARY WASHINGTON**
Signature:	Thomas Ramsburg	Signature:	Melva A. H. Kishpaugh
Printed Name:	THOMAS RAMSBURG	Printed Name:	Melva A. H. Kishpaugh
Title:	Director of Operations	Title:	Director, Procurement Services
Date:	10/4/18	Date:	October 5, 2018
FEI/FIN#:	13-3135645		
Phone:	610-354-0696		
Email:	TomR@ResearchAmericainc.com		

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University of Mary Washington | Procurement Services

SEALED REQUEST FOR PROPOSAL (RFP)

ISSUE DATE:	Monday July 9, 2018
RFP NUMBER & TITLE:	RFP 19-861 Annual Fall Virginia Statewide Survey Services
PROPOSAL DUE DATE & TIME:	Wednesday, August 1, 2018 @ 2:00PM EST NOTE: Proposals received after the due date and time cannot be accepted.
PROPOSAL DELIVERY ADDRESS:	University of Mary Washington Procurement Services /Reference RFP 19-861 Eagle Village Executive Offices, Suite 480 1125 Jefferson Davis Hwy., Fredericksburg, VA 22401
WORK LOCATION:	☒ All Campuses ☐ Fredericksburg ☐ Stafford ☐ Dahlgren
COMMODITY CODE(S):	91812, 96160
PRE-PROPOSAL CONFERENCE:	☐ Optional ☐ Mandatory ☒ N/A **DATE & TIME:**
CONTRACT OFFICER:	Michelle Pickham **EMAIL:** Mmiller8@umw.edu
PERIOD OF CONTRACT:	July 1, 2019 - June 30, 2020, with five (5) one-year renewal options

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

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

THIS FORM MUST BE COMPLETED AND RETURNED WITH PROPOSAL

Name of Offering Firm: Research America, Inc.

Address of Offering Firm: 33 Bishop Hollow Road, Newtown Square, PA 19073

DSBSD Certification No.: Not Applicable Expiration Date:

eVA ID: VS0000220509 Tax ID: 13-3135845

Email: robp@researchamericainc.com Telephone: 610-356-1800

Website: http://www.researchamericainc.com Fax: 610-356-3217

Submitted By (Print Name & Title): Robert Porter, CEO

Signature (In Ink): [signature] Date: 7/30/18

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University of Mary Washington

Annual Fall Virginia Statewide Survey Services

Issued By:
University of Mary Washington RFP# 19-861

Research America, Inc.
33 Bishop Hollow Road
Newtown Square, PA 19073
Research America Primary Contact:
Thomas Ramsburg, Director of Operations,
Email: tomr@researchamericainc.com
Phone: 610-356-1800

August 1, 2018

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Letter of Transmittal

August 1, 2018

University of Mary Washington
Procurement Services /Reference RFP 19-861
Eagle Village Executive Offices, Suite 480
1125 Jefferson Davis Hwy., Fredericksburg, VA 22401
Attn: Michelle Pickham, Contract Officer

Re: RFP 19-861 Annual Fall Virginia Statewide Survey Services

Dear Ms. Pickham and Colleagues:

Research America would like to thank the University of Mary Washington for the opportunity to submit a proposal meeting your consulting and research requirements.

Research America, Inc. (Federal Tax Id# 13-3135845) is a privately-owned Pennsylvania corporation that has provided qualitative and quantitative custom political and social research services by telephone, web and print/mail survey research since 1985. We conduct thousands of social research and political surveys each year for nonprofit, government and media organizations each year.

We specialize in providing actionable insights while delivering the highest quality results on-time and on budget. Working in partnership with the University, Research America, Inc. looks forward to assisting in the successful execution this project. We are confident in our ability to complete projects following the project specifications. We have expertise in conducting many types of quantitative studies with citizens and consumers for the private sector, government, and public-sector clients.

Our Team's experience spans decades, our pricing is reasonable, our timelines are realistic, our methodology and approach are based on industry standards, and our understanding of the project is founded in our experience as both client-side and consultancy-side marketing research professionals, delivering the highest quality results on-time and on budget. Team members who are very experienced in public sector surveys will contribute direct assistance and support to the University's projects. All work will be provided through Research America, without the need to subcontract any portion of the work. Please feel free to contact me with any questions regarding our qualifications or any future research needs.

Respectfully,

Robert Porter,
Chief Executive Officer

1. Qualifications of Firm

A. Introduction

About RAI

Research America Inc. (RAI) is a full-service, custom market research company, with extensive experience in designing and executing qualitative and quantitative market research for government, education, and not-for-profit organizations. RAI has provided quality market research and consulting services for over thirty years.

Please refer to Appendices 1 and 2 attached to this proposal for details about Research America's organization, history, and capabilities in marketing research.

Project Management for UMW Projects

Thomas Ramsburg, Director of Operations, will serve as project manager and as your single point of contact during the day to day management of your project.

Thomas Ramsburg
Tel: M: 610-356-1800
Email: tomr@researchamericainc.com

Places of Performance and Hours of Operation

RAI's Newtown Square, Pennsylvania headquarters and client services center will provide facilities, staff and services outlined within the scope of a proposed contract. Project management and survey instrument programming will originate from this location. Our largest client centers in Pennsylvania (multiple locations, including Philadelphia), New York (Rochester) and California (Sacramento) will provide telephone interviewing services. RAI's client services centers schedule interviewing to fulfill project-specific needs.

RAI offers standard client support Monday through Friday, 8 AM to 8 PM Eastern. A RAI project manager is available to speak with clients at any time during an active CATI study. Household interviews are optimally planned for evenings and weekends when potential survey respondents are most likely to be available.

B. Qualifications, Related Experience and References of Offeror

About Research America

Research America possesses extensive depth of experience, expertise and knowledge in:

- Methodology, Questionnaire and Sample Design
- Qualitative Research Methods, Recruiting and Moderation
- Quantitative Data Collection Services

- Data Tabulation
- Advanced Statistical Analysis
- Report Design and Preparation
- Live Presentation to Client Stakeholders

Financial Stability; Foundations for Growth and Investment

RAI provides clients the critical insights and knowledge needed to navigate the most complex decisions and challenges. Our purpose is to help clients go further in achieving their mission by harnessing the power of research to propel knowledge and action. We approach client relationships as collaborative partnerships and provide research and consulting solutions that are custom-designed to ensure they meet the unique needs of each client. We leverage our diverse experience and take influences from the social sciences, design (creative problem solving and design thinking), and industry best practices.

Research America has grown substantially during the past ten years, expanding beyond our headquarters' region in the Philadelphia metropolitan area to include twelve client resource centers across the United States. Over the past several years, RAI has acquired a dozen best-in-class full-service market research companies and integrated people, technologies and processes into a single cohesive team. Our full-time staff includes more than 50 senior-level qualitative and quantitative market research professionals who have dedicated their careers to building insights for organizations. They are supported by 250 research staff members including project managers, supervisors, recruiters, interviewers, programmers as well as IT and administrative support personnel. RAI has five centralized call centers, each with full-time supervision and state-of-the art, integrated telephone and web data collection software. The web software provides respondents with a positive user experience when completing surveys, even on their smartphones. This is a crucial tool to providing statistically representative samples in today's environment, where many young adults prefer on-line communications.

Cornerstones to the RAI organization include our investments in technologies, research processes that are thoughtfully designed to produce quality results delivered efficiently and consistently, the agility to adapt to change and exceed clients' expectations, and our people. The RAI staff is a highly skilled team, accomplished in market research methods and across the client sectors we service with a depth of experience few companies can provide.

What Sets Research America Apart?

Our differentiator is our mindset. We are explorers who embrace passion, curiosity, collaboration, and a "take action" mentality that fuels our work; and clients tell us they love it through the most thoughtful expression – hiring us again.

Relevant RAI Experience for University of Mary Washington

Specific to projects of interest for UMW, RAI has provided services in public research *and* public health for decades. RAI conducts quantitative and qualitative research among citizens on a variety of topics of public interest and concern, including issues related to political polling, election/ voter issues, use of public space and resources, community health, government services, public water and energy utility services, public transportation, state lotteries, casino gambling, library systems, and government-sponsored employment services.

A Representative List of Current Clients

The following list provides a representative sample of Research America's current projects and most recent client account activity.

Client	Years of Relationship
University of Virginia	2
Columbia Gas of Virginia	9
Fauquier County (VA) Public Library	2
Prince William County Service Authority	3
University of Virginia Health System	3
Emory University	1
Marist Institute of Public Opinion	2
Marshall University	12
University of Tennessee	6
City of Bellevue	6
State of Montana	6
State of Vermont	1
Tulchin Research (Public Opinion Polling)	10
St. Luke's University (PA) Health Network	4
University of North Carolina Healthcare	4
West Virginia University Medicine	6
Children's National Medical Center	3
GlaxoSmithKline	32
Pfizer Consumer Health	24
Amtrak	22
Centre Area Transport Authority (serving Penn State University, State College, PA)	3
Metropolitan Transportation Commission	6
Metropolitan Washington Airports Authority	3
CNH Industrial	32
Exelon	26
First Energy Corporation	15
Philadelphia Gas Works	15
Little Caesars	18
Mondelez	17

Additional past RAI experience working on behalf of universities includes the following institutions: University of Pennsylvania, Penn State University, Villanova University, Shippensburg University, Johns Hopkins University and University of Maryland.

Experience and Representative Samples of Similar Work

RAI leverages experiences across industries to enhance the value of its work in others. For example, we have brought techniques from consumer-packaged goods to work with our clients in public sectors such as higher education, state lotteries, and public health.

On the following pages, we have included several examples that begin to demonstrate our work in more detail. This sampling of work is from a range of organizations including higher education and government (library, transportation authority).

Of particular note, related to the UMW's RFP, is an existing similar contract currently in place between Research America, Inc. and the University of Virginia. This contract was executed on September 1, 2017 and provides provisions and pricing arrangements for RAI to provide marketing research services for UVA on an as needed basis through 2024.

Political-Based Survey Experience
RAI conducts over 100,000 surveys annually on government election issues. This work covers multiple research objectives including political polling, public opinion on election issues and predicting voter turnout. In 2017 alone, RAI conducted more than 100 studies at national, state and local levels. We conduct this research for various clients including political campaigns, polling companies, public opinion centers of major universities and interested third parties.

Case Studies

Two case studies are provided as examples of our public opinion research experience. Both projects had high visibility and interest among their respective state and county lawmakers and citizens.

State Parks Attitude and Opinion Survey

Challenge: A state government, Department of Natural Resources is responsible for managing its state park resources and accountable to both lawmakers and the citizenry. The Department develops short-term and long-range plans to meet the current and anticipated needs of citizens. In an era of reduced and limited budgets, information and opinions from taxpayers were required to support planning initiatives and funding requests.

Our Work: RAI was commissioned to conduct a study among citizens to determine state park usage; opinions and satisfaction with state parks used and associated services; and opinions on the mission, services, and responsibilities of the state parks including the future allocation of state park resources. The study surveyed 1,600 adult state citizens, sampled to be representative of the geographic, demographic and socioeconomic profile of the state's population. It was designed for telephone data collection among a representative RDD landline sample and random sample of active cellular phones with screening to establish residency. Based on the anticipated lower response rate among adults under 35 years of age (even on cell phone), RAI recommended and the client approved, a supplemental sample of interviews conducted by web, among adults in this age segment. This sample provided a broader representation of this age segment than could be cost-effectively attained using only telephone.

Result: The Department of Natural Resources used the results of the study to understand the needs of the citizenry, inform communications with state lawmakers and citizens, and recommend priorities for resource allocation and budget requests.

Fauquier County (VA) Public Library – Needs Assessment and Satisfaction Research

Challenge: The Fauquier County Public Library provides a basic government service, provides resources and programs that seek to inform, enrich, and entertain every member of our society. To accomplish its mission and support Library recommendations and budget requests for major capital expenditures, the Library required input from the citizens of Fauquier County, including residents and community leaders.

Our Work: RAI collaborated with the Library to design the research, execute the study and provide an in-depth report of study results and recommendations. RAI facilitated a focus group among community leaders to also inform the design and survey instruments. The survey was customized with common questions as well as segment specific question sequences of current public library users, past library users and the broader population of county residents not using library services. The objectives were to determine awareness, knowledge, and use of library services, reasons for non-use, satisfaction with library services, identify unmet needs and determine interest in an array of possible new services. Data collection modes included an in-person focus group, online web surveys using PC or smartphone, telephone interviews, and print surveys. A total of 1600 survey respondents was attained.

Result: The library director, Mrs. Maria Del Rosso called it "the first comprehensive assessment of library services undertaken in Fauquier County." The library board and staff are revising the library's five-year plan to reflect survey findings. The results are also being used to plan a new Warrenton library. Study results were published publicly and can be found at the following link:
http://www.fauquiernow.com/index.php/fauquier_news/article/fauquier-public-library-highly-valued-survey-says-2017

Other Project Summaries

Examples of other projects highlighting RAI's public opinion research capabilities follow:

The University of Virginia – Multi-Phase Financial Aid and Student Recruitment Research
RAI supported the learning goals of the University to appeal to future leaders and top-performing underrepresented students while protecting and enhancing the UVA brand. Work included: 1) guidance counselor focus group; 2) ASQ data analysis; 3) qualitative research with parents and students; 4) an online survey with parents and teens across the state of Virginia.

