

STANDARD CONTRACT
UCPUMW 18-788
Call Center/Tele-Recruiting Services

This contract entered into this 27th day of April, 2018 by Telerecruiting Corp., hereinafter called the "Contractor" and the Commonwealth of Virginia, 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: April 27, 2018 - April 26, 2021, with three (3) one-year renewal options

CONTRACT DOCUMENTS: The contract documents shall consist of:

1. This signed Contract;
2. The Contractor's proposal dated March 7, 2018 including all attachments;
3. RFP 18-788 Addendum 1, dated February 27, 2018; and
4. The original solicitation, RFP 18-788, dated February 12, 2018.

The above documents are listed in order of precedence. 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 Call Center/Tele-Recruiting services described herein:

A. General Requirements - the Contractor shall:

1. Provide personalized tele-search activity with execution of phone calls in the evenings Sunday through Friday from 5:00pm-8:30pm and Saturdays from 1:00pm-5:00pm. All call times are in the time zone of the student being called.
2. Provide a highly skilled team of communication professionals with knowledge of admissions requirements and processes.
3. Provide an experienced Project Manager to work closely with UMW staff members in the Office of Enrollment Management.
 - a. Use a customized call-script designed to address the University's specific objectives.
 - b. Provide a detailed reporting following each call campaign to include both quantitative and qualitative data (examples of report data can include: students admitted who didn't enroll, ages 18yr-45yr, male and female students, etc.)

B. The Contractor shall strive to meet the following goals:

1. Initiate calls to students and/or parents with a minimum of 80% of the names provided by the University. Initiated calls are calls that may not be successful in reaching a student/parent.
2. Complete calls to students and/or parents with a minimum of 45% of the names provided by the University. Completed calls are calls that are initiated and reach a student/parent, resulting in a conversation.
3. Leave voicemail messages for a minimum of 35% of the names provided by the University.

C. The University will:

1. Provide a list of names and numbers of students who have expressed interest in the University of Mary Washington.

2. Assist in selecting the team of communication professionals for the tele-search tasks based on their individual qualifications, experience, and demonstrated skills.

PRICING: Calling Campaign Pricing for the Initial Term (2018-2021)

| Description | Total Cost |
|---|-------------|
| 5,000 names (estimated) with telephone numbers @ \$2.00 per name received | \$10,000.00 |
| 2,250 completed calls (est. 45%) @ \$3.50 per call | \$7,875.00 |
| 1,750 personalized VM messages @ \$1.00 per message (est. 35%) | \$1,750.00 |
| Set-up fee/final report/caller ID fee for two to four campaigns | \$1,250.00 |
| Total Estimated Cost per Campaign | \$20,875.00 |

CONTRACT ADMINISTRATION: The Director of Undergraduate Admissions or designee, shall be identified by the University as the Contract Administrator and shall use all powers under the contract to enforce its faithfulness and performance in conjunction with the University’s Procurement Services department.

GENERAL TERMS AND CONDITIONS: Please refer to the link to follow regarding Required General Terms and Conditions of this 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 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. **ADVERTISING TO THE GENERAL PUBLIC:** In the event a contract is awarded for services resulting from this solicitation, no indication of such services to the University of Mary Washington will be used in product literature or advertising. The contractor shall not state in any of its advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
3. **APPLICABLE LAWS AND COURTS:** This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The agency and the contractor are encouraged to resolve any issues in controversy arising from the award of the contract or any contractual dispute using Alternative Dispute Resolution (ADR) procedures (Code of Virginia, § 2.2-4366). ADR procedures are described in Chapter 9 of the Vendors Manual. The contractor shall comply with all applicable federal, state and local laws, rules and regulations.
4. **AUDIT:** The Contractor hereby agrees to 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 Agency, its authorized agents, and/or State auditors shall have full access to, and the right to examine any of said materials during said period.

5. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
6. 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.
7. 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.
8. CONTINUITY OF SERVICES: The Contractor recognizes that the services under this contract are vital to the Agency and must be continued without interruption and that, upon contract expiration, a successor, either the Agency or another contractor, may continue them.
- a. The Contractor agrees:
 - i. To exercise its best efforts and cooperation to effect an orderly and efficient transition to a successor;
 - ii. To make all Agency owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the contract to facilitate transition to successor; and
 - iii. That the Agency Contracting Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.
 - b. The Contractor shall, upon written notice from the Contract Officer, furnish phase-in/phase-out services for up to ninety (90) days after this contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Contract Officer's approval.
 - c. The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations) and a fee (profit) not to exceed a pro rata portion of the fee (profit) under this contract. All phase-in/phase-out work fees must be approved by the Contract Officer in writing prior to commencement of said work.
9. CONTRACT PARTICIPATION – COOPERATIVE PURCHASING/USE OF AGREEMENT BY THIRD PARTIES (RESTRICTED USE FOR INITIAL TERM - See 9b):
- 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. No Virginia Public Higher Education Institutions shall be allowed by the Contractor to participate in this cooperative contract during the initial three-year term of this contract. This restriction does not apply to other Virginia agencies outside of Public Higher Education Institutions. Voluntary participation by other Virginia Public Higher Education Institutions shall be allowed following the initial three-year term, if the contract is renewed for the potential renewal option periods.
 - c. 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.
 - d. The Contractor shall notify UMW in writing of any such entities accessing the contract. The Contractor shall provide semi-annual usage reports for all entities accessing the contract. 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.
10. **E-VERIFY PROGRAM: EFFECTIVE 12/1/13:** Pursuant to 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.
11. **EXTRA CHARGES PROHIBITED:** The bid or proposal price shall be complete; and shall include all applicable license fees and any other charges; extra charges invoked by the contractor shall not be honored or paid unless agreed upon in writing. 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

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procure@umw.edu

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.

12. 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.

13. NOTICES: Any notice, demand, request, consent, approval or communication required by this Agreement to be given in writing shall be sent by certified mail, return receipt requested, and shall be deemed to be given received within five (5) days after delivery to the U.S. Postal Service (stamped evidence of delivery) when received and shall be addressed to the University or Merchant at their respective addresses. Official written notices shall be directed to UMW at the following address:
Attn: Procurement Services
University of Mary Washington
1301 College Avenue
Fredericksburg, VA 22401

14. OFFEROR'S REPRESENTATION: 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.

15. ORDER OF PRECEDENCE: Any relationship as a result of this RFP will be governed by a Contract that the Offeror must execute with the University. If it is determined by the University that any part of this RFP is in conflict between the terms and conditions of the Contract, the terms of the Contract shall prevail. Offerors should review the Contract (which will include General and Special terms and conditions detailed in this document) and if there are any proposed changes, submit a Word format redline markup as part of the RFP response.

16. 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.

17. RENEWAL OF CONTRACT: This contract may be renewed by the University upon written agreement of both parties for three (3) 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.

18. 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.

19. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:

- a. It is the goal of the Commonwealth that 42% of its purchases be made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the 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 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 Small Business and Supplier Diversity (DSBSD) by the due date for receipt of bids or proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the Procurement office at a minimum the following information: name of small business with the DSBSD certification number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of 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 monthly basis, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the Procurement office at a minimum the following information:
 1. Name of firm with the DSBSD certification number
 2. Phone number
 3. Total dollar amount subcontracted
 4. Category type (small, women-owned, or minority-owned)
 5. Type of product or service providedPayment(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 monthly basis, information on use of subcontractors that are not DSBSD-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the Procurement office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted, and type of product or service provided.

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

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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:

1. 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.*
2. 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>.
3. Check or ACH: Payment will be made 30 days after satisfactory performance of the contract in all provisions thereof and upon receipt of a properly completed invoice, whichever is later; in accordance with the Virginia Prompt Payment Act. Ref.: Code of Virginia, Sections 11-62.1 through 11-62.9; "Prompt Payment Act" memorandum issued by the Office of the Comptroller, June 27, 1984.

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 an 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: <u><i>Gina Campbell</i></u> | | Signature: <u><i>Melva A. H. Kishpaugh</i></u> | |
| Printed Name: <u>Gina Campbell</u> | | Printed Name: <u>Melva A. H. Kishpaugh</u> | |
| Title: <u>President</u> | | Title: <u>Director, Procurement Services</u> | |
| Date: <u>4/25/2018</u> | | Date: <u>April 26, 2018</u> | |
| FEI/FIN#: <u>46-5195022</u> | | | |
| Phone: <u>914-245-5953</u> | | | |
| Email: <u>gina@telerecruiting</u> | | | |



SEALED REQUEST FOR PROPOSAL (RFP)