The University of Virginia Health System – Quantitative Cobranding Concept Test
University of Virginia Health System and Novant Health engaged RAI for assistance in determining the best cobranding strategy as they look at expanding into the Northern Virginia market. The study was completed as a telephone study targeted to a primary market area in Northern Virginia.

Transportation Commission Attitude and Opinion Survey

RAI developed a web and telephone campaign for a regional transportation commission which gathered area motorists' input assessing cell phone saturation and freeway usage habits. The survey results helped the commission better understand motorist behavior. This information optimized the commission's Call Box and 511 Motorist Aid programs. RAI designed, administered, collected and analyzed the data, and created a report for the survey among a sample of area drivers within the region. This study sampled approximately 3,600 drivers stratified by county.

C. References

Maria Del Rosso, Director Fauquier County Public Library Warrenton, VA 20186 Tel: 540-422-8501 Email: maria.delrosso@fauquiercounty.gov
Carol P. Keese Associate Vice President, Marketing University of Virginia 400 Ray C. Hunt Drive P.O. Box 400229 Charlottesville, VA 22904-4229 Tel: 434 924 3909 Email: cpl9m@eservices.virginia.edu
Jacqueline K. Sheader, Public Relations Manager Centre Area Transportation Authority 2081 West Whitehall Road State College, PA 16801 Tel: (814) 238-CATA (2282) ext. 5141 Email: jsheader@catabus.com

D. Memberships and Professional Associations

Research America’s staff is active in a number of professional trade associations and have served these organizations as officers, committee members, and conference chairs. Memberships are currently held by RAI staff on the following organizations:

- American Marketing Association (AMA)
- Insights Association (formerly CASRO/ MRA)
- Pharmaceutical Marketing Research Group (PMRG)

2. Work Plan

A. RAI Approach Overview

Research America offers UMW CATI expertise in landline and mobile phone data collection. RAI's CATI surveys collect data used in:

- Public opinion polls at the national, state and local/ metropolitan area levels
- Community health surveys
- Consumer satisfaction surveys for public agency and private clients
- Awareness surveys

B. Approach to Meet UMW Statement of Needs

All services related to this proposal will be provided assuming the criteria required by the client within its Request for Proposal. If specified needs from the RFP are not reiterated in this Proposal, the Client can still assume they are included as part of this Proposal, including associated costs. RAI agrees to the terms of the RFP as outlined.

RAI's research team specializes in political polling; public opinion; awareness attitude and usage; and customer satisfaction research, among others. All facets of the project will be conducted by RAI employees and within RAI owned and supervised centralized facilities.

The following outlines the process by which RAI proposes to meet the requirements for conducting and completing the annual survey of Virginia residents.

Sampling

RAI will be responsible for sample development, based on specifications set by the University. As presently understood, WMU requires a representative sample of 1,000 adult Virginia residents. To accomplish this objective, telephone-based samples will be developed to include both household landline phones and cellular phones. The samples will be randomly selected. RAI will use State population estimates to weight/ balance the data to best represent the study results to reflect the State population.

Two samples will be developed, one for landline phones and the other for cellular phones. The landline sample will be generated through random generation of telephone numbers (RDD) from within working telephone exchanges across state area codes. The cellular sample will be developed randomly from geographically targeted, active cell phone numbers. The sample quantities will be drawn, and quotas set, to achieve the required balance of landline (35%) and cellular (65%) phone interviews. Requirements of all residential samples provided by RAI will be agreed to with the client in advance of the data collection start. As required, quotations can be provided based on UMW modifications to residential sample requirements.

Programming

As presently understood, RAI will be responsible for programming the survey, as provided by WMU. The survey will only be administered in English.

Prior to programming, RAI's senior team will review the questionnaire and offer recommendations to ensure the questionnaire and CATI program collect the highest quality data. Research America programs survey instruments of varying complexities. Our programmers can include both standard and more complex questioning, including statistically driven multi-variate data collection programs.

The programmed questionnaire will be thoroughly reviewed and tested to ensure it matches the approved questionnaire. Prior to full study rollout, it will be pretested with live respondents to ensure it is working properly and questions are correctly collecting the desired information.

Telephone Data Collection

All interviewing will be conducted by RAI employees within centralized RAI owned and supervised facilities within the United States. While this project only requires English language interviewing, RAI offers data collection capabilities in many languages. See ***Appendix 5: Multilingual Interviewing*** for more details.

RAI's team of telephone interviews goes through extensive initial and ongoing training and is highly experienced in administering public opinion surveys and political polling. In 2017 alone, RAI interviewers conducted over 100,000 surveys among registered voters using national, statewide, and voting district samples, in addition to RDD samples on various public issues.

RAI uses random and constant interview monitoring as well as interviewer debriefing sessions to ensure quality. All interviews are recorded, with respondent permission, and randomly reviewed as a further resource to ensure data quality. Collected data is then 100% edited for logic and completeness.

Further data collection quality controls include:

- Survey-specific QA checklists are required before any interviewing commences.
- Live briefing of all interviewers by the project director.
- Intensive interviewer training is conducted before survey launch. Interviewers are trained in question-by-question specifications, scripted introductions, and probing techniques.
- Preprogrammed logic and programming logic reviews of collected data.

Consumer/ residential interviewing takes place primarily during weekday evenings and weekend day and evening hours, times when the vast majority of individuals are available. Interviewers will place follow-up calls at alternating times from the original call to unavailable respondents. Generally, up to four call attempts will be made to reach survey respondents. Those reached, but unavailable to complete the interview at the time of call will be scheduled for callbacks at their preferred day/time.

In consumer/ residential surveys, the data collection process employs an industry accepted algorithm for selecting the adult resident within a household to be interviewed, in cases of households with more than one adult. The algorithm ensures proper representation of adult household members less likely to answer the telephone.

Dialing Technology Usage

RAI will utilize predictive dialers only at the client's preference.

Research America complies with all Federal Regulations for mobile phone contact. Please see ***Appendix 3: Procedures for Contacting Mobile Telephones*** for information and RAI's process for contacts to mobile telephones.

Capacity

Research America can comfortably accommodate the expected annual projected volume. Using our multiple call centers, we can quickly program, pre-test and administrate the anticipated workload.

Coding

The RFP does not include any request for coding of open-end responses. Should it be requested, RAI offers this service with a trained internal coding staff.

Data Weighting

After completing data collection, Research America will use State of Virginia population estimates to assist in sample balancing (raking) and weighting. These will include population estimates based on gender, age, race/ ethnicity, household telephone usage, and education.

Response rates are expected to vary between subpopulations from actual population demographics. In consultation with WMU, RAI will use accepted industry techniques appropriate for multi-variate sample balancing (e.g., rim weighting) to align the final data results with the broader population. Each respondent will be assigned a "data weight" based on the combination of variables from their demographic profile.

Data File Preparation and Reporting

Within three days of final data collection, RAI will submit a complete annotated questionnaire with topline results. Additionally, RAI will provide collected, cleaned data, labeled with the appropriate values and variables. RAI will deliver a data dictionary, along with a full call record. The call record will include the final disposition and all open-ended responses. RAI will present all deliverables in standard document formats (e.g., SPSS) compatible with UMW requirements.

C. Deliverables

Project Management Deliverables

RAI will provide a summary statement explaining the methodology employed in the project. The summary statement will be shared with UMW at the study's conclusion and include:

- Descriptions of interviewer training for the individual project.
- Reports and results from pre-testing.
- A list of interviewing dates.
- Survey response rates based on standard formulas set by Insights Association (formerly CASRO/MRA)/AAPOR formulas.

Additionally, during the project's term, the project manager will deliver services that inform UMW about all significant milestones reached during the project, including reporting response trends and feedback from interviewers. Your project manager will advise regarding sampling error and any unknown problems involving interview content and execution.

General Data Deliverables

Within three business days of final data collection RAI's project manager will provide UMW with cleaned, labeled data in SPSS, weighted to population parameters. Included will be full verbatim records for each open-ended response.

RAI will also provide the University with an annotated questionnaire with topline results and a *Likely Voter Index.*

D. Work Schedule - Timeline

RAI prides itself on completing projects with the utmost quality and in a timely manner. Our large data collection capacity allows us to expedite schedules to meet client needs. From the point the questionnaire is finalized, approximately 5-7 business days should be provided for programming and pretesting and program finalization.

Once materials are client approved, RAI will complete data collection in five business days. A clean data file will be provided in SPSS within three business days after completing data collection.

E. Project Development Process

Procedures and Responsibilities for Further Project Development:

The following are stages in the project development and design between the Client and Research America:

1. Initial Client Meetings
2. Methodology, Survey and Sampling Design
3. Pre-testing / Analysis of Pretest / Refining Design and Administration Processes

Initial Client Meetings:

RAI will meet in-person with the UMW Client leadership team to review project objectives, client background, previous experience and challenges, available client materials, identify client / consultant personnel involved and their roles, organize lines of communication, review timelines, deliverables, and budget. The review of the project objectives will define the population segments of interest and provide an understanding of the objectives unique to each segment and common across segments. The outcomes of the meeting(s) will include providing RAI with information required to move forward with survey and sample design and a list of next steps / actions for both the UMW and RAI. Subsequent in-person and/or telephone meetings will be used to further refine the project.

Methodology, Survey and Sampling Design:

Following initial meetings and exchanging of materials, the RAI project team will further refine the recommended methodology and specifics of the survey administration process. This will include survey design / refinements based on discussions and materials provided. RAI will then submit documents to the client for review and comment including a summary and details of our recommended methodology, sample design and administration process. This will include design/refinement of the surveys to be administered to each targeted population.

Through a combination of in-person meetings, telephone conferences and email correspondence, Client' staff will share their review, comments and suggestions and collaborate with the RAI team to refine the methodology, processes and materials. The RAI project team will generate a second draft of all materials and submit to the client for review and then meet with the client to make final refinements and receive approval.

Pre-testing / Analysis of Pretest / Refining Design and Administration Processes:

Pretesting will be designed to evaluate and make recommendations on the administration process for the resident survey. The results of the pre-test will provide input for survey, sampling and data collection process refinements. The pre-test process will simulate full administration including the sampling, survey programming, recruiting, question presentation and tabulation of responses.

RAI and the Client will collaborate to analyze all pre-test results and agree on modifications to the methodology including sample design, survey recruitment / administration processes and questionnaire refinements. RAI will modify materials for full project rollout.

Privacy, Confidentiality and Data Security:

RAI follows all industry established protocols for privacy, confidentiality and data security and complies with all HIPAA requirements.

Our organization has passed numerous audits of TCP and data security required by various financial institutions, healthcare organizations and other entities where personal identification information would be at risk.

Physical Security:

RAI has a secure key-accessed mail box for USPS deliveries. Authorized personnel retrieve the mail and all surveys are opened and scanned in a locked processing center. After data processing, hard copies are stored in a locked cabinet within the processing center.

Project materials will be stored for five years after results are delivered to the client or a requested third party by a date requested by the client, whichever is later. These hard copies will be stored in a locked cabinet within a locked storage area in our facility.

Electronic Security Procedures/Data Security:

To ensure the security of personal identifiable information, survey questionnaires, recorded interviews and sample files, RAI is protected by a hardware firewall, as well as software firewall, on all servers. Databases and file storage are segregated from the rest of the network and are only accessible to privileged IT personnel. Normal network users and applications have no direct access to databases, recordings or data files. Where appropriate, authorized RAI personnel are granted access to contact data through the CATI system. All privileged events are logged. The RAI hardware firewall has an IDS/IPS sub-system which is active, updated and monitored. All RAI offsite backups are fully encrypted using a 256-bit AES algorithm.

F. Subcontractors

Research America does not anticipate hiring subcontractors for any significant portion of the work which will be required by UMW.

G. E-Verify Participation

To comply with E-Verify requirements outlined within UMW's RFP, RAI will enroll our Sacramento, Rochester, Newtown Square and Philadelphia client services centers in this program.

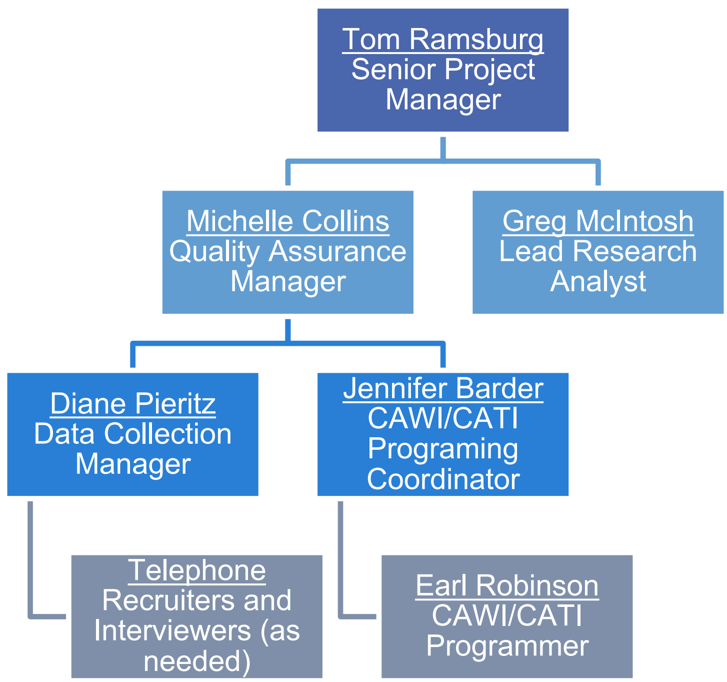
Research America's Cincinnati qualitative research center is enrolled in E-Verify, with more locations to follow as client-need requires.

H. SWaM Commitment

Research America shares the University's commitment to empowering women and minority small business owners. If and when necessary, RAI will reach out to SWaM business partners to fulfill supportive tasks related to specific UMW projects. RAI will draw from its relationships with Virginia business services support companies, including, copywriters, graphic designers, printing and mailing providers, translation services, staffing services, focus group and interviewing center hosting facilities, and other businesses which support marketing research activities.

I. Proposed Staffing and Project Organization

Your team will include the following team members:



Tom Ramsburg, Senior Project Manager

Thomas M. Ramsburg previously founded and led TMR, Inc., company for 28 years. As an expert in brand research and analytics, he brings over 35 years' experience in the design, implementation, management, and presentation of customized marketing research projects to RAI.

Tom has served as a project manager and operations director for Chilton Research, working on various projects for the CDC, DOI, DOL, as well as other social science projects. He is active in both the American Marketing Association and the Marketing Research Association, having served as President of the NYNE Chapter of the MRA and as a speaker at numerous national conferences.

Education: B.S., Shippensburg University; MBA, Temple University

Gregory J. McIntosh, Lead Research Analyst

Greg has over 30 years' experience in designing and managing customized marketing research studies. As founding partner at HaldyMcIntosh & Associates, he led account and project management efforts as a VP in two other full-service marketing research firms. Greg's marketing research expertise encompasses both qualitative and quantitative design with a core competency in quantitative market research. Greg has experience across multiple industries, most notably: Pharmaceuticals, Medical Education, Agri-Business and Industrial Chemicals. He has moderated traditional and mini focus groups as well as conducted one-on-one interviews nationwide. Greg has testified in U.S. District Court based on his professional research findings and has chaired the Pharmaceutical Marketing Research Group (PMRG) annual conference.

Education: B.S., Business, Marketing, Marketing Research
University of Delaware - Lerner College of Business and Economics

Michelle Collins, Quality Assurance Manager

Michelle is directly involved in quality assurance, development, coding, and project methodology, ensuring integrity of process between each marketing research client and the company. She implements training systems throughout Research America, and reviews interviewing processes.

Michelle has over twenty-five years' experience in the Marketing Research Industry, including operations management, database development, project direction and supervision. Michelle is active in both the Pharmaceutical Marketing Research Group and The Marketing Research Association. Past Vice President of the Philadelphia chapter of the Marketing Research Association.

Education: B.S., Marketing, The Pennsylvania State University

Diane Pieritz, Data Collection Manager

As manager of the Philadelphia office since 1996, Diane oversees the hiring and training of staff, and maintains the quality of work produced in the office. She works with the computer programming staff in taking projects from the initial test phase through preparing the data for final tabulation and maintains contact with internal staff and clients. Prior to joining Research America, Diane was a project director at Research Corporation in Conshohocken, Pennsylvania and the Intersearch Corporation in Horsham, Pennsylvania.

Education: B.A., Political Science, Boston University

Jennifer Barder, CAWI/ CATI Programming Coordinator

Prior to her tenure at Research America, Jennifer was a senior programmer in marketing research for nine years at Attitude Measurement Corporation, six years as a Senior Programmer for Adelphi Research By Design in Doylestown, PA and two years as a CATI Program Manager at Braun Research. Jen's expertise extends into programming of web studies, phone studies, tabulations, and custom reporting. She is responsible for cleaning all post-interview data and making certain that all edit checks and quality systems are followed extensively. In addition to having received senior licenses for her proficiency in VOXCO programming and all MS Excel systems, she is proficient in SPSS. She completes all statistical programming to support our statistical analysis staff.

Education: B.A., Business Administration, Temple University,

Earl Robinson, CATI/Web Programmer

Earl brings over 25 years of IT support experience to our Market Research CATI Programming division. Earl's responsibilities include specialized project programming to build CATI front-ends in CFMC C Survent and cross-tabulations in Quantum. He is proficient in Network Server and Linux Server operations, data integrity, security and backup protocols.

M. New and Innovative Technologies

RAI offers an array of new and advanced research tools. These tools are recommended and applied based on the research objectives and clients' needs. We include a summary of a few of these tools in ***Appendix 6: RAI Research Technology***. Of specific value to a project like the UMW Annual Survey is our hybrid data collection methodology using traditional telephone interviews and supplemented with WEB-based interviews.

The changing landscape of survey research and industry best practices direct our recommendation for WMU to consider employing the hybrid, mixed-mode methodology for the annual Virginia survey. The proposal and methodology, as outlined, assumes using only the telephone methodology to comply with the University's *Request for Proposal*; however, the hybrid methodology is offered by RAI as an alternative approach for consideration.

Despite the increase in the overall proportion of interviews completed by cell phone, without further steps, younger residents (i.e., ages 18 to 34) would be underrepresented in final results. This age demographic is more difficult to reach by telephone than those age 35 and over. The recommended additional steps include 1) quota sampling, that is, establishing a quota of interviews completed with this demographic; and, 2) second to telephone, offering residents who would not otherwise participate in a telephone-only survey, with the opportunity to complete the survey by web, either on a desktop computer or using a smartphone. RAI's integrated telephone and web data collection software optimizes the survey for smartphone administration and provides a pleasing user experience. This approach would provide a broader representation of Virginia residents than telephone alone.

N. Reporting Capabilities

RAI offers full advanced statistical analysis and reporting capabilities. These capabilities and examples are presented in ***Appendix 4: RAI Reporting and Presentation Offerings.***

5. Price Proposal

A. Project Pricing, As Presented by the UMW Request for Proposal

Costs to conduct 1,000 telephone interviews among Virginia residents, as presented in this proposal:

	Administrative Costs	Additional Costs*	Total Survey Cost
Survey Length	RAI $ Fee	RAI $ Fee	RAI $ Fee
15-17 minutes	$42,450	$3,800	**$46,250**
17-19 minutes	$44,350	$3,800	**$48,150**
19-21 minutes	$49,425	$3,800	**$53,225**
21-23 minutes	$51,325	$3,800	**$55,125**
23-25 minutes	$58,725	$3,800	**$62,525**

* Includes costs for acquisition of sample (Landline and Cell Phone) sufficient to complete 1,000 interviews.

This form is reproduced as ***Attachment A – Pricing Sheet***. It is included in the proposal forms inserted as ***Appendix 7: Proposal Attachments***.

B: Alternative Pricing Structure: (Optional) Research Design Pricing and Discussion

As mentioned earlier, RAI offers an alternative hybrid mixed-mode methodology for consideration by the University. The hybrid mixed-mode methodology would include both telephone and web-based interviews. The telephone interviews would be conducted in the same proportions of landline (35%) to cellular (65%) as requested. The remaining interviews would be conducted from internet panels. The panel selection uses an aggregate panel company that pulls consumers from dozens of different internet panels. There are numerous quality controls to insure data quality.

The benefits of the hybrid approach include broadening the population to include Virginia residents who would otherwise not participate in a telephone only survey and reducing overall study costs due to efficiencies in recruiting.

For purposes of illustration, the following pricing structure would apply to completed 500 interviews by telephone and 500 interviews by web. If there is further interest by the University, RAI can provide a quotation(s) for other sample proportion (telephone to web) designs (e.g., 750 telephone; 250 web).

Alternative Research Design Pricing

	Administrative Costs	Additional Costs*	Total Survey Cost
Survey Length	RAI $ Fee	RAI $ Fee	RAI $ Fee
15-17 minutes	**$39,625**	$2,000	**$41,625**
17-19 minutes	**$41,250**	$2,000	**$43,250**
19-21 minutes	**$45,375**	$2,000	**$47,375**
21-23 minutes	**$46,575**	$2,000	**$48,575**
23-25 minutes	**$53,250**	$2,000	**$55,250**

* Includes costs for acquisition of sample (Landline and Cell Phone) sufficient to complete 500 telephone interviews.

This form is reproduced as ***Attachment A – Pricing Sheet***. RAI has included it below the standard pricing form, as indicated by the University. The form is inserted into our proposal attachments appendix as referenced above.

Alternative Research Design Discussion

The changing landscape of survey research and industry best practices direct our recommendation for WMU to consider employing the hybrid, mixed-mode methodology for the annual Virginia survey. The proposal and methodology, as outlined, assumes using only the telephone methodology to comply with the University's Request For Proposal; however, the hybrid methodology is offered by RAI to supplement the 1,000 telephone interviews, **at no additional cost to WMU**. If requested, the final sample could include 1,000 telephone interviews and up to 100 additional interviews by web.

If WMU would use the hybrid methodology for the primary sample of 1,000 interviews, there would actually be a costs savings, due to the efficiencies of internet data collection. The impact of the savings is presented in Attachment A, following the pricing for telephone only requested approach.

Despite the increase in the overall proportion of interviews completed by cell phone, without further steps, younger residents (i.e., ages 18 to 34) would be under represented in final results. This age demographic is more difficult to reach by telephone than those age 35 and over. The recommended additional steps include 1) quota sampling, that is, establishing a quota of interviews completed with this demographic; and, 2) second to telephone, offering residents who would not otherwise participate in a telephone only survey, with the opportunity to complete the survey by web, either on a desktop computer or using a smartphone. RAI's integrated telephone and web data collection software optimizes the survey for smartphone administration and provides a pleasing user experience. This approach would provide a broader representation of Virginia residents than telephone alone.

Appendix 1: Company Details

Research America, Inc. (Federal Tax Id# 13-3135845) is a privately-owned corporation that has provided telephone survey research since 1985.

Designations: SBA Small Business, Veteran-owned Business

Headquarters:
33 Bishop Hollow Road,
Newtown Square, PA 19073
Tel: 610-356-1800

Other locations:

Cincinnati, OH	Detroit, MI	Langhorne, PA
Lehighton, PA	Lincoln, NE	Orlando, FL
Pottsville, PA	Rochester, NY	Sacramento, CA
Totowa, NJ	Willow Grove, PA	

Visit Research America's corporate website: http://www.ResearchAmericaInc.com

Appendix 2: Research America Experience

Our proposed research solution for UMW is based on CATI: Research America will develop and deliver computerized telephone interviewing surveys designed to reach consumer or business audiences. Live telephone interviewers will connect with respondents. Lists developed for UMW will include both landline and mobile phone respondents as required by each project's specifications.

We will optimize each survey instrument for successful completion. Questionnaire content and flow will be time-sensitive to respondents' needs to complete the survey effectively and quickly.

Research America's instrument design will permit benchmarking and tracking data across time: comparing new data against past iterations of survey data when it exists.

Agile Research

We are passionate about solving problems. Our staff's dynamic range in skillsets and experience make us an ideal custom and agile research partner to our clients. Throughout this proposal RAI highlights its agile research solutions and the value it will bring to UMW. As an agile research partner for various business and nonprofit organizations, RAI is prepared to perform quick-turn and iterative research projects. These may include, but are not limited to the following:

- Online Surveys
- Strategy and Ideation Facilitation
- Focus Groups
- Online Bulletin Boards & Communities
- Website Usability
- New Methods

Research America Inc. knows first-hand how much impact research data can have on making powerful decisions for an organization. However, if a careful approach to planning and analysis isn't taken, that same data can become cumbersome to include in the decision-making process. We have a defined approach that is applied to all research engagements, which aligns key stakeholders, enables accurate design and data collection, and activates data for decision making. We leverage our experience, internal and client collaboration techniques, and data visualization expertise to help teams and organizations grow their business.

The firm's structure, from its beginning through today, is intentional about placing experienced researchers on the frontlines. Every client team is carefully formed to meet the needs of the project. Each of our partners and associates bring their own set of unique skills and background, yet all were recruited based on their instinctive possession of characteristics important to researchers – an ability to see the big picture; curiosity; empathy; and strong communication skills with a flair for story-telling.

The Research America Experience:
RAI embraces a set of five values that fuel our work and relationships with clients. These values and beliefs make up our mindset. They are:

> **Integrity**: We believe in doing the right thing, earning trust in our actions and the knowledge we create for clients.
> **Curiosity**: We are intellectually curious and forever learning, trying, and experimenting - trying new things and taking calculated risks.
> **Relationship**: We respect and help one another; connecting with clients and each other in a meaningful way and investing in relationships.
> **Creativity:** We believe in new ideas and the process for arriving at new ideas; and we believe design is more important than most people think (it shows we care about the smallest details).
> **Work Ethic**: We believe in pursuing excellence in everything we do and making extra efforts to "Blow People Away."

These beliefs play out in the work we do with clients. It's experienced through our upfront learning and preparation for each meeting, our responsiveness to client requests, our willingness to push boundaries, experiment, and create.

Capacity: Management of Workload
RAI conducts 300+ projects each year, and the model has been perfected for more than three decades. Through this experience, we have developed a process for building superior teams to handle client projects. The project begins with the initial exploratory phase and understanding what the research priorities are. This is completed by the account leader and at least one other team member. From that point forward, depending on the research need, a team is assigned. The team is selected based on who can best meet the needs of the project in terms of industry expertise, methodologic expertise, and so on. The account lead and at least one other team member is always a consistent touch point for every client project.

The research team supporting UMW has a staff of 50 full-time professional researchers to provide production, back office, and field/data collection support. These are critical resources for the Insights Professionals assigned to orchestrate any of the University's research needs.

Research America Public Research Clients
Our public-sector clients primarily represent government agencies, non-profits, public research, higher education, regional healthcare systems, and utilities.