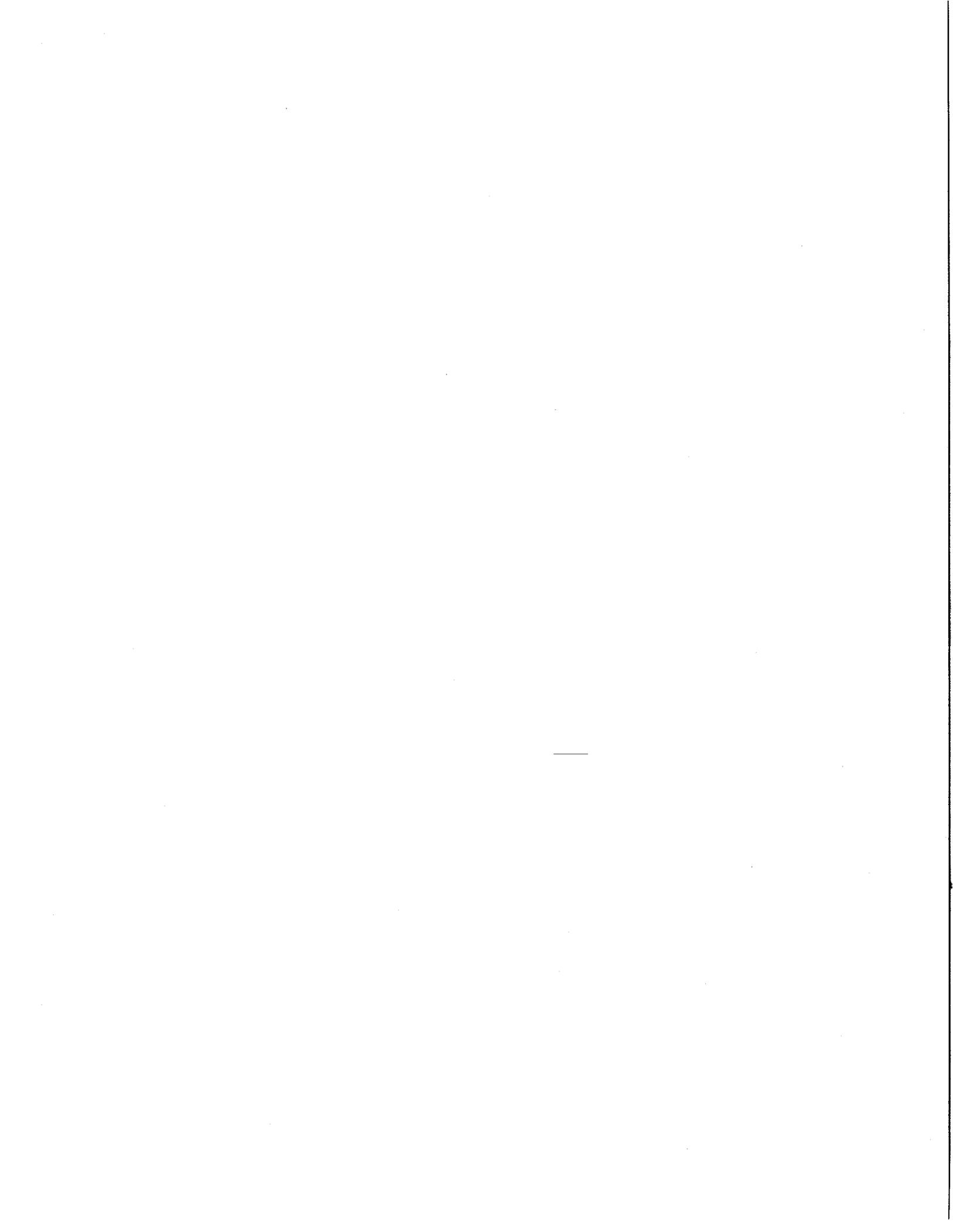
ISSUE DATE: February 12, 2018
RFP NUMBER & TITLE: RFP 18-788 Call Center/Tele-Recruiting Services
PROPOSAL DUE DATE & TIME: March 9, 2018 @ 2PM EST
PROPOSAL DELIVERY ADDRESS: University of Mary Washington
WORK LOCATION: Fredericksburg, VA
COMMODITY CODE(S): 91520
PRE-PROPOSAL CONFERENCE: [] Optional [] Mandatory [X] N/A
CONTRACT OFFICER: Michelle Pickham EMAIL: mmiller8@umw.edu
PERIOD OF CONTRACT: Date of Award through 3 years, with 3 one-year renewals or as negotiated.

In compliance with this Sealed Request for Proposal (RFP) and to all the conditions imposed therein, the undersigned offers and agrees to furnish the goods/services described at the prices indicated in their proposal or as mutually agreed upon by subsequent negotiation.

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.

THIS FORM MUST BE COMPLETED AND RETURNED WITH PROPOSAL

Name of Offering Firm: Telerecruiting Corp.
Address of Offering Firm: 3174 Arbour Ln., Yorktown Heights, NY 10598
DSBSD Certification No.: Expiration Date:
eVA ID: VS0000211302 Tax ID: 46-5195022
Email: gina@telerecruiting.com Telephone: 914-245-5955
Website: www.telerecruiting.com Fax:
Submitted By (Print Name & Title): Gina R. Campbell, President
Signature (In Ink): [Handwritten Signature] Date: 3/7/18





3174 Arbour Lane
Yorktown Heights, NY 10598
Phone: 914-245-5955
Fax: 815-550-8687
gina@telerecruiting.com
www.telerecruiting.com

RFP 18-788 Call Center/Tele-Recruiting Services

March 8, 2018

University of Mary Washington
Procurement Services / Reference 18-788
Eagle Village Executive Offices, Suite 480
1125 Jefferson Davis Highway
Fredericksburg, VA 22401

This document serves as a formal proposal for Telerecruiting Corp. to provide telerecruiting services for UMW.

History and Background

Telerecruiting Corp. was founded in 2014 by Gina R. Campbell. The firm conducts calling campaigns throughout the year to prospective students on behalf of colleges and universities located throughout the U.S. Prior to founding Telerecruiting Corp., Gina served as the Managing Director of the Telerecruiting Division of GDAIS (George Dehne Associate Integrated Services) for 20 years. As the Managing Director of the Telerecruiting Division of GDAIS, Gina was responsible for the implementation and management of over 1,300 calling campaigns directed to prospective college students. When the President and founder of GDAIS retired in 2014, Gina incorporated to ensure a seamless transition for the colleges and universities that relied upon the services provided by Telerecruiting.

Points of Distinction

Telerecruiting Corp. is the only telemarketing firm in the country dedicated solely to admissions recruitment and retention. Our goal is to provide Admissions Offices with the highest quality calling service available. We serve a wide range of colleges and universities, both public and private. A point of pride is the high percentage of our clients who are repeat clients – colleges and universities who have used our services for many years and who use our services throughout the recruiting cycle. Our clients think of us as an extension of their admissions operations. As a small firm, we can react quickly to the changing needs of our clients. Half-way through a recruiting cycle, a client might realize they are down in applications or visits, or a client may be up in applicants but the percentage of applicants who have visited is lower than in previous years. In all of these cases, Telerecruiting Corp. can implement a calling campaign within a matter of days in order to address whatever concerns an Admissions Office may be encountering.

All Telerecruiters who make calls for Telerecruiting are former admissions professionals. The professional backgrounds of our callers are rich and varied. All our callers possess a bachelor's degree and many of them possess advanced degrees. Most importantly, all them have worked professionally in college admissions. Positions held by our callers include Director of Admissions, Associate Director of Admissions, Assistant Director Admission and Admission Counselor. In addition to their professional experience in college admissions, many of our callers have also worked as high school guidance counselors as well as in other professional positions in higher education such as financial aid, residence life, and career planning and placement.

Telerecruiting understands the college admissions and financial aid process.

Simply put, admissions recruitment is all we do. Telerecruiting specializes in admissions recruiting, both at the undergraduate and graduate/professional levels. Our callers can professionally advise first-time freshman, prospective transfer students, and their parents. Our callers are also completely familiar with the "lingo" used by prospective students (EA, ED, SAT II, AP scores, Test Optional, FAFSA, ZeeMee profile, etc.). Callers can also advise families about the financial aid process and encourage parents to reach out to an institution's Financial Aid Office for assistance.

Our Telerecruiters will engage prospective students in a conversation.

Our Telerecruiters will convey and capture all the information that you request. In addition, they will be well-versed enough about UMW that our call does not sound scripted. Our callers are trained to address students' concerns as they come up in the conversation. Our goal is to engage the student in a meaningful conversation. We try not to "talk at" the student, but rather to talk *with* the student about the subjects that seem of interest to him or her. As parents are generally the ones in a household most likely to pick up the home phone, our callers are also prepared to engage parents in a conversation. This is where it is especially important for the caller to have admissions experience as well as be confident, articulate and empathetic to the needs of parents, particularly parents who are unfamiliar with the college admissions process. Almost all of our callers are parents themselves, so they feel completely conformable speaking with both students and parents. Perhaps most important, our callers are good listeners. They will react appropriately to any information that a prospect or parent shares with him/her.

Telerecruiting does more than simply qualify the student's level of interest.

Most telemarketing firms simply qualify whether a student is still interested in a given school. Telerecruiting will go a step beyond merely qualifying your inquiries by "selling" UMW to prospective students. We create scripts that allow us to highlight your strengths. We begin our conversations by finding out what factors are important to the student. Next, we address how UMW is a match for what the student is seeking and provide the student with compelling reasons why he/she should apply to the UMW such as the personal attention given to all students, UMW's reputation as a Best Value school, and ideal location for internships. This is especially critical as some students may not be fully aware of all that the UMW has to offer. If a student receives a contact from a call center to simply qualify the student's interest, a student who is not fully informed about UMW may indicate they are not sure or not that interested. This is truly a missed opportunity. Furthermore, once a connection has been made with a student, it is essential to maintain the lines of communication by offering the student the opportunity to receive a contact from a current student, the student's Admissions Counselor, etc.

Project Objectives

Telerecruiting will work closely with your Director of Admissions to identify specific project objectives for each calling project, based on who we are calling, the time of year we are calling, and specific events on your calendar (upcoming visit opportunities, etc.).

For calls to inquiries, project objectives would most likely include the following:

1. Invite students to apply by February 1, and if applicable, share an application fee waiver code with the student. Inform students that they can apply using either the Common App or the Coalition App.
2. Encourage students to visit and provide students with details regarding all upcoming visit opportunities. Encourage students to interview by March 1 in order to be considered for institutional scholarships.
3. Confirm student's intended major.
4. Determine student's extra-curricular interests (athletics, community service, clubs, etc.).
5. Qualify the interest of every student.
6. Determine if the student needs any sort of follow-up from his/her Admissions Counselor or a current student.
7. Remind students to file a FAFSA as soon after October 1 as possible and to include the UMW's FAFSA code (003746) on their FAFSA.

For calls to incomplete applicants, project objectives would most likely include:

1. Inform students which credentials are still needed to complete their application file.
2. Confirm student's intention to complete his/her application.
3. Invite student to visit.
4. Assess which factors will be most important to the student in making an enrollment decision whether it be cost, location, size, major, academic reputation, etc.
5. Determine where the UMW ranks among the student's top choices.
6. Determine if the student needs any sort of follow-up from his/her Admissions Counselor or a current student.
7. Encourage students to file the FAFSA if they have not yet done so. If a student does not intend to file the FAFSA, determine why not.