RAI performs thousands of customer experience and satisfaction surveys each month. In addition to professional telephone interviewing and web/ social media platform research tasks, we are highly experienced in delivering print and mail survey solutions. The projects we develop and administer for our clients take advantage of any or all of these methods in mixed-mode and hybrid surveys.

Experience with Businesses
RAI has conducted hundreds of business-to-business studies for over 30 years. This includes small, medium and large business respondents in various industries including manufacturing, financial services, human resource services, healthcare, insurance, construction, agriculture, information technology, etc. Included have been various studies specifically focused on human resources and interviewing human resource professionals.

Organization, Size and Structure

RAI is proud of our continued commitment to remain focused on each client. This commitment can be found in everything we do, including our flat organizational structure.

Without cumbersome layers of management, our client liaisons are able to quickly access the staff actually performing tasks critical to the success of your survey efforts. This makes it possible for rapid response to issues as they occur.

The experiences key staff members bring to the table guarantee the successful completion of your research project. Qualifications, roles and responsibilities for each individual member can be found in ***Section 2: Qualifications of Staff***

Work Processes: Custom and Agile Research Approach and Considerations

By definition, agile research requires fast and (sometimes) iterative design and execution. This flies in the face of traditional research approaches that often require long, drawn out planning and analysis. RAI often talks about the rise of technology and plethora of choice driving changing dynamics in the workplace and greater demands for data. Our agile research solutions provide a response to this new demand.

It's important, in our view, to define agile research. Because it's agile, we should not lose focus on quality. While traditional methods may not apply here, traditional thinking does – bad data leads to bad decisions. The three criteria for agile research are:

1. It's quick. It allows your organization to address a business question in a timeframe that doesn't slow down the initiative. We're often talking days, not months.
2. It's your consumer. We must always focus on targeting the study appropriately to include your consumer – demographics, geography, psychographics, etc.

3. Leveraging the right tools. Agile research requires flexible design, programming, execution, and analysis. To do this requires a balance of automation and smart, strategic thinking.
4. It's (sometimes) iterative. The hidden advantage with agile research is its ability to be iterative – where one phase builds upon another. Not every assignment is this way, but to quickly go from qualitative to quantitative in a matter of weeks changes everything about your initiative.

To enhance this, there are two critical service elements that must be present for successful agile research:

- Responsiveness – The RAI team is a well-oiled machine with senior researchers who know the importance of timely response. Our responsiveness is the best in the industry, and it's due to our teamed approach and business model. We place senior researchers on the front lines so questions are answered immediately (not passed around the organization).

- Experience – As referenced, the experience of the team plays a role in responsiveness. But, it also plays out in design. Our researchers have tools and templates built for other agile research projects that can be leveraged and customized. This experience speeds the design process and provides tested and proven work.

RAI is experienced across methodologies. Its Insights Consultants, the senior researchers on the front line, have both quantitative and qualitative experience. Some are trained and experienced moderators. This combined skillset is uncommon and enables more complete insights.

Staff Selection, Training and Supervisory Processes:

New hires are trained by an on-staff trainer. The trainer is responsible for training the new interviewer in all of the RAI and client protocols. In addition to training, interviewers are provided standard documentation and checklists before beginning the interview process.

During the course of a work day, interviewers are live monitored to ensure high quality customer service, quality and non-biased delivery of the survey instrument. Completed records are reviewed by our quality assurance department to ensure data entry accuracy and proper usage of language and grammar.

The quality assurance checks and day-to-day individual supervision provide the opportunity to continuously coach individuals based on current observations as well as quality assurance evaluations.

Interviewer profiles are reviewed, and individuals are selected based on their professional and personal experience, their unique skills, previous experience with similar surveys, and their expressed interest in the survey. Interviewer's backgrounds and qualifications vary allowing project specific teams to be created to maximize the quality of each interview.

E-Verify Participation

Research America enrolled our Cincinnati client services center in the E-Verify program during 2017. Our Cincinnati team provides qualitative research, including focus group moderation and in-depth interviewing. We will enroll telephone interviewing centers as required by clients.

Appendix 3: Procedures for Contacting Mobile Telephones

U.S. Legal Restrictions on Calling Mobile Telephone Numbers– the TCPA

Under the federal Telemarketing Consumer Protection Act of 1991 (TCPA, 47 U.S.C. 227), which is enforced by the U.S. Federal Communications Commission (FCC), automatic telephone dialing systems cannot be used to contact a cell phone without the user's "prior expressed consent" – a content-neutral requirement that applies to all calls, including survey research calls.

The TCPA defines "automatic telephone dialing system" as equipment that has the capacity to store or produce telephone numbers to be called using a random or sequential number generator, in conjunction with dialing such numbers. There is no good faith exception for inadvertent calls to cell phones. The FCC can impose monetary penalties for violation of these restrictions.

At the present time, the Marketing Research Association (MRA) is working for the benefit of the research community to amend the TCPA to exempt research calls. However, in the meantime, research call centers should only use manual dialing to reach cell phone numbers unless expressed prior consent has been received from the respondent that it is permissible to call her/him on her/his cell phone.
Research America limits the use of auto dialers so the Federal Telemarketing Consumer Protection Act law does not present any significant concerns for our organization.

Research America Mobile Calls Procedures

- Research America intends to include listed cell phone records to effectively complete this research.

    - Research America reaches the respondent completes the introduction and the respondent seems to be open to completing the survey but is concerned about using minutes on their cell phone. The interviewer will ask if there is an alternate number to reach them. Sometimes the respondent offers a landline number where we attempt to reach them to continue the survey interview.

    - Other times, the respondent will state that we reached their cell phone and decline to take the survey. We note the record as a "respondent declined" which automatically post their number to the "Do-Not-Call" list. If the respondent asked to not be called again, we post their number to the "Do- Not Call" list.

    - There are rare occasions where the respondent answers their cell phone while driving. If the interviewer can ascertain this is the situation, the interviewer will immediately state we will call back at a more convenient time and terminate the call.

- It is unlawful to contact cell phones using an automated telephone dialing system – including a random digit dialer.

Appendix 4: RAI Reporting and Presentation Offerings

In this section, we will present:

- Report Options Philosophy
- Standard Report Options Overview
- CSV or SPSS formatted files
- Real Time Email Alerts
- Customized Online Dashboards
- Executive Summary Reports
- Key Driver/Impact Analysis Reports
- Research America Value Add – Focus on Actionable Results and Reporting
- Examples of additional types of advanced analytics available

Report Options Philosophy

Research America provides optional full-service analysis and reporting allowing all our clients to choose the level of analysis and reporting support that is right for their organization. Clients with skilled analysts may choose to schedule CSV or SPSS formatted response data download and conduct their own analysis and reporting internally. A Client may also choose full support that includes all reporting options discussed below. Many of our current clients started with minimal support but moved to full service as they realized it was cost effective to leverage our expertise and resources while concentrating their analyst on their primary business needs.

Optional Standard Reports Available to the Town

Research America utilizes several different levels of reporting and reporting tools to assure that actionable information is available to our clients.

This includes:

- CSV or SPSS formatted files
- Real Time Email Alerts
- Customized Online Dashboards
- Executive Summary Reports
- Key Driver/Impact Analysis Reports

CSV and SPSS file formats

All response data as well as client supplied fields are available as a downloaded in a comma delimited format (Excel compatible). An SPSS script file may be downloaded to convert the csv file into a fully labeled SPSS file format as well.

A daily response data download file will be provided to the Town that includes all survey responses from the current day with all Town supplied data. This process can be fully automated and scheduled to run at an agreed to time overnight. The Town simply provides the preferred method of data transfer and the specific location and Research America will handle the rest.

Real Time Email Alerts

An Alert is delivered via email immediately following (within fifteen minutes of) our contact with your customer. Our unique Alerts enable immediate problem resolution—before the customer becomes "at risk".

The parameters of a real-time alert are determined by you and contain customer name, service address, contact information, in-depth description of the customer's survey results.

Although Alerts are typically far and few between, most clients find the customer relationships saved by immediately resolving the reason for the Alert actually provides the ROI to pay for their outreach program.

CUSTOMER ADVOCATE ALERT

ACME Electric Customer Satisfaction Survey

Metrix Matrix Notes:

I spoke with John. Passing information along due to low scores and additional comments.

Service Date	2011-01-11 00:00:00
Call Status	Alert
Account Number	543212345
Issue Description	High Bill Complaint
Customer Name	John Doe
Phone Number	555-555-5555
CUSTOMER TYPE	RESIDENTIAL
CONTACT REP NAME	Martin Metrix
Followup Date	2011-01-20 17:24:48
S1 - Overall Satisfaction	2
Q1 - Primary Reason	My bills are usually around eighty to one hundred month. They had a field technician come out to check things out but they are still telling me that I owe over two hundred dollars.
M1 - Recent Contact	Telephone
S2 - Wait Time for Rep	9
S3 - Rep Ability to Handle	1
S4 - Rep Professionalism	3
M2 - Request Resolved	No
Q3 - Reason Unresolved	I don't agree with the amount of the bill.
M3 - Repeat Contact	No
M4 - Field Rep Visit	Yes
S5 - Overall Satisfaction Field Service	8
S6 - Rep respect for Property	9
M5 - Present for Visit	Yes
M6 - Service Completed	Yes
Q5 - Reason Incomplete	The accuracy of our bill needs to be validated. I'm sure it's incorrect and they keep telling me there is nothing I can do.
S10 - Electric Reliability Satisfaction	10
M7 - Power Outage	No
S12 - Communication Satisfaction	10
M10 - Consider Rates	Very Reasonable
M12 - Preferred Choice to Stay Informed	Visiting the provider's website
Transcript	Survey completed by: John Doe [s3] It was very quick, the customer service rep said there is nothing I can do. It felt like she was just trying to get me off the phone. She had no interest in trying to resolve the problem. [s5-s6] The field technician was not the problem, he was great. He didn't find any problems. The issue is with my bill.