For calls to accepted students, project objectives would most likely include:

1. Congratulating the student on his/her acceptance to the UMW
2. Congratulate student on receiving a scholarship if applicable.
3. Invite students to overnight event for accepted students and encourage accepted students to shadow a current for a day.
4. Determine where the UMW ranks among the student's top choices.
5. Determine if the student needs any sort of follow-up from his/her Admissions Counselor or a current student.
6. Encourage student to deposit and ensure student is aware of all deadlines.

Follow-Up

During all calling campaign, Telerecruiting will email the Director of Admissions a spreadsheet with the calls results from the previous evening as well as a master spreadsheet with all call results to date. In addition, Telerecruiting will separate the call results by counselor and email each Admissions Counselor the call results for his/her own students. The spreadsheet will include fields to track responses to all key questions such as each student's interest level, any requests for follow-up, the student's intention to visit, the student's intended major and extra-curricular interests, and any data changes obtained, etc.). Telerecruiting will accommodate requests to track any information desired by UMW.

The Director of Admissions will have opportunity to review and approve the format for the spreadsheet prior to the start of each calling project.

After the calling project, Telerecruiting will submit a master spreadsheet that accounts for every name received at the start of the calling project. Every record will include one of the following:

- ✓ An interest code if we were able to complete the call with the student or a parent.
- ✓ A left message code if we left a message for with student.
- ✓ A code to note if we were unable to complete a call (no opportunity to leave a voicemail message, wrong/disconnected phone number, non-English-speaking household, etc.)

Note: Telerecruiting Corp. can provide documentation from the caller ID service to verify when the message was left (date and time), the phone number called, and the length of the call.

Final Report

Telerecruiting will also provide a written report that includes the following information:

- A summary of the cumulative results (number and percentage of students reached, number and percentage of students for whom we left a message, number and percentage of students who we did not reach and why we were unable to reach the student such as the phone number was wrong/disconnected, the student never picked up, there was no opportunity to leave a voicemail, the student hung up on caller, etc.)
- A summary of the interest levels for all students with whom we completed a call.
- A summary regarding the amount of follow-up that was requested (contact from current student requested, contact from Admissions Counselor requested, etc.)
- Representative comments regarding the campus visit from students who have already visited campus
- Visit intention codes for students who have not yet visited
- Primary reasons why students were no longer interested
- A listing of the institutions where no longer interested students are planning to apply/enroll.

Training

In addition to their general knowledge about college admissions and the college selection process, our callers will receive extensive training to ensure that they can answer questions that are specific to UMW. Telerecruiting guarantees to educate and inform all callers assigned to your calling campaign about the academic profile, admission practices, scholarship process, etc. of

UMW. Before they make their first call, our telerecruiters will carefully review all information available about UMW so that they are fully prepared to answer most questions they might be asked by a student or parent. If a caller cannot answer a specific question, he/she will ensure the student that the question will be passed on to the appropriate individual at UMW who can answer the question. Our callers will also determine the student's preferred method of contact (email or phone). If the student prefers an email contact, we will confirm the student's email address. If the student prefers a telephone contact, we will determine the best phone to use (cell or home or parent cell). UMW will have the opportunity to review and approve all training materials before they are used.

Training materials would include:

- The UMW website, particularly the pages pertaining to the application process as well as financial aid and scholarship process. In addition to viewing the website online, callers will be given Word documents with key downloads from the UMW website such as the entering class profile, the grid detailing First-Year Scholarships, and an Admissions Checklist.
- Callers will review PDFs of all key admissions publications such as the UMW viewbook, yield brochure, etc.
- Callers will review the online virtual tour to get a better sense of the campus layout and architecture.
- Any internal documents the Admissions Office can provide such as an Admissions Session Power Point used by the Admissions Staff with prospective students and parents.
- Documents prepared by the President of Telerecruiting Corp. such as:
 - ✓ A detailed, customized script (see sample provided)
 - ✓ A fact sheet (see sample provided)
 - ✓ A comprehensive list of the strengths of UMW (see sample provided)
 - ✓ A list of all upcoming visit opportunities (see sample provided).
 - ✓ A document entitled, "Project Highlights" which provides detailed information on the project objectives and items that our callers need to know but that are not available online (see sample provided).
 - ✓ Any additional materials provided by UMW.

Campaign Project Manager

All calling campaigns will be managed directly by Gina Campbell, the President of Telerecruiting Corp. Please see attached resume for Gina's background in college admissions and managing calling campaigns. In addition, Gina will be directly responsible for the development of the script and all training materials used by the callers. UMW retains the right to review and approve the script as well as all training materials.

Logistics

Time Line for Calling Projects

Most calling campaigns run about 14 – 18 days. Telerecruiting can also accommodate ongoing projects. Telerecruiting Corp. will accommodate any requests regarding when UMW would like calls to be made both in terms of dates and times. Calls can be made at any time of year except for national holidays and religious holidays such as Christmas and Easter.

For the majority of calling campaigns, Telerecruiting Corp. recommends attempting students up to three times. If we are unable to complete the call with the student or a parent, but there is an opportunity to leave a voicemail message, our caller will leave a message that has been pre-approved by UMW on the third attempt. The message left will be personalized as much as possible to include the student's name, and if desired, the name and contact information of the student's Admissions Counselor. All voicemail messages will be made using a Caller ID service that will allow the telephone number for the UMW Admissions Office to appear on a family's Caller ID. UMW may also be displayed on a family's Caller ID.

It is important that the Caller ID service we use entails zero lag time between when the student picks up and our caller introducing himself/herself as our caller is already on the line when the phone number is being dialed. Many telemarketing firms use robo-dialing services which means there is lag time between when the student picks up and when the telemarketer speaks. Most people respond poorly to this time lag and often hang up the phone before the telemarketer gets connected to the person they are trying to reach. The percentage of hang-ups that we encounter is typically one percent, which is significantly lower than the percentage encountered by other telemarketing firms.

As noted earlier, Telerecruiting Corp. can provide documentation from the caller ID service to verify when the message was left (date and time), the phone number called, and the length of the call.

Supplies Needed

Telerecruiting will perform the entire contract using our own equipment, supplies, and materials.

Adherence to FTC Telemarketing Rule

It is the policy of Telerecruiting to only call prospects with whom the client has an existing relationship, i.e., students for whom you have a name and address on file. Telerecruiting does not recommend calling search non-respondents.

Insurance

Telerecruiting Corp. maintains general liability insurance and can provide certification of this if needed.

Consumer Information

There are no judgments against, nor have there ever been any judgments against Telerecruiting Corp. for telemarketing violations. There have never been any complaints about Telerecruiting Corp. to the Better Business Bureau or any other consumer protection agency/ organization.

Final notes

Telerecruiting will gladly accommodate specific requests pertaining to the script, calling times, the method for reporting daily follow-up and the contents of our final report.



3174 Arbour Lane
Yorktown Heights, NY 10598
Phone: 914-245-5955
Fax: 815-550-8687
gina@telerecruiting.com
www.telerecruiting.com

Listed below are a few testimonials from satisfied clients regarding how a calling campaign with Telerecruiting Corp. helped them achieve concrete results.

“Last year, we used Telerecruiting for the first time to help increase pharmacy applications and enrollees. We could not have been happier with the result. Not only did we double our applications, we had to institute a waitlist for Fall 2017. Thanks to Telerecruiting’s exceptional callers, we received great feedback from every call. We will definitely use their services again for next academic year!”

James Barrett, Director of Admissions
Northeast Ohio Medical University

“We’ve used Telerecruiting for many years to contact our hottest prospects as well as out admitted students. This past year, we also used Telerecruiting Corp. for a high-volume inquiry campaign. As far as numbers are concerned, I can say our completed apps are up 11% over last year and that is controlling for print materials and email campaign. I attribute a significant part of this increase to making these calls with Telerecruiting Corp.”

Alexa Wood Gaeta , Vice President for Enrollment and Dean of Admission
Agnes Scott College

“Our first calling campaign contributed to a 20% increase in applications and a 50% increase in higher scoring LSAT students. Calling campaigns with Telerecruiting Corp. are now a vital part of our marketing strategy.”

Director of Admissions
Private law school located in the mid-west

“Telerecruiting Corp. has helped us with our outreach efforts for nearly 10 years. It’s not something we think twice about when the time comes to qualify names each fall. Everything is done in a very professional manner, and our experiences have been nothing but positive. Everyone in our Admissions Office appreciates their excellent work. With their help, we are able to achieve our ever-increasing reaching goals.”

Dan Bonte, Coordinator of Undergraduate Admissions
Dakota Wesleyan University



Handwritten text in the top left corner, possibly a name or address.

Main line of handwritten text, possibly a title or header.

Second main line of handwritten text, possibly a paragraph or a list.

Handwritten text in the middle right section, possibly a signature or date.

Third main line of handwritten text, possibly a paragraph or a list.

Handwritten text in the middle right section, possibly a signature or date.

Fourth main line of handwritten text, possibly a paragraph or a list.

Handwritten text in the middle right section, possibly a signature or date.

Fifth main line of handwritten text, possibly a paragraph or a list.

Handwritten text in the bottom right section, possibly a signature or date.

Gina R. Campbell
President, Telerecruiting Corp.
3174 Arbour Lane
Yorktown Heights, NY 10598
Phone: (914) 245-5955
Email: gina@telerecruiting.com

I am passionate, motivated, and extremely driven to provide my clients with the absolute highest quality calling campaign service in the nation. There is nothing that I love more than sharing with my clients the knowledge gleamed from managing thousands of calling campaigns to millions of students and their parents.