Thu Jan 20 17:40:51 2011
16264534

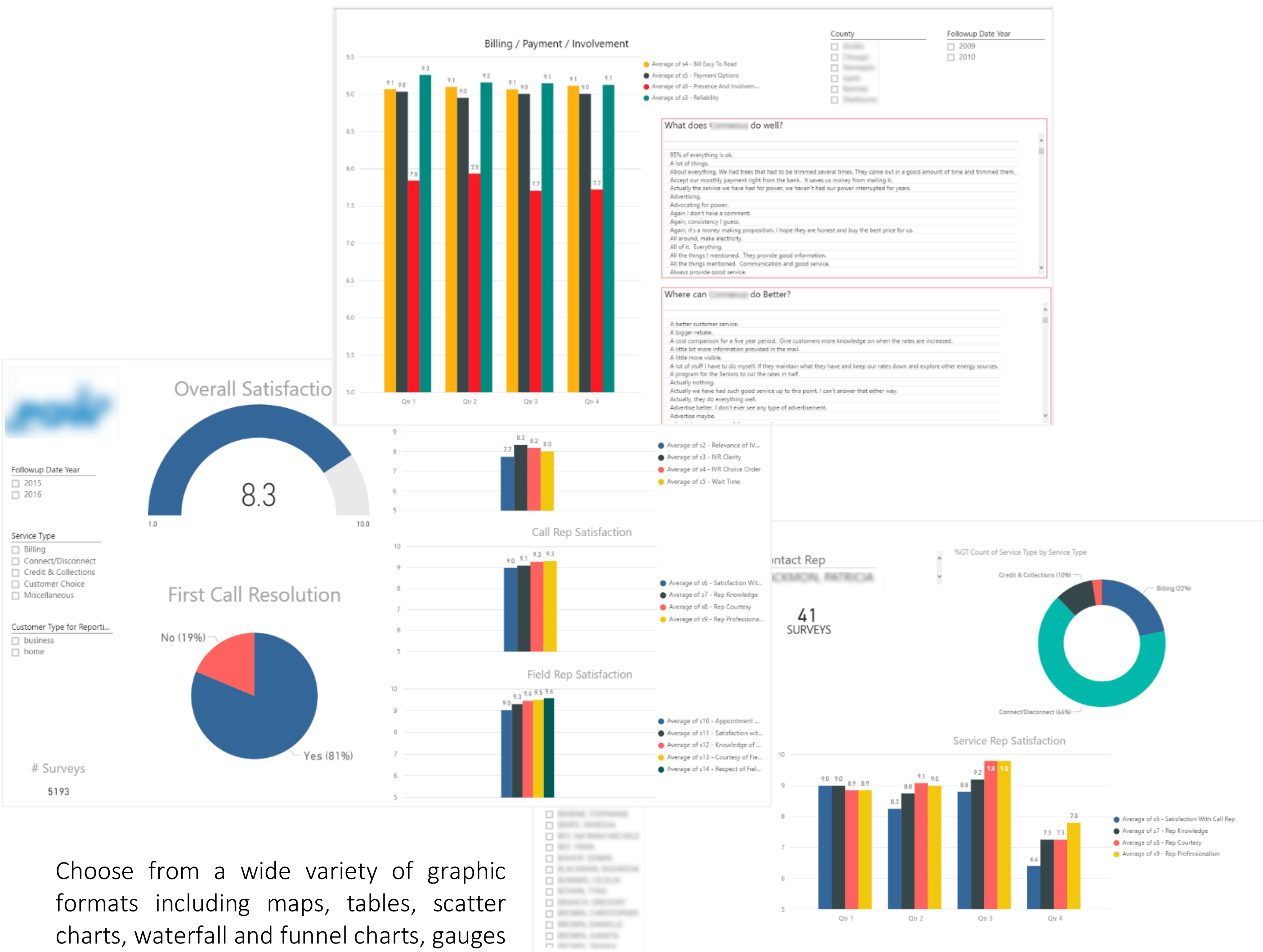
Metrix Matrix Inc.
888.865.0065

Customized Online Dashboards

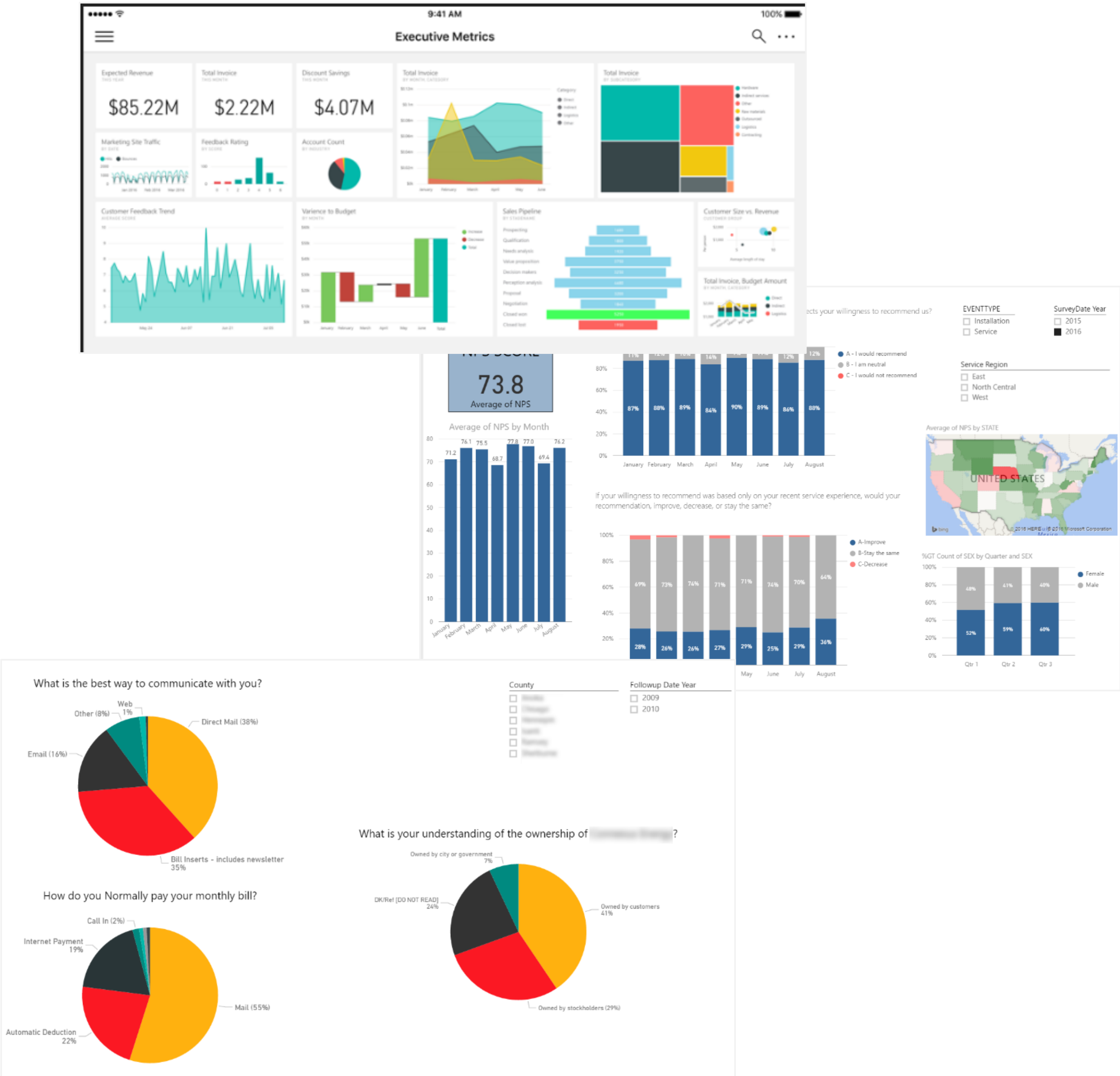
Timely information in an easy-to-understand format is key to actionable satisfaction research. Research America's customized online dashboards provides exactly that. During the setup/design phase we will work with you to develop a meaningful, easy to navigate dashboard(s) that provides your choice of summarized statistics and/or individual verbatim comments.

Leveraging Microsoft's Power BI, Research America can customize the dashboard to summarize response data and/or company provided data with filters allowing drilldown functionality. This will bring your data to life!

- Visualize your customer's responses using a simple yet power dashboard customized to meet your specific reporting needs.
- Review data overall or filter the view to a specific service area, by participant group and by location.
- You can even scroll through verbatim customer comments



Choose from a wide variety of graphic formats including maps, tables, scatter charts, waterfall and funnel charts, gauges and of course standard graphics such as pie, bar and line charts.



Executive Summary Reports

Executive Summary Reports are designed to describe the survey results, provide trending where appropriate and highlight statistically significant differences in data. Frequently purchased as monthly or quarterly reports, they are easy to understand and navigate.

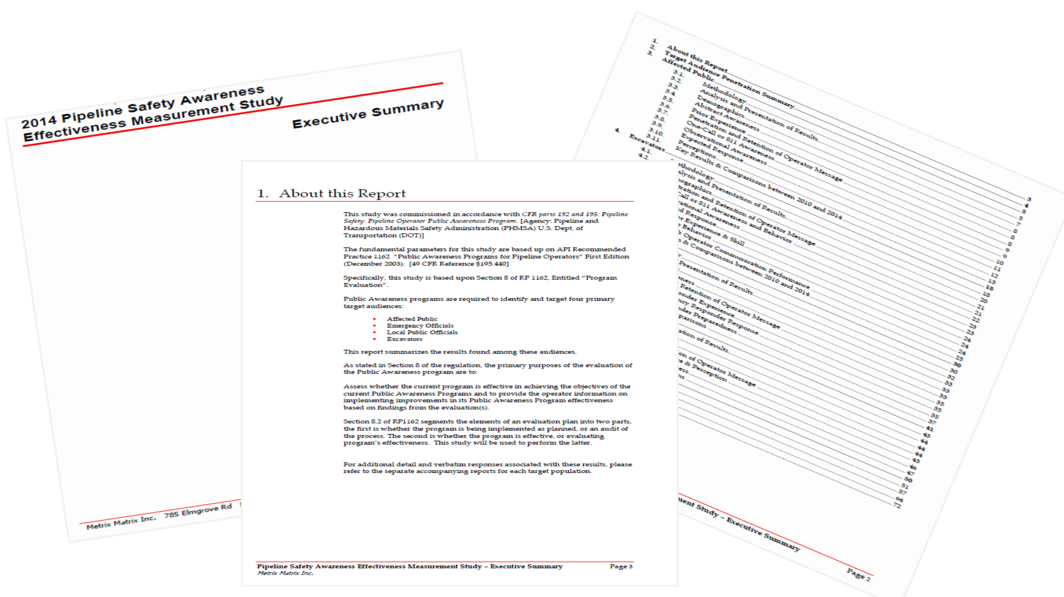
The process to create an Executive Summary report begins once the final survey is submitted and QC'ed. The final data set is downloaded and run through our proprietary data file analysis process that identifies missing data and outliers for further review. Once the data is cleaned, an analytic file is created and loaded into SPSS.

Our standard Executive Summary reporting timeline allows 7 to 10 working days from the final survey submission to report delivery that accommodates programmer analyst and professional services analyst time to process files, analyze the data and create the final report. Your account liaison provides the final proof read to ensure it meets or exceeds your expectations.

Executive Summary Reports include:

- Executive Summary narrative highlighting key findings
- Summary of results of statistical significance
- Banner tables and charts for each survey question by quarter or month
- Up to 10 additional crosstab banner tables and charts

The following excerpts were taken from recent Executive Summary Reports to serve as example of format.


2014 Pipeline Safety Awareness Effectiveness Measurement Study

Executive Summary

1. About this Report

This study was commissioned in accordance with *CFR parts 192 and 195: Pipeline Safety: Pipeline Operator Public Awareness Program*. [Agency: Pipeline and Hazardous Materials Safety Administration (PHMSA) U.S. Dept. of Transportation (DOT)]

The fundamental parameters for this study are based up on API Recommended Practice 1162 "Public Awareness Programs for Pipeline Operators" First Edition (December 2003). [49 CFR Reference §195.440]

Specifically, this study is based upon Section 8 of RP 1162, Entitled "Program Evaluation".

Public Awareness programs are required to identify and target four primary target audiences:

- Affected Public
- Emergency Officials
- Local Public Officials
- Excavators

This report summarizes the results found among these audiences.

As stated in Section 8 of the regulation, the primary purposes of the evaluation of the Public Awareness program are to:

Assess whether the current program is effective in achieving the objectives of the current Public Awareness Programs and to provide the operator information on implementing improvements in its Public Awareness Program effectiveness based on findings from the evaluation(s).

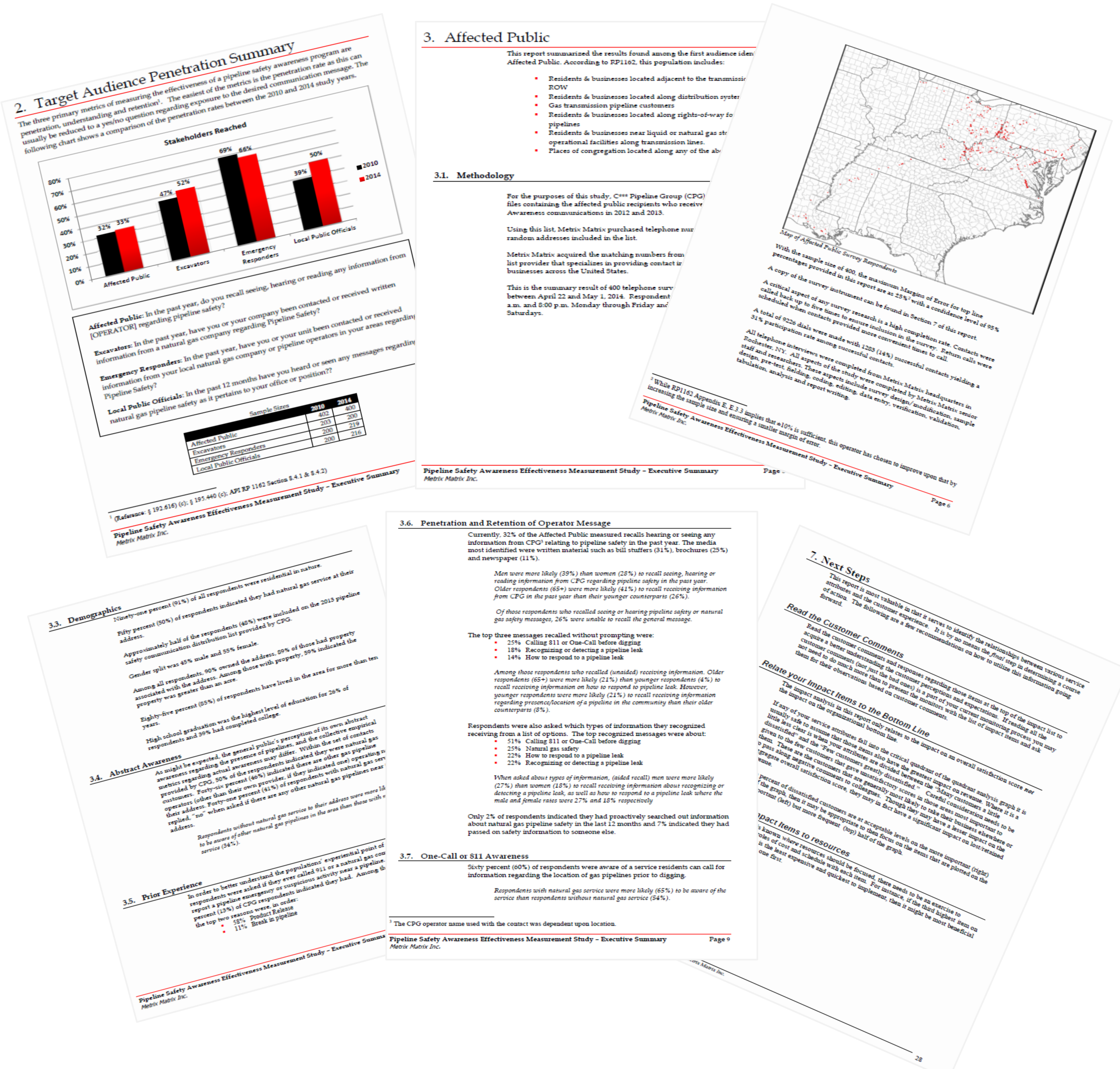
Section 8.2 of RP1162 segments the elements of an evaluation plan into two parts, the first is whether the program is being implemented as planned, or an audit of the process. The second is whether the program is effective, or evaluating program's effectiveness. This study will be used to perform the latter.

For additional detail and verbatim responses associated with these results, please refer to the separate accompanying reports for each target population.

Pipeline Safety Awareness Effectiveness Measurement Study – Executive Summary Page 3
Metrix Matrix Inc.

Executive Summary Narrative

Executive summary with key-findings and recommendations, including overall, general, and historic findings (when appropriate), statistically significant differences in total and across subgroups; Description of the study including background, purpose and methodology; Statistical Observations of Note Codification, tabulation and charting of up to five open-ended responses;



Banner tables and charts for each survey question trended over time;

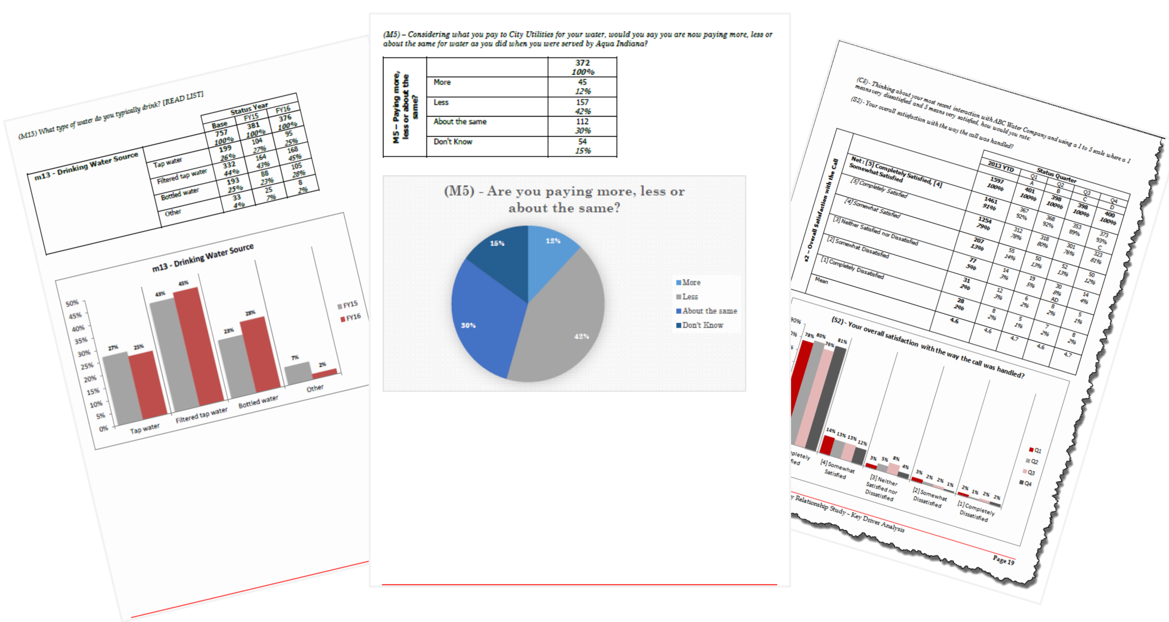


Table of verbatim comments for each open-ended question;

Up to 10 additional crosstab banner tables and charts:

(M16) Which of the following best describes your age?

m16 - Age Group		Status Quarter		
		Base	March 2015	September 2015
			A	B
		746 100%	375 100%	371 100%
	Teens	2 *	- -	2 1%
	Twenties	42 6%	24 6%	18 5%
	Thirties	77 10%	37 10%	40 11%
	Combine : {Teens, Twenties, Thirties}	121 16%	61 16%	60 16%
	Forties	95 13%	43 11%	52 14%
	Fifties	146 20%	73 19%	73 20%
	Combine : {Forties, Fifties}	241 32%	116 31%	125 34%
	Sixties	176 24%	86 23%	90 24%
	Seventies	154 21%	80 21%	74 20%
	Combine : {Sixties, Seventies}	330 44%	166 44%	164 44%
	Eighties	47 6%	26 7%	21 6%
	Nineties	6 1%	5 1%	1 *
	Over 100	1 *	1 *	- -
	Combine : {Eighties, Nineties, Over 100}	54 7%	32 9%	22 6%

Key Driver/Impact Analysis

The real value of this report originates from knowing the impact and the level of importance each measured attribute has on overall satisfaction. Armed with this report, managers can make informed investment decisions knowing the potential impact on customer satisfaction.

Key Driver/Impact Analysis Reports use advanced statistical analysis to rate and rank key attributes in order of influence, importance, and impact on satisfaction. Critical to both strategic and tactical planning, this report allows organizations to make fact-based decisions when prioritizing improvement plans. This highly actionable report includes an executive level narrative highlighting the key drivers of customer satisfaction as well as statistically significant differences found in the data. A qualitative analysis of verbatim responses to two or three open-ended questions enhances insights on current or future concerns. Frequency tables and charts are provided for each question. Up to three cross tabs are provided for key questions.

Key Driver reports are typically purchased annually though some of our clients with highest satisfaction purchase these reports semi-annually or quarterly. We anticipate the Town may opt for multiple Key Driver reports, possibility by subsidiary or maybe service for the larger services.

The process to create a Key Driver report begins once the final survey is submitted and QC'ed. The final data set is downloaded and run through our proprietary data file analysis process that identifies missing data and outliers for further review. Once the data is cleansed, an analytic file is created and loaded into SPSS. Details of our analytic approach are considered confidential but have been certified as statistically sound by reputable statistical consults specializing in applied statistical analysis.

Our standard Key Driver reporting timeline allows three weeks from the final survey submission to delivery that accommodates programmer analyst and professional services analyst time to process files and draft the analysis, and senior level professional services review before finalizing the report. Your account liaison provides the final proof read to ensure it meets or exceeds your expectations.

The report includes:

- Executive Summary with key-findings and recommendations
- Statistical Significance and Regression Analysis where appropriate
- Dissatisfaction with each attribute measured
- Importance level of each attribute
- Impact of each attribute on Overall Satisfaction or Loyalty
- Methodology
- Qualitative Analysis including codification, tabulation and charting of two open-ended responses

In addition to the sample pages found in an Executive Summary, the Key Driver Report also includes pages with the following information:

Importance, Dis-satisfiers and Impact – the three most important elements to understand what is driving your customer's overall satisfaction.

Which attributes are more important, or, tend to have a larger influence on an individual respondent's overall satisfaction with XYZ's Service?

- Courtesy of the call representative
- Overall Satisfaction with the solution
- Knowledge of the call representative

Which attributes most frequently produced dissatisfaction?

- Whether or not it was their first contact for the request
- Reasonableness of rates
- Wait Time

Which attributes (or their perception) if improved, would most likely contribute to a higher level of overall satisfaction across the customer base?

- Reasonableness of rates
- Resolving the request with one call/ visit
- Overall Satisfaction with the resolution

Research America's Key Driver report allows you to focus your improvement efforts on those attributes that will have the greatest IMPACT on satisfaction, rather than spending time and resources addressing DISSATisfiers that have little or no measurable impact on satisfaction.

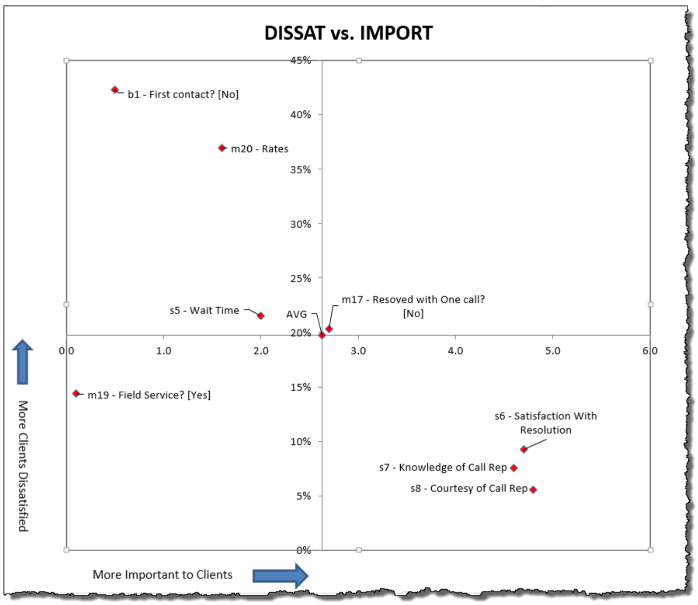
4. Impact Results

Eight attributes were considered in the Impact Analysis regarding customers' overall satisfaction.

The following table is sorted in IMPACT order with those attributes at the top of the list having the greatest impact on overall satisfaction across the measured population.

IMPACT TABLE

ATTRIBUTE	IMPORT	DISSAT	IMPACT
m16 - Rate Description	2.0	14.4%	13.2
s3 - Being Trustworthy and Fair	3.0	8.6%	11.8
s8 - Ease of Understanding Bill	1.8	12.0%	9.9
m15 - Receiving Good Value?	1.7	12.5%	9.8
s5 - Commitment to Upkeep	2.3	9.1%	9.6
s2 - Efficiency of Operations	2.7	7.0%	8.7
s4 - Courtesy and Helpfulness of Employees	2.9	6.5%	8.7
s7 - Commitment to Watershed	1.8	8.9%	7.3
s9 - Payment Options	2.2	6.5%	6.6
s6 - School Involvement	2.0	6.3%	5.7
m11 - Satisfied with Water Taste and Clarity?	0.7	12.0%	3.9
m14 - Aware of Online Bill Payment? [1]	0.6	11.7%	3.2
m17 - Contacted SA in last 3 months?	0.2	17.5%	1.6
AVG*	**1.8**	**10.2%**	**7.7**



Presenting information in a variety of formats improves the actionability of our reports by communicating to readers in formats they are most comfortable with. Providing narratives, Graphs and Charts, Tables and even Quadrant charts.

Appendix 5: Multilingual Interviewing

Many areas in Virginia, the southeastern US, and other US geographies have a high population of non-English native language residents, with Spanish representing the majority of different languages spoken. Research America has multilingual interviewers available for many minority languages and dialect varieties of languages spoken across the US. RAI can utilize multi-lingual interviewers where necessary, to conduct these interviews in languages other than English, ensuring participation of non-English fluent respondents.

Multilingual Research Execution services include, but are not limited to:

- Survey programming and pre-testing (online and telephone, with Spanish and other multilingual options)
- Mail production, distribution, and processing
- Telephone interview (including interviewing in Spanish, Chinese and other languages)
- Project management and regular status updates (frequency as directed the client)

Appendix 6: RAI Research Technology

Marketview 360° ™
Get a real ROI for more than your money's worth

Our highly refined expertly implemented Market Measurement program gets actionable results!

Incorporating our CAPR (Competitive Assessment Positioning Radar) and Gap Analysis - MarketView 360™ takes a fresh look at your company, a renewed look at your competitive environment, market trends, your internal alignment and your sales and marketing initiatives to:

Map your current market position against competitors
Prioritize target markets for growth
Isolate gaps or weak areas that you can refocus and refine internally
Reveal strategies to increase the effectiveness of your marketing communications efforts
At the end of the day, we will provide the "so what?" - we tell you what it means and how to act upon it!

MapTrac ™
Don't waste your advertising dollars! Use MapTrac™ for precise targeting!

Each year companies waste millions of dollars on "shot gun" advertising and marketing campaigns "hoping" for a hit. Guessing at who may buy your product or service and where you can find them takes time, money and sales resources. Our MapTrac™ program was designed specifically to help companies maximize their advertising and marketing investment by targeting your "optimum" customer in the most efficient way. How do we do this? First, we research to understand what your current customers "look like" – Who are they? What is their lifestyle, their profile? Then we overlay this on any market you are targeting– national, regional, local, even a 1-mile trade area - to uncover prospects who look just like your best customers. The result?... A focused pool of like prospects for higher sales conversion, stronger ROI for your advertising dollars and faster growth momentum.

In Touch Now ™

Maximize what you've got…you already know them!

Maximizing relationships with customers, suppliers and employees is the key to long-term business success in today's intensely competitive marketplace!

Research America' Relationship Mapping program will:

- Measure current customer "mind share"
- Map your market opportunities with customers and prospects
- Identify weaknesses in your sales and customer communication
- Isolate key performance issues that strengthen or deflate your customer relationships
- Pinpoint gaps that cause defection
- Prioritize your opportunities for market share gain
- Refocus your internal processes to support company vision (marketing strategies, customer service guidelines, engineering and development procedures, management guidelines).

DashView ™

"Picture" your growth... anytime... anywhere!

Research America' DashView™ product offers the ability to "see" market intelligence at a glance – so you can view and track market opportunity data on-line, anytime, anywhere!

DashView™ pages are designed and customized for your organization whether you are focused on geographic sales growth, market share growth, marketing campaign effectiveness, tracking competitive share, brand awareness or all of the above.

1. Track data globally, regionally, by market, or product segments
2. Link market data for comparatives (gov't, demographics, financial, consumer confidence, business confidence, commodity pricing, exports, etc.)
3. Set-up alert signals for competitive or operational risk situations
4. Drill-down behind the graphs for more detail
5. Measure sales opportunity (or competitive risk) geographically (global to local)
6. Monitor your successes by products or marketing campaigns (events, direct mail, advertising)

Appendix 7: Proposal Attachments

The following documents are attached to this proposal but are not included in the document page count.

Proposal Forms

Required forms for University of Mary Washington are attached following this page.

- ✓ Attachment A – Pricing Sheet
- ✓ Attachment B – References
- ✓ Attachment C – Small Business Subcontracting Plan
- ✓ Appendix II: Invoicing and Payment
- ✓ Appendix III: Exceptions
- ✓ Any/All signed addenda.

ATTACHMENT A - PRICING SHEET

Please provide pricing per the survey specifications listed in the RFP for the following ranges of possible survey lengths and any other additional costs.