PROFESSIONAL EXPERIENCE

- 2014 – present President and Founder, Telerecruiting Corp.
Successfully implement and manage calling campaigns of the highest quality for colleges and university Admissions Offices located throughout the U.S. Work closely with clients to determine project objectives based on who is being called and desired outcomes. Ensure that every calling campaign meets a client's needs.
- 1994 – 2014 GDAIS, Managing Director of Telerecruiting Division
- 1990 – 1994 Director of Admissions, Marymount College Tarrytown, NY
Increased new student enrollment over 25 percent.
- 1989 – 1990 Director of Admissions, The Wooster School, Danbury, CT
- 1988 – 1989 Assoc. Director of Admissions, Carnegie Mellon University, Pittsburgh., PA
- 1987 - 1988 Brand Management, Smith Kline Beecham Corp., Pittsburgh, PA
- 1986 - 1987 Marketing Communications Writer, Westinghouse Corp., Pittsburgh PA
- 1983 – 1985 Assist. Director of Admissions, Carnegie Mellon University, Pittsburgh., PA

EDUCATION

- M.A. Professional Writing, Carnegie Mellon University, 1985
B.A. Professional Writing, Carnegie Mellon University, May 1983

HONORS

- YMCA of Central & Northern Westchester, Volunteerism Award
- Distinguished Service Award for "meritorious leadership and service to Carnegie Mellon University."
- Graduated with Honors from Carnegie Mellon University.



Sample Profiles of Telerecruiting Corp. Caller Team

Please note that while Telerecruiting Corp. cannot guarantee in advance the availability of specific callers for a given calling campaign, every effort will be made to accommodate specific requests. Telerecruiting Corp. can guarantee that every caller has worked professionally in college admissions and that every caller possesses a bachelor's degree. Listed below is a sampling of current callers and their professional backgrounds.

Melissa G

College of St. Mary, Director of Admissions
Also worked in admissions at MacMurray College, Kalamazoo College, and Clarkson College
Director of Admissions and Financial Aid at Brownell-Talbot School (private school)
Nebraska Coordinator for Great Plains Association for College Admission Counseling
23 years in admissions/financial aid
20 years Telerecruiting experience
B.A.

Kelly S.

Thiel College, Director of Admissions
Carlow University, Associate Director of Admissions
Northeast Ohio Medical University, Assistant Director of Admission
La Roche College, Admissions Counselor
20 years admissions experience
3 years Telerecruiting experience
M.A.

Paula G.

MCP/Hahnemann University/Drexel University, Director Enrollment Management
The Wharton School, University of Pennsylvania, Sr. Associate Director
Temple University, Director MBA/MS Programs including Admissions as well as the Director of Academic Services for Temple University's Fox School of Business
Montclair State University, Assistant Dean, School of Business Management,
Taught in the Management Department at Temple University and Rider University
Consultant, Harcum College
40 years professional experience
20 years Telerecruiting experience
MBA and M.A. in Art History

Lizanne W.

SUNY Buffalo, Associate Director International Admissions
Career Services, Assistant Director
Financial Aid Counselor
Admissions Counselor
30 years professional experience
21 years Telerecruiting experience
B.A.

Jen S.

Allegheny College, Assistant Director of Admissions
Rudolf Steiner School, Director of College Counseling
New York University, Director of Operations for University Programs
Columbia University, Admissions reader (part-time)
16 years professional experience
12 years Telerecruiting experience
M.A. in Higher Education Administration

Cindy C.

College of New Rochelle, Assistant Director of Admissions
College of Mt. St. Vincent, Assistant Director of Admissions
Director of Guidance, Yorktown High School (NY)
Six years of experience in admissions and 17 years of experience in guidance counseling
21 years Telerecruiting experience
M.S. in Guidance and Counseling

Patrick O.

Adelphi University, Assistant Director of Admissions and Director of International Admissions
Northeastern University, Admissions Counselor
Queens College, International Student Advisor, Director for International Programs
22 years professional experience
19 years Telerecruiting experience
M.A. in Public Policy

Angela S.

Marymount College, Admissions Counselor
School Guidance Counselor
25 years professional experience
22 years Telerecruiting experience
Master's Degree in Counseling and Development

Diane M.

St. Thomas Aquinas College
Manhattanville College, Pace University, Dominican College, Rockland Community College,
Instructor
10 years professional experience
3 years Telerecruiting experience
Ed. D.

Rachel H.

Miami University of Ohio, Admission Counselor
3 years professional experience
3 years Telerecruiting experience
B.A.; in progress: M.S. in Clinical Mental Health Counseling at Johns Hopkins University

Waynica S.

University of Pittsburgh, Senior Assistant Director
City Charter High School, College Counselor
St. Edmund's Academy, Director of Admissions
12 years professional experience
7 years Telerecruiting experience
M.P.A.

Shanna B.

Alvernia University Senior Associate Director of Admission and Transfer Coordinator
Thiel College, Admissions Counselor
I-LEAD, Inc. Site Coordinator for I-LEAD and Harcum College
College Planning Network, College Planning Counselor
16 years professional experience
3 years Telerecruiting experience
Master in Education (M.Ed.)

Heather R.

Davis & Elkins College, Assistant Director of Admissions
24 years professional experience
14 years Telerecruiting experience
J.D., Duquesne University School of Law

Liz M.

University of Pittsburgh, Admissions Counselor
Harcum College, Admissions counselor
High School Guidance counselor for 10 years
15 years professional experience
11 years Telerecruiting experience
M. Ed School Counseling

Jessica F.

Georgia State University, Admissions Counselor,
University of Central Florida, Admissions Officer
Florida Gulf Coast University, Admissions Specialist
7.5 years admissions experience
14 years Telerecruiting experience
B.S. in Advertising

Renay S.

Baker University, Assistant Director of Admission and Financial Aid
Kansas Wesleyan University, Assistant Director of Admission
8 years of experience in Admissions
2 years Telerecruiting experience
B.S in Exercise Science and Physical Education

James M.

University of Dallas, Admissions Counselor
Georgetown University, Admission Counselor
University of North Georgia, Faculty
11 years professional experience
6 years Telerecruiting experience
M.F.A.

Beatrix H.

Shenandoah University, Assistant Director, Undergraduate Admissions for Transfer Recruitment
NAACP high school mentor and advocate (2016-present)
9 years professional experience
5 years Telerecruiting experience
M.S. in Psychology with a concentration in Leadership Coaching

Diane B.

St. Thomas Aquinas College, Assistant Director of Admissions.
10 years of college admissions experience.
24 years Telerecruiting experience
Masters in School Counseling

Kim S.

Hiram College, Assistant Dean of Admissions
Lakeland Community College, Admissions Counselor
Ohio University, Admissions for Online MBA programs
20 years professional experience
14 years Telerecruiting experience
B.A. in Communications

Danielle S.

York College, Senior Associate Director of Admissions
7 years admissions experience
3 years Telerecruiting experience
B.A. in Communications Arts

Danielle J.

Notre Dame of Maryland University, Senior Admissions Counselor,
School Counselor
8 years professional experience
2 years Telerecruiting experience
M.S. in School Counseling

Christine B.

College of Notre Dame of Maryland, Director of Admissions
Baltimore International College, Assistant Director of Admissions
40 years professional experience
11 years Telerecruiting experience
M.S. in Public Administration

Julie S.

Westminster College (PA), Assistant Director of Admissions
3 years Admissions experience and 17 years' experience as a High School Guidance Counselor
10 years Telerecruiting experience
Master of Education in Counselor Education

Wendy F.

Concordia College (NY), Interim Director of Admissions and Sr. Associate Director
25 years professional experience
18 years Telerecruiting experience
B.S. in Social Work

Angela B.

Slippery Rock University, Director of Graduate Admissions
Walsh University, Director of Graduate and Transfer Admissions
Hiram College, Associate Director of Admissions
Bethany College, Assistant Director of Admissions
10 years admissions experience
1-year Telerecruiting experience
Master of Arts in Educational Leadership

Christina M.

Mount St. Clare College, Admissions Counselor
Augustana College (IL), Admissions Counselor
Ashford University, Senior Admissions Specialist
Associate Director of Student Services at Ashford University
17 years professional experience
1-year Telerecruiting experience
B. A.

Jennifer S.

Bucknell University, Assistant Director of Admissions
11 years Telerecruiting experience
B.A.

Joy P.

Agnes Scott College, Senior Assistant Director of Admission
Dean of College Counseling, private school
12 years professional experience
8 years Telerecruiting experience
M.A.

Mariaelena P.

University of Rhode Island, Admissions Counselor
Keystone College and Elmira College, Admissions Counselor
Also 21 years' experience secondary education.
1-year Telerecruiting experience
B.A.

Kristin V.

Adelphi University, Associate Director of University Promotion and Outreach
17 years professional experience
14 years Telerecruiting experience
B.F.A.

Lisa L.

University of Rochester, Assistant Director of Admissions
Medaille College, Assistant Director of Admissions
24 years professional experience
7 years Telerecruiting experience
Master of Education

Andrew W.

Marymount University, Associate Director of Admissions
7 years' experience in college admissions and 21 years of experience as Directors/Deans of Admissions at private schools
28 years professional experience
21 years Telerecruiting experience
Ed. D.

Megan C.

Carnegie Mellon University, Associate Director of Admissions
Duquesne University, Assistant Director of Admissions
Point Park College, Admissions Counselor
18 years professional experience
7 years Telerecruiting experience
M.A.

Lindsey C.

St. Vincent College, Admissions Counselor

9 years professional experience

7 years Telerecruiting experience

M.A. in Counseling

Leslie R.

Adelphi University, Associate Director of Admissions

Boston College and SUNY Stony Brook, Residence Hall Director

11 years professional experience

4 years Telerecruiting experience

MSED

Alexa P.

Johnson & Wales University, Admissions Counselor

1-year Telerecruiting experience

B.S.

Tracy K.

SUNY Oneonta, Admissions Counselor

The Hackley School, Registrar's Office

6 years professional experience

8 years telerecruiting experience

B.S.



ATTACHMENT A - PRICING SHEET

Fill in and submit the following pricing table. If the Offeror's pricing structure differs from the above table, please include a copy of the alternate structure with detailed descriptions of the fees involved, but the table below must still be filled out for evaluation purposes. Evaluation will be based upon the equation below.

| Description | Cost |
|--|--------------|
| Cost per Name (0-2,500 names given) | |
| Cost per Name (2,501-5,000 names given) | See attached |
| Cost per Name (5,001-7,500 names given) | |
| Cost per Name (7,501-10,000 names given) | |
| Reporting Fees: Quantitative & Qualitative Data Report | |
| Administrative Fees: Script creation, caller training, etc. Please provide details! | |

Cost evaluation will be based on 5,000 names given for calling, with reporting and administration fee totals:

Cost of Names (5,000) _____ + Reporting Fees _____ + Administrative Fees _____ = Evaluation Total





3174 Arbour Lane
 Yorktown Heights, NY 10598
 Phone: 914-246-5955
 Fax: 815-550-8687
 gina@telerecruiting.com
 www.telerecruiting.com

Estimate for a Three-Attempt Calling Campaign

3/7/18

University of Mary Washington
 Procurement Services
 Eagle Village Executive Offices, Suite 480
 1125 Jefferson Davis Highway
 Fredericksburg, VA 22401

Calling Campaigns for Fall 2019, 2020, and 2021 Enrollment

| | |
|--|--------------------|
| 5,000 names with telephone numbers @ \$2.50 per name received | \$12,500.00 |
| 2,250 completed calls @ \$3.90 per call (estimated at 45%; see below) | \$8,775.00 |
| 1,750 personalized VM messages @ \$1.00 per message (estimated at 35%) | \$1,750.00 |
| <u>Set-up fee/final report/caller ID fee for two to four campaigns (see below)</u> | <u>\$1,500.00</u> |
| Total estimated cost | \$24,525.00 |

NOTES:

Telerecruiting guarantees attempting every student up to three times. Whenever possible, Telerecruiting prefers to receive both a home and cell phone number for each student as this increases the likelihood of our being able to complete the call with the student or a parent.

Telerecruiting can attempt telephone numbers located in the U.S. and Canada. We can call international students if they have a U.S. phone number. The pricing structure above does not include calls to countries other than the U.S. or Canada. Telerecruiting Corp. can make calls to other countries, but there would be an additional cost for this (price varies based on the countries being called).

Telerecruiting estimates that we will complete a phone call with a student and/or parent for 45% of the inquiry names received. This is an estimate, and the final percentage of reached inquiries could be slightly higher or lower than 45%. Telerecruiting estimates that we will leave a voicemail message for 35% of the inquiry names received. This is an estimate, and the final percentage of inquiries for whom we leave a message could be slightly higher or lower than 35%. In the event that we are asked to call incomplete applicants or accepted students, please know that success rates for calls to incomplete applicants and accepted students would be higher than success rates with inquiry calling projects. This is because students are sometimes on an institution's inquiry database for a number of years, and in some cases the information can become out-of-date if a student moves. But with applicants and accepted students, the information in

your database should be up-to-date, thereby increasing the likelihood that we will be able to reach the student.

All students will be attempted up to three times (if we reach a student on the first attempt we do not attempt them again and if we reach a student on our second attempt, the student is not attempted a third time). If there are two telephone numbers provided for a student, our caller will attempt each phone number one time before attempting the same number two times. On the third attempt, if our caller reaches an answering machine, our caller will leave a personalized voicemail message using the student's name and if desired, the name of the student's admissions counselor.

Note: our callers keep accurate records when attempting students regarding whether a phone number has voicemail, so that if we need to attempt a student a third time, our callers will use their professional judgement regarding which of the two numbers previously attempted is the best phone number to attempt on the third try.

The fees listed above are all-inclusive. They cover all costs related to the following:

- ✓ Implementing a calling campaign (script development and all training materials for all callers)
- ✓ Daily follow-up to the Director of Admissions and Admissions Staff during the course of the calling campaigns.
- ✓ All telephone costs as well as all fees associated with the caller ID service.
- ✓ All costs related to writing the final report and compiling the master spreadsheet.
- ✓ There are no additional fees unless UMW asks Telerecruiting Corp. to contact students living outside the U.S. or Canada.

Project invoices will be submitted at the conclusion of the calling campaign after the final report and master spreadsheet have been submitted.

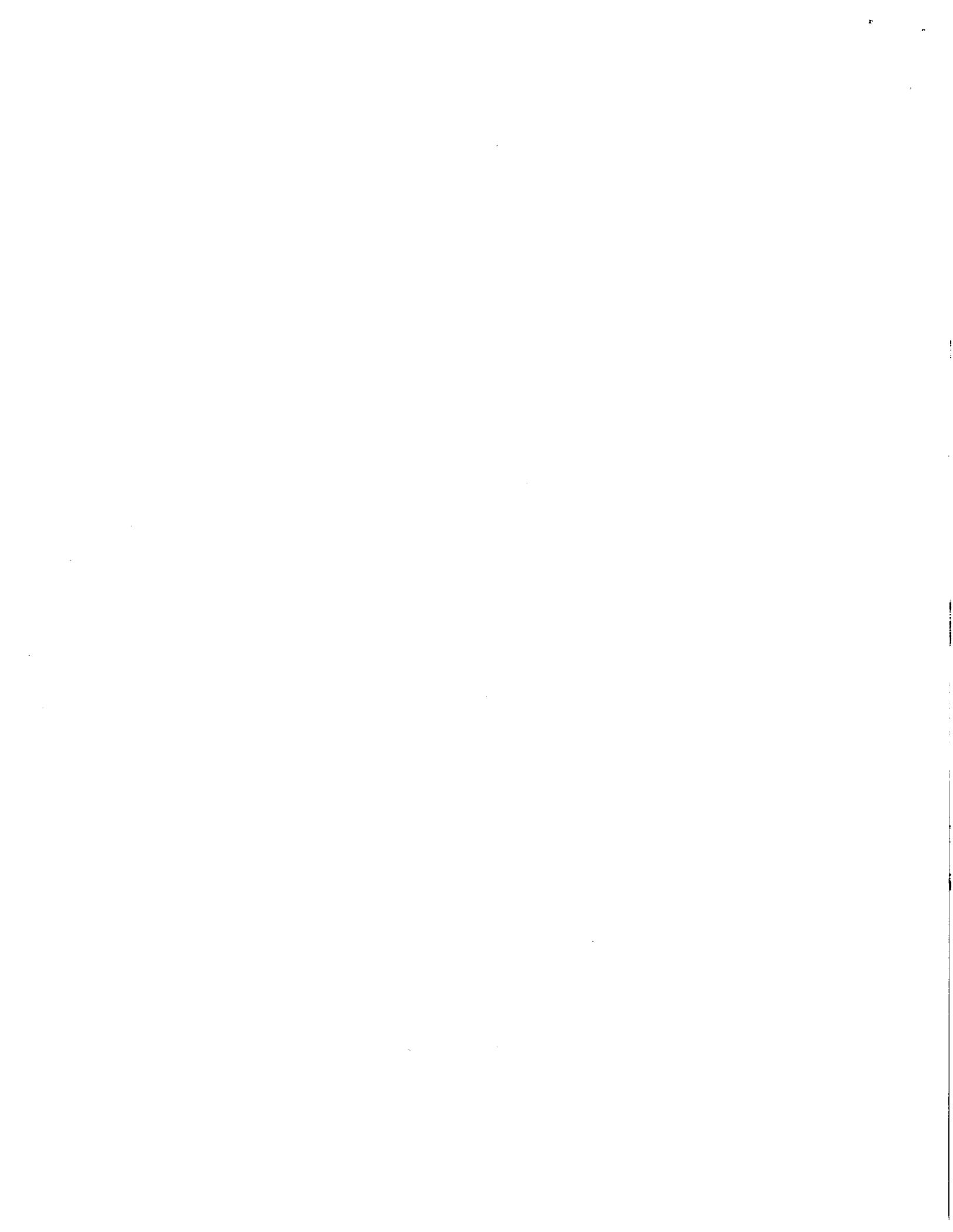
ATTACHMENT B - REFERENCES

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

| Reference #1 | |
|-------------------|---|
| Agency Name | Augustana College |
| Contact Name | Kent Barnds , V.P. for Enrollment |
| Email | wkentbarnds@augustana.edu |
| Phone # | 309-794-7662 |
| # Years w/ Agency | 10 years |
| Solution Provided | Calling campaigns to inquiries, incomplete applicants & accepted students |

| Reference #2 | |
|-------------------|---|
| Agency Name | Adelphi University |
| Contact Name | Kristen Capezza, Executive Director University Admissions |
| Email | kcapezza@adelphi.edu |
| Phone # | 516-877-3021 |
| # Years w/ Agency | 21 years |
| Solution Provided | Calling campaigns to inquiries, incomplete applicants & accepted students |

| Reference #3 | |
|-------------------|---|
| Agency Name | University of Texas at Dallas |
| Contact Name | Dr. Wray Weldon, Assistant Provost Enrollment Management |
| Email | wray.weldon@utdallas.edu |
| Phone # | 972-883-6994 |
| # Years w/ Agency | 20 years |
| Solution Provided | Calling campaigns to inquiries, incomplete applicants & accepted students |