Description	Administrative Costs	Any Additional Costs (please describe)	Total Survey Cost
Survey Length 15-17 minutes	$42,450	$3,800	$46,250
Survey Length 17-19 minutes	$44,350	$3,800	$48,150
Survey Length 19-21 minutes	$49,425	$3,800	$53,225
Survey Length 21-23 minutes	$51,325	$3,800	$55,125
Survey Length 23-25 minutes	$58,725	$3,800	$62,525

Evaluation of price will be the "Total Annual Survey Cost" based on the following scenario:

- Sample size n=1000 Virginia residents
- 35% of interviews shall be completed via landline
- 65% of interviews shall be completed via cellular
- Survey length of 15 minutes

If the vendor's standard pricing is based on a different pricing structure than above, please submit the alternate pricing structure based on the scenario above.

Alternative Research Design Pricing (Please see Page 20-21 of Proposal.)

	Administrative Costs	Additional Costs*	Total Survey Cost
Survey Length	RAI $ Fee	RAI $ Fee	RAI $ Fee
15-17 minutes	**$39,625**	$2,000	**$41,625**
17-19 minutes	**$41,250**	$2,000	**$43,250**
19-21 minutes	**$45,375**	$2,000	**$47,375**
21-23 minutes	**$46,575**	$2,000	**$48,575**
23-25 minutes	**$53,250**	$2,000	**$55,250**

* Includes costs for acquisition of sample (Landline and Cell Phone) sufficient to complete 500 telephone interviews.

ATTACHMENT B - REFERENCES

Provide at LEAST 3 references of current or recent past clients, preferably from higher education.

Reference #1	
Agency Name	Fauquier County Public Library
Contact Name	Maria Del Rosso, Director
Email	maria.delrosso@fauquiercounty.gov
Phone #	540-422-8501
# Years w/ Agency	27 years
Services Provided	CATI/ CAWI research

Reference #2	
Agency Name	University of Virginia
Contact Name	Carol P. Keese, Associate Vice President, Marketing
Email	cpl9m@eservices.virginia.edu
Phone #	434-924-3909
# Years w/ Agency	4 years, 5 months
Services Provided	CATI/ CAWI research; depth interviewing and focus group research

Reference #3	
Agency Name	Centre Area Transportation Authority/ CATA
Contact Name	Jacqueline K. Sheader, Public Relations Manager
Email	jsheader@catabus.com
Phone #	(814) 238-CATA (2282) ext. 5141
# Years w/ Agency	17 years, 11 months
Services Provided	CATI Research; On-board transit survey administration

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 through DSBSD online at http://sbsd.virginia.gov.

DEFINITIONS:

"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: Research America, Inc.

Preparer Name: Karin Rosner, Communications Specialist **Date:** 7/30/18

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 Only <u>One</u>: ☐ Small Business ☐ Small and Woman-Owned Business ☐ Small and Minority-Owned Business

DSBSD Certification No.: ______________________ Expiration Date: ______________________

Section B

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

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

Small Business Name, Address & DSBSD Cert No.	Indicate if also: Women (W) or Minority (M) Certified	Contact Person, Telephone & Email	Type of Goods and/or Services	Planned Involvement During Initial Period of the Contract (%)	Planned Contract Dollars During Initial Period of the Contract ($)
Research America does not anticipate the need to seek subcontractors for this contract. If the need to subcontract any portion of the work arises, RAI will advise the client of the change in the scope of work, and seek out a suitable SWaM/ DSBSD contractor to fill the order. Possible needs would include: mailing, printing, temporary staffing services, focus group facility rental in Virginia and other marketing research activity support services.					
				Total Planned Subcontracting Spend ($)	$0.00

UNIVERSITY OF MARY WASHINGTON | Procurement Services

SEALED REQUEST FOR PROPOSAL (RFP)

ISSUE DATE:	Monday July 9, 2018
RFP NUMBER & TITLE:	RFP 19-861 Annual Fall Virginia Statewide Survey Services
PROPOSAL DUE DATE & TIME:	Wednesday, August 1, 2018 @ 2:00PM EST NOTE: Proposals received after the due date and time cannot be accepted.
PROPOSAL DELIVERY ADDRESS:	University of Mary Washington Procurement Services /Reference RFP 19-861 Eagle Village Executive Offices, Suite 480 1125 Jefferson Davis Hwy., Fredericksburg, VA 22401
WORK LOCATION:	☒ All Campuses ☐ Fredericksburg ☐ Stafford ☐ Dahlgren
COMMODITY CODE(S):	91812, 96160
PRE-PROPOSAL CONFERENCE:	☐ Optional ☐ Mandatory ☒ N/A **DATE & TIME:**
CONTRACT OFFICER:	Michelle Pickham **EMAIL:** Mmiller8@umw.edu
PERIOD OF CONTRACT:	July 1, 2019 - June 30, 2020, with five (5) one-year renewal options

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

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

THIS FORM MUST BE COMPLETED AND RETURNED WITH PROPOSAL

Name of Offering Firm: ______________________________

Address of Offering Firm: ______________________________

DSBSD Certification No.: ____________________ Expiration Date: ____________

eVA ID: ______________________________ Tax ID: ____________

Email: ______________________________ Telephone: ____________

Website: ______________________________ Fax: ____________

Submitted By (Print Name & Title): ______________________________

Signature (In Ink): ______________________________ Date: ____________

1301 College Avenue
Fredericksburg, VA 22401-5300
adminfinance.umw.edu/procurement
Tel: (540) 654-1127
Fax: (540) 654-1168
procure@umw.edu

SEALED REQUEST FOR PROPOSALS (RFP)

I. **QUESTIONS/INQUIRIES:** All inquiries for information should be directed via email to the contract officer listed above, referencing the RFP by title and number. No questions will be accepted after **5:00PM EST on Monday July 23, 2018.**

II. **PROPOSAL RECEIPT REQUIREMENTS:** Sealed Proposals for furnishing the goods/services described herein must reach the Proposal Delivery Address Shown on Page 1 and be appropriately date/time stamped by the Procurement Services Official Time Clock prior to the proposal due date/time in order to be considered. **It is the responsibility of the offeror to ensure that the proposal is received on time.**

   A. Proposals must be submitted in a sealed envelope or container that clearly identifies the contents as a response to this RFP.
   B. UMW Procurement Services Office is located in the Eagle Village Executive Offices, Suite 480, and can only be accessed by a single elevator which accommodates the entire building. There is no stair access without a keycard. It is imperative that you allow adequate time to make a delivery.
   C. UMW requires the inclusion of a clearly marked redacted proposal 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: http://www.eva.virginia.gov. It is the sole responsibility of the Offeror to check for all changes to the RFP prior to submission.

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

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

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

I. PURPOSE:

The intent and purpose of this Request for Proposal (RFP) is to solicit proposals from qualified sources to establish a contract through competitive negotiations with one or more qualified contractors to provide political surveying and data collection services as outlined herein to the University of Mary Washington ('UMW' or 'the University'), an agency of the Commonwealth of Virginia. It is intended for the resulting contract to include cooperative language for the benefit of all public bodies and other entities referenced herein.

II. ORGANIZATION OVERVIEW:

Founded in 1908, the University of Mary Washington, is a premier, selective, coeducational, public liberal arts institution that offers rigorous academics in small classroom settings, innovative master teachers, a supportive campus community that values honor and integrity, and a civically, socially, and intellectually engaged community. Located within the Commonwealth of Virginia in Fredericksburg, UMW resides within an hour's drive of both the nation's Capital of Washington, D.C. and the State Capital of Richmond, offering students unique opportunities for internships, research excursions, and recreation. The University currently consists of three colleges for Arts and Sciences, Business, and Education, and two additional campuses: one in Stafford, VA and the other in Dahlgren, VA. For more information about the University of Mary Washington: http://www.umw.edu/about/.

III. BACKGROUND:

Since at least 2013, the University has conducted an annual Virginia Fall survey, spearheaded by the University's Center for Leadership and Media Studies, to gauge likely voter turn-out during elections and perform other voter and election-related research. Previously this annual survey was conducted by Princeton Data Source, who is no longer in business. Thus, the University is seeking to a new multi-year contract with a vendor to provide these services as the data reported from these surveys are important to the University and surrounding communities. The spend for this survey service has historically been approximately $50,000 annually. The University will not guarantee any particular usage amount during any period of the resulting contract, nor will it be held responsible in any way if contract usage exceeds or does not meet this estimate.

IV. CONTRACT PARTICIPATION – COOPERATIVE PURCHASING/USE OF AGREEMENT BY THIRD PARTIES: (This clause shall be incorporated into the final Contract.)

A. Under the authority of §6 of the Rules Governing Procurement of Goods, Services, Insurance and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia (copy available at https://vascupp.org/rules.pdf), 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 businesses, and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities.

VI. PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:

A. GENERAL PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:

1. <u>Proposal Requirements</u> - 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. <u>Protection of Trade Secrets/Proprietary Information:</u> 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, **<u>in writing,</u>** stating the reasons why protection is necessary, and
   - submit, at the same time as the original proposal submission, a separate redacted version of the proposal which contains identical content, but blacks out any protected information not appropriate for public release. ***If a redacted proposal is not received at the same time as the original proposal, no part of the document may later be protected by the Offeror and restricted from public review.***

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

3. <u>Oral Presentations:</u> Offerors who submit a proposal in response to this RFP <u>may</u> be required to give an oral presentation of their proposal to the University. This will provide an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. *Oral presentations are an option of the university and may not be conducted. Therefore,*

proposals submitted in response to this RFP should not be submitted with the presumption that there will be opportunities to revise that proposal after submission.

4. Number of Proposals Required: One (1) printed original and one (1) electronic media version (DVD, CD, Flash Drive) of each proposal is required. Please make sure the electronic version is not password protected without submitting the password or corrupted prior to submitting. One (1) separate printed original and one (1) separate electronic media version (DVD, CD, Flash Drive) clearly marked redacted copy must be submitted if required by the vendor.

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

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

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

1. Complete and return SIGNED RFP cover page. Proposals shall be signed by an authorized representative of the Offeror.
2. Submit a complete response to the RFP, in detail, to include the following:
   a. Detailed responses to §VII.A Statement of Needs outlining the firm's ability to meet those requirements
   b. Detailed responses to all questions/requests for information outlined in §VII.B-D
3. Complete and return Attachment A: Pricing Sheet.
4. Complete and return Attachment B: References.
5. Complete and return Attachment C: Small Business Subcontracting Plan.
6. Submit any exceptions the Offering firm takes to the Terms and Conditions as stated in this RFP.
7. 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 Offeror shall provide the following surveying and data collection services for the Annual Fall Statewide Virginia Survey:

A. General Survey Specifications:

1. Conduct a probability-based sample of adults, age 18+, who are Virginia State residents, regarding the subject of voting/elections.
   a. Representative sample categories can include but are not limited to characteristics such as region, race/ethnicity, gender, and age.
2. Data collection to run approximately in September each year

3. Sample Survey Design - below is a sample of a survey design commonly used for the annual Virginia survey (Please note - actual survey design may vary from year to year):
    a. Sample size n=1000 Virginia residents
    b. 35% of the interviews shall be completed via landline
    c. 65% of the interviews shall be completed via cellular
    d. Data collection shall be conducted in English
    e. The survey shall use a questionnaire provided by the University at least 7 business days prior to the commencement of the data collection.
4. Weighting and Reporting:
    a. Offeror shall weight the data, adjusting for the fact that not all survey respondents are selected with the same probability, and to account for gaps in coverage in the survey frames.
    b. The data should be put through a post-stratification sample balancing ("raking") procedure utilizing state estimates for Virginia adults, balancing the sample to parameters such as gender, age, race/ethnicity, household telephone usage, and educational attainment.
    c. Offeror shall provide the following report data within 3 business days after completion of the interviews:
        i. A clean, labeled SPSS dataset weighted to population parameters
        ii. American Association for Public Opinion Research (AAPOR) compliant methodological report
        iii. Annotated questionnaire with topline results
        iv. Likely voter index

B. Company History & Experience:

1. Describe briefly the history of the firm to include the scope and nature of the company, years of operation, and experience providing similar social-science survey services to similar agencies (preferably within higher education).
2. Provide evidence of having performed other political-based surveys within the past 3 years.
3. Describe a case study where the firm has performed a similar survey to the one in this RFP including sample size, how interviews were conducted, data collection methods, data analysis and weighting process, and reporting methods.
4. Please provide at least 3 references (Reference sheet attachment B) of recent past or current clients, preferably within higher education, for whom similar research/survey services have been or are being performed.
5. Describe any regional or national professional organizations in which your company or key company personnel currently maintain membership (e.g. AAPOR, CASRO, etc.)

C. Methodologies and Reporting:

1. Describe the Offering firm's methodology to complete the survey based on the sample survey design parameters in § VII.A.3.
2. Describe any and all, including new or innovative, technologies available from the Offering firm to complete the survey (e.g. RDD, CATI, etc.).
3. Describe the firm's reporting capabilities and include sample reports with the proposal submission. Include all reporting formats available.

D. Other:

1. Describe in detail any other research services that your company can perform/provide.
2. Describe all languages your firm is able to conduct surveys in, to include any hearing-impairment technologies.