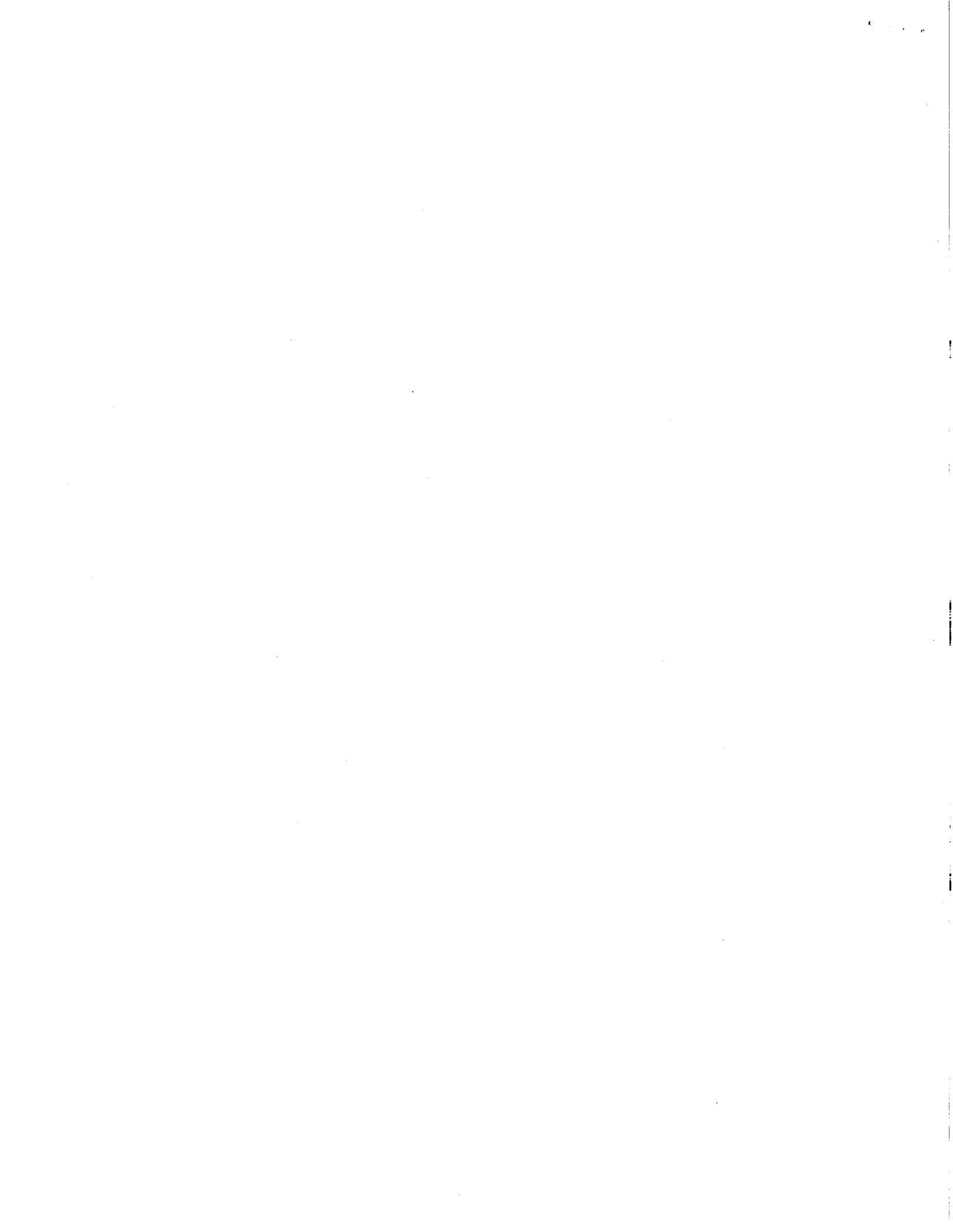
ATTACHMENT B - REFERENCES

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

| Reference # 4 | |
|-------------------|--|
| Agency Name | NEOMED College of Pharmacy |
| Contact Name | James Barrett, Director of Admissions |
| Email | jbarrett1@neomed.com |
| Phone # | 330-325-6274 |
| # Years w/ Agency | 2 years |
| Solution Provided | Inquiry calls to prospective Pharmacy students |

| Reference # 5 | |
|-------------------|---|
| Agency Name | St. Joseph's College, Brooklyn |
| Contact Name | Christine Murphy, Vice President for Enrollment |
| Email | cmurphy@sjcny.edu |
| Phone # | 718-940-5820 |
| # Years w/ Agency | 3 years |
| Solution Provided | Calls to inquiries and accepted students |

| Reference # 6 | |
|-------------------|---|
| Agency Name | Doane University |
| Contact Name | Kyle McMurray, Director of Admissions |
| Email | kyle.mcmurray@doane.edu |
| Phone # | 402-826-8222 |
| # Years w/ Agency | 10 years |
| Solution Provided | Calls to inquiries, incomplete applicants and accepted students |



ATTACHMENT B - REFERENCES

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

| Reference # 2 7 | |
|----------------------------|---|
| Agency Name | Dakota Wesleyna University |
| Contact Name | Dan Bonte, Coordinator Undergraduate Admissions |
| Email | dabonte@dwu.edu |
| Phone # | 605-995-2650 |
| # Years w/ Agency | 9 years |
| Solution Provided | Calling campaigns to inquiries |

| Reference # 3 8 | |
|----------------------------|--|
| Agency Name | Mt. St. Mary's University |
| Contact Name | Dean Kilgour, Vice President for Enrollment |
| Email | dkilgour@msmu.edu |
| Phone # | 213-477-2746 |
| # Years w/ Agency | 15 years |
| Solution Provided | Calling campaigns to inquiries and accepted students |

| Reference # 4 9 | |
|----------------------------|--|
| Agency Name | Agnes Scott College |
| Contact Name | Alexa Gaeta, Vice President for Enrollment |
| Email | agaeta@agnesscott.edu |
| Phone # | 404-471-6423 |
| # Years w/ Agency | 8 years |
| Solution Provided | Calling campaign to inquiries, incomplete apps & accepted students |

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: Telerecruiting Corp.

Preparer Name: Gina R. Campbell Date: 3/7/18

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 One: Small Business Small and Woman-Owned Business Small and Minority-Owned Business

DSBSD Certification No.: _____ Expiration Date: _____

Section B SEE ATTACHED

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 SEE ATTACHED

| 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 C – Small Business Subcontracting Plan

Telerecruiting Corp. does not intend to use subcontractors. Please note that Telerecruiting Corp. meets the definitions (Code of Virginia, 2.2-4310) as a small and woman-owned business. However, as a Non-Virginia Based Business, I am not eligible to apply for certification by DSBSD until I am certified by New York State. Telerecruiting Corp. is currently in the process of applying for certification by New York State in order to then be eligible to apply for certification by DSBSD

ATTACHMENT F

RFP 18-788 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 **February 27, 2018 by 2PM 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: **March 9, 2018 @ 2PM 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.
- Description of the Offering firm's history and expertise.
- Resumes of proposed Call Team and Project Manager
- 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. **No exceptions requested.**

1-800-468-5614; 540-654-2000

www.umw.edu

Correct classification if not 2018 h.s. grad. _____

1) **Most important factors in selecting a college:**

| | |
|------------------------|---------------------------------------|
| Major field: _____ | Study Abroad and Internships |
| Location | Career & graduate school preparation |
| Cost/Financial aid | Overall atmosphere/residential campus |
| Size/Access to faculty | Active social life |
| Academic reputation | Athletics: _____ |

Other: _____

1a) Confirm major if student didn't cite. For a complete list of areas of study go to <https://www.umw.edu/study/>

2) **Will financial aid be an important consideration?** yes no somewhat
UMW is consistently ranked as one of the country's top best value schools by such publications as Fiske Guide to Colleges (2018), The Princeton Review and Kiplinger's Personal Finance. Students who apply by February 1 will receive full consideration for merit and curriculum scholarships. It is also important to note that the loan debt of our graduates is significantly lower than the graduates of the other publics in Virginia (5th among Virginia colleges and universities in Virginia).

Students who choose to interview on-campus be considered for scholarships ranging from \$1,000 to \$7,000. The interview must be completed by Feb. 1 for consideration

If asked, academic scholarships range up to \$4,000 a year for in-state and up to \$9,000 for out-of-state. Students can visit the URL below to get a sense of criteria for these scholarships.

<http://www.umw.edu/admissions/undergraduate/checklist/firstyear-scholarships/>

Test Optional applicants are eligible for Curriculum Scholarships:
<http://www.umw.edu/admissions/undergraduate/checklist/test-optional/>

3) **Have you made a formal campus visit?** yes no has been on campus
If yes, ask student to discuss his/her visit experience. If student has not visited or only been on campus informally, invite the student to a formal campus visit. Note: for students who have been on campus informally, determine reason (attended an athletic or cultural event, visiting a friend or sibling, etc.)

We are located in Fredericksburg within an hour's drive of both Washington, D.C., and Richmond, so our location is ideal for obtaining internships. The campus is really beautiful with classic red-brick Georgian architecture and wooded areas and our residence halls are amazing, so I think you'll be really impressed if you visit.

Sample Script

There are several visit options available. Callers: discuss all options with students and strongly encourage students to schedule an on-campus interview in order to be considered for scholarship money ranging from \$1,000 - \$7,000. If asked, there will also be visit events in March and April for accepted students.

Visit plans/comments _____

___ Check here if student wants a call from Admissions to schedule an appt.

- 4) UMW has more than 120 student clubs and organizations, 23 varsity sports and 16 club sports plus an active intramurals program. **Would you like to receive an email contact from a current student to learn more about student life?**
If yes, confirm email address and note if the student self-initiates a request to learn more about a particular topic or interest.
- 5) **I feel that the University of Mary Washington might be a great match for you, so I would strongly encourage you to apply, and I can give you a fee waiver code to enter on the application (UMW52). Do you plan to apply?**
- | | | |
|----------------------------------|--------------------------|----------|
| Very interested | One of top three choices | Go to #6 |
| Somewhat interested | Will definitely apply | Go to #6 |
| Uncertain (see below) | Undecided about applying | Go to #6 |
| No longer interested | Not planning got apply | Go to #7 |
| Interested, but not for Fall '18 | Determine plans. | Go to #6 |

If **uncertain**, student's attitude was: **Enthusiastic Neutral Not enthusiastic**

- 6) You can apply on-line using the Common Application or the Coalition Application. We also require your high school transcript, at least one letter of recommendation, and test scores. We are Test Optional for students with a challenging high school curriculum and a high school GPA of 3.5 or higher. Your application needs to be completed by February 1 for full scholarship consideration.
- 6a) Confirm mailing/email address. Conclude call based on conversation (looking forward to you visiting, applying, encourage student to visit website, etc.)
- 7) **Reason if no longer interested.** (*Proceed to #7a*)
- | | |
|--|--|
| Doesn't have major: _____ | Size (too big or too small) |
| Wants a larger urban area | Offered athletic scholarship elsewhere |
| Doesn't want Virginia area | Does not offer desired varsity sport |
| Too far from home or too close to home | Overall fit/atmosphere |
| Academic reputation (wants more selective) | Cost/financial aid |
| Doesn't want to apply to any more schools | Already made enrollment decision |
- Other: _____

7a) **Name of enrolling college** _____

We wish you the best of luck with your future studies.

STRENGTHS FOR UNIVERSITY MARY WASHINGTON

Majors

- More than 80 majors, minors and courses of study
- Students can double major or design their own major.
- Specialized advising for pre-professional programs in law, dentistry, medicine, and veterinary medicine
- Five-year pathway programs in Education, Business and Geospatial Analysis
- Accelerated paths: 3+3 to JD with GMU's Scalia Law School, 3+4 to PharmD with Shenandoah's Bernard J. Dunn School of Pharmacy
- Honors Program
- Three colleges: College of Arts & Sciences, College of Business, College of Education
- Most popular majors include business administration, English, Psychology, History, International Affairs, Political science, Historic preservation, Computer Science, modern languages & literature, and geography

Location

- Historic Fredericksburg, VA
- Fredericksburg was rated the 5th best college town by USA Today
- Within an hour of Washington D.C., our nation's capital, and Richmond, the state capital offering incredible opportunities for internships
- Fredericksburg has VRE (Virginia Railway Express) commuter train access to Washington, DC
- UMW has a beautiful 176-acre campus
- The campus and community are both extremely safe
- Lots of outdoor recreation opportunities such as hiking the Blue Ridge Mountains, stand-up paddle and kayak the Rappahannock Rive, Bike the Fredericksburg canal park
- Central Park, the 2nd largest unenclosed mall on the East Coast with over 255 businesses is located in Fredericksburg

Size/Access to Faculty

- Ideal size with the personal attention of a small, private college and the opportunities of a larger university
- undergraduates
- Student-faculty ratio is 14:1
- The average class size is 19
- First Year Experience Seminar (year-long course) is capped at 15 students.
- All classes are taught by professors – there are no teaching assistants
- Discussion-based seminars including one in the first semester
- 7 UMW Master teachers were names to Princeton Review's *The Best 300 Professors*.
- 99% of recent grads were extremely satisfied with the quality of the faculty.
- 97% of recent grads feel UMW taught them to speak and write effectively

Strengths of UMW -Sample of Training Materials Used by Call Team

Retention rate

- The most recent graduation rate for UMW students is 70%
- UMW is one of the top 10 public universities in the country for its four-year graduation rate.

Academic Reputation

We are proud to be recognized for:

Our unfailing dedication to quality education

- *Fiske Guide to Colleges*, 2018: "Best Buy School," one of only two colleges in Virginia and the District of Columbia reaching this distinction
- *U.S. News & World Report*, 2018: "America's Best Colleges," seventh among public Southern universities in the "Top Public Regional Universities – South" category
- *Forbes*, 2017: "America's Top Colleges," 276th of 660 undergraduate institutions
- *The Princeton Review*, 2018: "The Best 382 Colleges"
- *Money Magazine*, 2017: 314th among 711 schools listed as Best Colleges
- 100 Best Values in Public Colleges, *Kiplinger's Personal Finance Magazine*

Our low student debt after graduation

- #1 in state in #44 in nation on the 2017 Student Debt Repayment Success Indicator Study
- *LendEDU's "Student Loan Debt 2017:"* 35th among public colleges, 82nd among colleges overall
- *The 2017 Student Loan Report*: 5th among Virginia colleges and universities
- *The 2017 Student Loan Report*: first in Virginia, 44th overall, in student debt repayment success

Fostering a supportive, bold, and empowered community

- *Peace Corps*: "Top Producing Colleges and Universities" for more than a decade; in 2017, ranked second among small colleges and universities with fewer than 5,000 undergraduates
- *The Princeton Review*: "2017 Guide to 353 Green Colleges"

Cost/Financial Aid

- Academic and Curriculum Merit Scholarships available (must complete application process by February 1)
- Consistently rated as a Best Value school by numerous organizations/guidebooks including *Forbes*, *Fiske Guide*, *Peterson's*, *Princeton Review*, *Kiplinger Personal Finance Magazine*
- Our tuition and fees are at least 30% less than many top private liberal arts and sciences colleges
- We administer more than \$57 million in financial assistance

Experiential Learning

Available through undergraduate research, internships, service-learning and study abroad. See below for more details.

Opportunities for Research

- We devote more than one quarter of a million dollars each year to support student research, fieldwork, travel, scholarship, and our unique Summer Research Institute
- The annual UMW Undergraduate Student Research and Creativity Symposium showcases the excellent undergraduate student research performed at UMW under the expert guidance of faculty mentors
- Students often have the opportunity to present their findings at professional conferences

Career/Graduate School Preparation

- 95% of recent graduates are employed or in graduate school.
- Recent grads have attended prestigious graduate and professional schools such as Stanford, Princeton, Harvard, Northwestern, UC Berkley and Rhode Island School of Design, Emory and many more

Internships

Examples of recent internships:

- ✓ American Red Cross
- ✓ Department of Homeland Security
- ✓ State Department
- ✓ FBI
- ✓ Madison Square Garden
- ✓ Walt Disney World
- ✓ National Public Radio
- ✓ United States Embassy
- ✓ Central Intelligence Agency
- ✓ Smithsonian Museum

Study Abroad

- More than one third of UMW students study abroad before graduation
- More than 15 programs are led by UMW faculty
- 5 exchange programs
- 121 approved programs in 56 countries
- \$217,030 granted in UMW study abroad scholarships in the past 3 years

Athletics

- 23 NCAA Divisor III intercollegiate sports, Capital Athletic Conference
- 1 in 10 students is a scholar-athlete
- 16 Club sports
- Intramurals program
- State of the art fitness center for all students, indoor tennis center

Strengths of UMW -Sample of Training Materials Used by Call Team

- 21 of our varsity teams have gone on to compete in national championship tournaments
- The Eagles have produced 309 All-Americans
- The Eagles have captured the CAC All-Sports Award 12 times (given to the overall best athletics program)

Overall Atmosphere

- 99% of recent grads feel satisfied with their overall education
- Supportive, friendly community
- Dynamic guest speakers
- Vibrant fine arts
- Green Campus – UMW is ranked among the nation's top "green colleges" in the Princeton Review's Guide to 353 Green Colleges, UMW was recognized for its robust on-campus sustainability program

Arts & Culture

Great Lives Lecture Series

UMW Music

UMW Philharmonic Orchestra

UMW Theatre & Dance

UMW Galleries

James Monroe Museum

Diversity

- Students represent over 40 states and 56 countries
- About 25% self-identified minorities
- According to The Social Mobile Index (201), UMW provide pathways for social and economic mobility, third in the state, 140th nationally

Service

- Last year, UMW students and staff donated 15,500+ hours to community service
- Students are committed to causes like Habitat for Humanity, Best Buddies, Relay for Life, Head Start and local charities and food banks
- UMW has been on the President's Higher Education Community Service Honor Roll for five consecutive years
- UMW is one of the Peace Corps' largest source of volunteers among small colleges
- Many graduates participate in other service programs such as AmeriCorp's City Year and Teach for America
- Our students and faculty have founded international service projects like Students Helping Honduras and Hungry Brains, a tutoring program for local elementary and middle school students
- Alternative spring break or Fall break options with Habitat for Humanity work

Active Social Life

- There are more than 120 student clubs and organizations
- Concerts, weekly showings of the latest movies for \$1, open-mic night
- Campus traditions like Devil-Goat Day, a campus competition that pits freshman and juniors against sophomores and seniors, Multicultural Fair, Octoberfest, and Cart's frozen custard
- Road trips to Kings Dominion theme park, Splashdown Water Park, concerts at the Hippodome, Redskins football, shopping at Potomac Mills to name a few

Residential Life

- 17 residence halls and apartments
- Assurance of on-campus housing first two years
- 90% of first-year students live on campus
- Live in a residence hall with sweeping staircases, hardwood floors, and 12-foot ceilings or in an apartment with granite countertops and stainless steel appliances
- Living learning communities are available which meld residential living,



BACKGROUND INFORMATION - UMW CALLING CAMPAIGN

Who we are calling - We are UMW's hottest prospects who have not yet applied.

Project Objective - The primary objective is for the student to apply to UMW by February 1. As an extra incentive, we can encourage students to use the fee waiver code which works on both the Comon App and the Coalition App (see below). We also want to make sure that students are aware of a scholarship available to students who interview on campus by March 1.

Coalition App

UMW accepts both the Common Application and the Coalition Application. Members of the Coalition include a diverse group of public and private universities. Coalition schools provide substantial support to lower-resourced and underrepresented students. For more on the Coalition App go to: <http://www.coalitionforcollegeaccess.org/>

FAFSA Deadline - The FAFSA deadline is Feb. If the family has already filed the FAFSA, they should add UMW's FAFSA code right away. That way, as soon as the student is accepted, he/she can be packaged. Students do not need to wait until they are accepted to add UMW's code to their FAFSA. The sooner the Student Aid Report is sent to UMW's Financial Aid Office, the better.

Requests for Financial Aid contact

If students or parents request a contact from the Financial Aid Office, you can assure them that someone will get back to them. Most likely, it will be the student's admissions counselor, but you don't need to get specific about this.

Requests for faculty contact - Most likely, the faculty will make the initial contact via email. So be sure to confirm the student's email address.

Requests for coach contact - Advise the student to email/call the coach ASAP and also to complete the online Recruit questionnaire immediately.

Overnights - UMW will sponsor an overnight for admitted students. In the meantime, students can Shadow a student for a day (attend class, eat lunch on campus, etc.)