VIII. CONTRACT ADMINISTRATION:

A. Professor of Political Science and International Affairs, Stephen Farnsworth, 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
Capability: Experience and qualifications of Offeror to provide solution	40
Plan & Methodology: Specific plan to implement the required services	30
Pricing: The total cost of the system	20
Small Business Subcontracting Plan	10
Total	100

X. GENERAL TERMS AND CONDITIONS:

Please refer to the link to follow regarding Required General Terms and Conditions of this Solicitation which are a mandatory part of the resulting contract: http://adminfinance.umw.edu/procurement/umw-policies-and-procedures-2/

XI. SPECIAL TERMS AND CONDITIONS:

A. **SOLICITATION:**

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

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. CONTROLLING VERSION OF SOLICITATION: 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.

4. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed bid/proposal must be submitted in a separate sealed envelope or package. The envelope or package should be addressed as directed on Page 1 of the solicitation. If not hand-delivered, the bidder/offeror takes the risk that the envelope, even if marked as described below, may be inadvertently opened and the information compromised which may cause the bid/proposal to be disqualified. Bids/Proposals may be hand-delivered to the address listed on Page 1 of the solicitation. No other correspondence or bids/proposals should be placed in the envelope.

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

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

6. OFFEROR'S ACKNOWLEDGEMENT OF UNDERSTANDING: Offerors, by submission of a proposal, represent that they have read and understand the solicitation documents and specifications and have familiarized themselves with all federal, state and local laws, ordinances, rules and regulations that may affect the cost, progress or performance of the work. The 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 Offeror from any obligations with respect to its proposal or to the contract.

7. PRECEDENCE OF TERMS: The General Terms and Conditions of this solicitation, the Commonwealth of Virginia Procurement Manual for Institutions of Higher Education and their Vendors, Applicable Laws and Courts, Anti-Discrimination, Ethics in Public Contracting, Immigration Reform and Control Act of 1986, Debarment Status, Antitrust, Mandatory use of State Form and Terms and Conditions, Clarification of Terms, Payment 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.

8. 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 contemplated herein.

9. 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.

10. UNDERSTANDING OF REQUIREMENTS: 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. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible Contract Officer in the Procurement Services Office. 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. Your signature on your proposal certifies that you fully understand the requirements of this solicitation.

B. **CONTRACT:**

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

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

3. 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.

4. 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.

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

6. 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.

7. OWNERSHIP OF MATERIALS: Any furnished materials, including but not limited to reports, analyses, data, etc., shall remain the property of the University. All such items and materials shall be delivered to UMW in usable condition after completion of the work, and prior to submission of the final invoice for payment.

8. PRICE ESCALATION/DE-ESCALATION: Price adjustments may be permitted for changes in the contractor's cost of materials or services. No price increases will be authorized for 365 calendar days after the effective date of the contract. Price escalation may be permitted only at the end of this period and prior to each renewal period thereafter and only where verified to the satisfaction of the purchasing office. However, "across the board" price decreases are subject to implementation at any time and shall be immediately conveyed to the University. Contractor shall give not less than 30 days advance notice of any price increase to the purchasing office. Any approved price changes will be effective only at the beginning of the calendar month following the end of the full 30 day notification period. The contractor shall document the amount and proposed effective date of any general change in the price of materials. Documentation shall be supplied with the contractor's request for increase which will: (1) verify that the requested price increase is general in scope and not applicable just to the University; and (2) verify the amount or percentage of increase which is being passed on to the contractor by the contractor's suppliers. The purchasing office will notify the using agencies and contractor in writing of the effective date of any increase which it approves. However, the contractor shall fill all purchase orders received prior to the effective date of the price adjustment at the old contract prices. The contractor is further advised that decreases which affect the cost of materials are required to be communicated immediately to the purchasing office.

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

10. RENEWAL OF CONTRACT: This contract may be renewed by the University upon written agreement of both parties for five (5) successive one year periods, 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.

11. 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.

12. 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 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 the Department of Minority Business Enterprise (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 purchasing 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 contracting agency or institution 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 purchasing 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 agency or institution. The agency or institution 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 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 purchasing office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted, and type of product or service provided.

13. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing 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.

XII. METHOD OF PAYMENT:

The contractor shall be paid using one of the following three (3) methods for all University initiated procurements:

A. Small Purchase Charge Card (SPCC): At the time of verified receipt of goods or services, if the Contractor accepts credit cards in payment, the University will authorize payment by SPCC, currently Bank of America Visa. Any "Check-out fees" imposed by the contractor must be disclosed prior to the purchase and shall be detailed in a separate line item on the receipt at point of sale. No check-out fee or surcharge may be greater than 4% of the total sale. *If the contractor's eVA profile indicates acceptance of a credit card in payment, the Commonwealth will pay via charge card for invoices $50,000.00 or less.*

B. ePayables through Bank of America: All payments under ePayables will have a net 16 payment term. For more information about this payment option, contact UMW's Accounts Payables department at payables@umw.edu or view http://www.bankofamerica.com/epayablesvendors.

C. 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 invoices must be received at the following address should reference the eVA purchase order and UMW contract numbers**:

University of Mary Washington
Attention: Accounts Payable
1301 College Avenue
Fredericksburg, VA 22401

ATTACHMENT A - PRICING SHEET

Please provide pricing per the survey specifications listed in the RFP for the following ranges of possible survey lengths and any other additional costs.

Description	Administrative Costs	Any Additional Costs (please describe)	Total Survey Cost
Survey Length 15-17 minutes			
Survey Length 17-19 minutes			
Survey Length 19-21 minutes			
Survey Length 21-23 minutes			
Survey Length 23-25 minutes			

Evaluation of price will be the "Total Annual Survey Cost" based on the following scenario:

- Sample size n=1000 Virginia residents
- 35% of interviews shall be completed via landline
- 65% of interviews shall be completed via cellular
- Survey length of 15 minutes

If the vendor's standard pricing is based on a different pricing structure than above, please submit the alternate pricing structure based on the scenario above.

ATTACHMENT B - REFERENCES

Provide at LEAST 3 references of current or recent past clients, preferably from higher education.

Reference #1	
Agency Name	
Contact Name	
Email	
Phone #	
# Years w/ Agency	
Services Provided	

Reference #2	
Agency Name	
Contact Name	
Email	
Phone #	
# Years w/ Agency	
Services Provided	

Reference #3	
Agency Name	
Contact Name	
Email	
Phone #	
# Years w/ Agency	
Services Provided	

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 through DSBSD online at http://sbsd.virginia.gov.

DEFINITIONS:

"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 Only <u>One</u>: ☐ Small Business ☐ Small and Woman-Owned Business ☐ Small and Minority-Owned Business

DSBSD Certification No.: ______________________ Expiration Date: ______________________

Section B

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

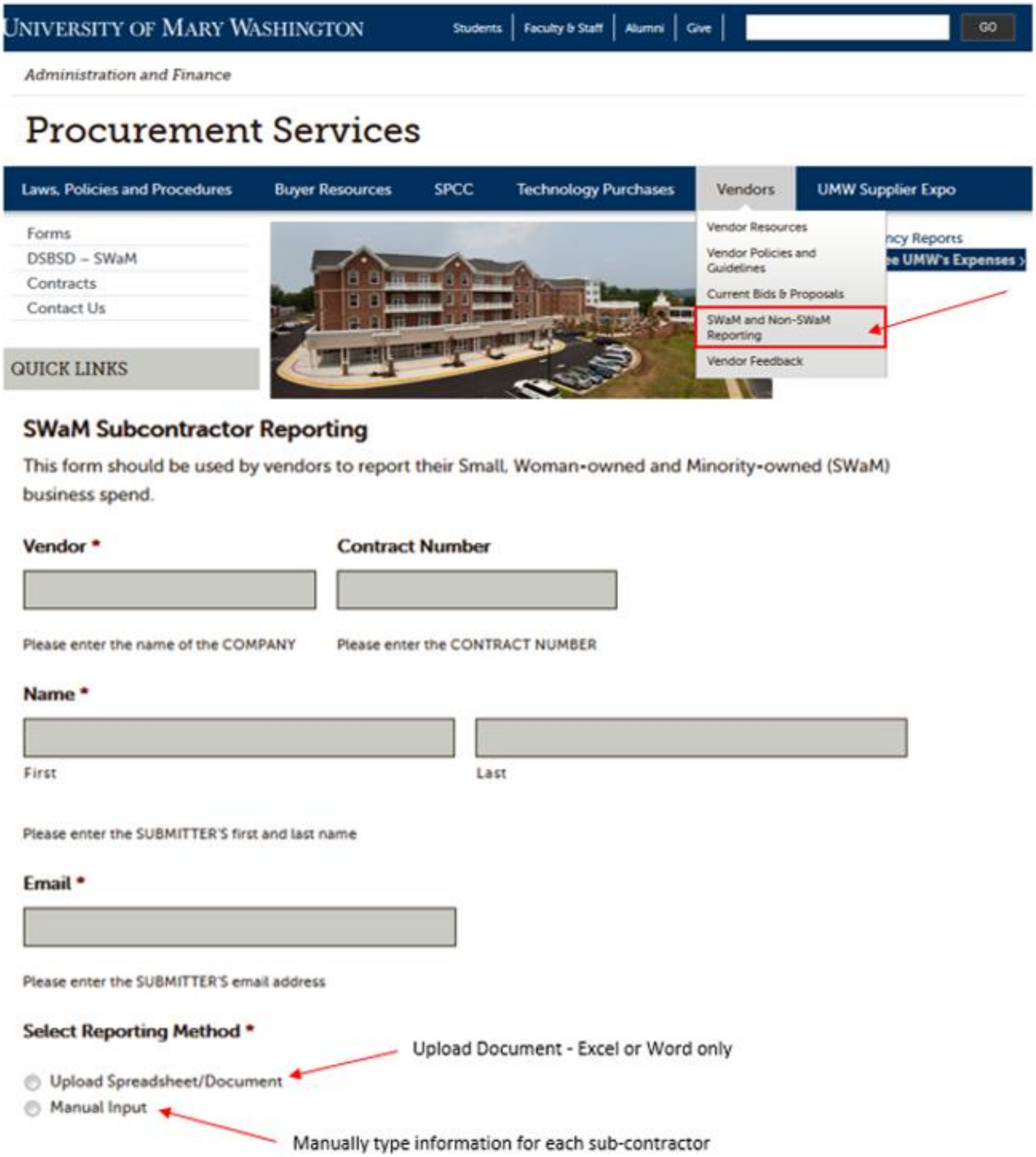
Plans for Utilization of DSBSD-Certified Small Businesses for this Procurement

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

ATTACHMENT D - SWAM SUBCONTRACTING SPEND REPORTING

FORM LOCATED ON PROCUREMENT SERVICES WEBSITE

http://adminfinance.umw.edu/procurement/vendors-2/swam-reporting/



ATTACHMENT E - SWAM INITIATIVE LETTER

UNIVERSITY OF MARY WASHINGTON | Procurement Services

TO: **University of Mary Washington Supplier Community**

FROM: **Lynne Richardson** 12/12/17
Interim Vice President for Administration and Finance

RE: **University Supplier Diversity Initiative**

Greetings, University Supplier Community:

In order to achieve the University's mission of "providing a superior education that inspires and enables our students to make positive changes in the world," UMW relies on the support of its supplier community to provide necessary goods and services through its procurement processes.

A vital part of University procurement is its commitment to doing business with Virginia-certified small, women-owned, and minority-owned businesses and developing long-term partnerships in order to support both the mission of the University and the economic growth of the businesses in a fiscally responsible manner.

The University asks its suppliers to certify with the Department of Small Business and Supplier Diversity if qualified, or to show support for these certified businesses by establishing subcontracting alliances with these businesses. If vendors require assistance with small business certification, please contact the University's Small Business Development Center (SBDC) or the University's Procurement Services office.

Large businesses also play an important role in supporting the University's initiative by subcontracting work to Virginia-certified small businesses. If large businesses need assistance in locating small businesses for subcontracting, please visit the DSBSD website, or contact the University's Procurement Services office. Reporting small business subcontracting spend on a monthly or quarterly basis to the University's Procurement Services office is easy; a reporting template is located on Procurement's webpage: http://adminfinance.umw.edu/procurement/swam-2/swam-reporting/

As an agency of the Commonwealth of Virginia and as a community of globally minded citizens, this initiative is important to the University.

Again, the University thanks you for your continued support and partnership.

November 15, 2017

ATTACHMENT F - RFP 19-861 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

- No Questions Accepted after **July 23, 2018 @ 5:00PM EST.** All Questions must be directed toward the Procurement Officer for this solicitation: Michelle Pickham, mmiller8@umw.edu, and 540-654-2260.
- Proposal Due Date: **August 1, 2018 @ 2:00PM EST** - Proposals submitted after 2PM as indicated by the official Procurement clock will NOT be accepted.
- All proposals must be submitted in a SEALED envelope identifying the firm's name and the solicitation number at a minimum. If sending the proposal by mail, the address to send the proposal to is located on the RFP Cover Page.
- **Read the ENTIRE RFP including terms and conditions and attachments carefully before submitting a proposal.**

REQUIRED DOCUMENT SUBMISSION

Acknowledgement:

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

Documents to Submit:

☐ Completed and signed RFP cover page.
☐ Any/All signed addenda.
☐ 1 Physical/Hard Copy of Proposal (Original and Redacted)
☐ 1 Electronic Copy of Proposal (Original and Redacted)
☐ Detailed responses to §VII Statement of Needs.
☐ Completed Attachment A, Pricing Sheet.
☐ Completed Attachment B, References.
☐ Completed Attachment C, Small Business Subcontracting Plan.
☐ Any exceptions taken to University's Terms and Conditions.