When quoting specific stats

As you know, some statistics change every year and even within the course of the year (total UG enrollment, # of student clubs and organizations, etc.), so when answering questions that pertain to specific numbers, always preface your response with "approximately."

Events for Accepted Students

There will be events in March and April specifically designed for admitted students. But for now, strongly encourage the student to visit before March 1 and to schedule an interview so that the student can be considered for the new Taking Flight scholarship which ranges from \$1,000 t \$7,000. I wouldn't mention the events for accepted students unless a student specifically asks if there will be events.

FACT SHEET FOR UNIVERSITY OF MARY WASHINGTON

1301 College Avenue
Fredericksburg, VA 22401

www.umw.edu

President: Dr. Troy D. Paino

Office of Admissions is located in Lee Hall, Room 301
Admissions is open Monday – Friday from 8 am – 5 pm
Admissions phone: 800-468-5614; 540-654-2000
Admissions FAX: 540-654-1857
Email: admit@umw.edu
Director of Admissions: Melissa Yakabouski

Financial Aid Office: located on the 2nd floor of Lee Hall
Director of Financial Aid: Heidi Hunter-Goldsworthy
Financial aid phone: 540-654-2468
Financial aid FAX: 540-654-1858
Financial aid email: finaid@umw.edu
Website: www.umw.edu/financialaid/

SAT code: 5398
ACT code: 4414
FAFSA code: 003746

| 2017-2018 Costs | Virginia Resident | Non-Virginia Resident |
|------------------------|--------------------------|------------------------------|
| Tuition & Fees | \$12,128 | \$27,374 |
| Room & Board | \$11,600 | \$11,600 |
| Total | \$23,728 | \$38,974 |

Residence hall rates vary by residence hall and room type (single vs. double or apartment). See link below for specific details.

<http://www.umw.edu/residencelife/before-you-get-to-campus/housing-selection/rates/>

First-year students participate in the Eagle Meal Plan which allows unlimited access to all-you-can-eat buffets plus \$200 in flex dollars to use at retail eateries. You can stop in just to get an apple and a cup of coffee or to enjoy a multi-course meal.

Other estimated expenses:

| | |
|--------------------|---------|
| Books and supplies | \$1,200 |
| Personal | \$1,500 |
| Transportation | \$1,700 |

| | |
|------------------------------|---|
| Type of institution | Co-ed, public institution, liberal arts & sciences |
| Location | Fredericksburg, VA (about 1 hour south of Washington D.C. and 1 hour from Richmond, the VA state capital) |
| Campus | 176 acres Go to link below for a virtual tour and to see the beautiful red-brick buildings/Georgian architecture http://www.umw.edu/admissions/#virtualltour |
| Majors | 80 major, minors, academic programs |
| Calendar | Fall and Spring terms, 5-week terms are held at the Fredericksburg Campus in the summer |
| Enrollment | 4,400 undergraduates and about 327 graduate students |
| Class size | Average class size is 19 |
| Student-faculty ratio | 14:1 |
| Student clubs | 120+ |
| Cars on campus | As a general rule, first-year residents cannot have cars. |
| Nearby hotel | Hyatt Place (offers special rates for UMW visitors) 540-654-3333 Located across the highway from the main campus in Eagle Village |
| Nearest airports | Reagan National Airport and Dulles Airport |
| Transportation | <u>Greyhound Bus Lines</u> 1400 Jefferson Davis Hwy., Fredericksburg (downtown) Main telephone #: 540-373-2103 <u>Amtrak</u> trains stop at the Fredericksburg train station and offer service north to New England and south to Florida. <u>Virginia Railway Express (VRE)</u> The <u>Virginia Railway Express (VRE)</u> is the fastest and most convenient way to make day trips Washington or to make Metro connections to the Washington, D.C. airports. |

2017-2018 Athletic Staff

NCAA Division III, Capital Athletic Conference (CAPC)

The Eagles have captured the CAC All-Sports Award 12 times (given to the overall best athletics program)

All phones begin with the 540 area code and the exchange 654 unless otherwise noted
Example: 540-654-1867 for the Director of Athletics.

Some teams may be full. Advise any student who wants to play varsity athletic to contact the coach ASAP and to also complete the online Sport Recruit Questionnaire:
<http://www.umweagles.com/frontrush>

| | | | |
|--------------------------|----------------|--------------|----------------------|
| Director of Athletics | Ken Tyler | 1867 | ktyler2@umw.edu |
| MEN'S VARSITY | COACH | PHONE | EMAIL |
| Baseball | Wayne Riser | 1882 | wriser@umw.edu |
| Basketball | Marcus Kahn | 1887 | mkahn@umw.edu |
| Cross country | Kunle Lawson | 1886 | alawson@umn.edu |
| Equestrian | Teresa Seay | 891-7101 | tbett51b@umw.edu |
| Golf | Sam Oglesby | 703-727-0234 | sogles5fm@umw.edu |
| Lacrosse | Drew Delaney | 1883 | adelane2@umw.edu |
| Soccer | Jason Kilby | 1875 | jkilby@umw.edu |
| Swimming | Abby Brethauer | 1889 | abrethau@umw.edu |
| Tennis | Todd Helbling | 2486 | thelblin@umw.edu |
| Track & Field | Kunle Lawson | 1886 | alawson@umn.edu |
| MEN'S CLUB SPORTS | | | |
| Rowing | Richard Adams | 703-850-4328 | radams2@umw.edu |
| Rugby | Min Sae Chae | 703-314-7878 | minsawchae@yahoo.com |

Fact Sheet -Sample of Training Materials Used by Call Team

| <u>WOMEN'S VARSITY COACH</u> | | <u>PHONE.</u> | <u>EMAIL</u> |
|------------------------------|------------------|---------------|-------------------|
| Basketball | Deena Applebury | 1888 | dapplebu@umw.edu |
| Cross country | Kunle Lawson | 1886 | alawson@umn.edu |
| Equestrian (Riding) | Teresa Seay | 891-7101 | tbett51b@umw.edu |
| Field hockey | Lindsey Barbacow | 2166 | lelliot2@umw.edu |
| Golf | Sam Oglesby | 703-727-0234 | sogles5fm@umw.edu |
| Lacrosse | Caitlin Moore | 1320 | ceric5ne@umw.edu |
| Soccer | Corey Hewson | 1871 | chewson@umw.edu |
| Softball | Dee Conway | 1885 | dconway@umw.edu |
| Swimming | Abby Brethauer | 1889 | abrethau@umw.edu |
| Tennis | Patrick Catullo | 2489 | pcatullo@umw.edu |
| Track & Field | Kunle Lawson | 1886 | alawson@umn.edu |
| Volleyball | Matt Troy | 2168 | mtroy@umw.edu |
| <u>WOMEN'S CLUB SPORTS</u> | | | |
| Rowing | Richard Adams | 703-850-4328 | radams2@umw.edu |
| Rugby | Kris Kabza | 842-0731 | kkabza@ume.edu |

Visit Opportunities: <http://www.umw.edu/admissions/visit/>

Tours & information sessions: Learn about UMW and take a student-led tour. Separate sessions are offered for high school students, transfer students, and those interested in our graduate courses. Sessions are held Monday through Friday at 10:30 a.m. and 2 p.m. and most Saturdays at 10:30 a.m. Registration for sessions is in Lee Hall, room 301.

Transfer information sessions: Learn about the transfer admissions process at UMW and take a student-led tour. Sessions will be held on Wednesday afternoons beginning at 3:30 p.m. with the campus tour immediately following. Registration for sessions is in Lee Hall, room 301.

Open houses: Get a glimpse of UMW academics, athletics, and student life. See classrooms, residence halls, and other key campus spots.

Monday, February 19

Friday, March 30

Registration opens at 8:30 am and sessions run through 2 pm. From 2 to 3 pm, tours are available including tours of the residence halls, science facilities, theatre department, art galleries and studio art facilities, the library, etc.

The tentative agenda for open house events is available online at:

<http://www.umw.edu/admissions/wp-content/uploads/sites/6/2015/08/Tentative-Agenda-Fall-2017.pdf>

High school seniors will have the opportunity to interview with Admissions staff. Interviews will place you in consideration for a "Taking Flight" scholarship that ranges between \$1,000-\$7,000. They will be held every 20 minutes between 12-3:40 p.m. in Lee Hall, Suite 301. Please check back soon for registration.

Please note pre-registration will close the weekday before the event, but on-site registrations are warmly welcomed; please arrive by 8:30 a.m. in the Anderson Center so we may register you on-site. An email will be sent a few days prior to the event with any final details. We look forward to seeing you on campus! Register by selecting a date listed below.

Shadow a student: Get up close and personal! Pick your visit (fall or spring) based on your academic interests and follow a current student through a typical day on campus. Reserved for high school seniors. Students can register online. They are available mid-January through mid-April, but not during Spring Break (March 5 – 9).

Interview: Applying to UMW as a first-year student? Share who you are with our Admissions staff directly. Interviews are not required, but will place you in consideration for a "Taking Flight" scholarship that ranges between \$1,000-\$7,000. Interviews are

reserved for high school seniors and will occur through February 1, 2018 for fall 2018 admission candidates.

Spring 2018 Academic Calendar

Students should check the academic calendar before scheduling a visit. (See below.)

Spring 2018 classes begin on Tuesday, January 15

Last day of classes is April 27.

<http://academics.umw.edu/calendar/spring-2018/>

Admissions Checklist: <http://www.umw.edu/admissions/undergraduate/checklist/>

Suggested filing dates:

- Nov. 1 – Early Decision (notification by December 10 and reply date of January 10)
- Nov. 15 – Early Action (notification by January 31 and reply date of May 1)
- Feb. 1 – Priority Filing Date (notification by April 1 and reply date of May 1) *UMW is currently accepting applications on a space available basis.*

Prospective high school seniors have the option to interview with our Admissions staff as part of the admissions process. Students who interview in person may have the opportunity to be considered for a “Taking Flight” scholarship that ranges from \$1,000 to \$7,000.

First Year Admission Checklist

Use the checklist below to be sure you’ve got everything covered.

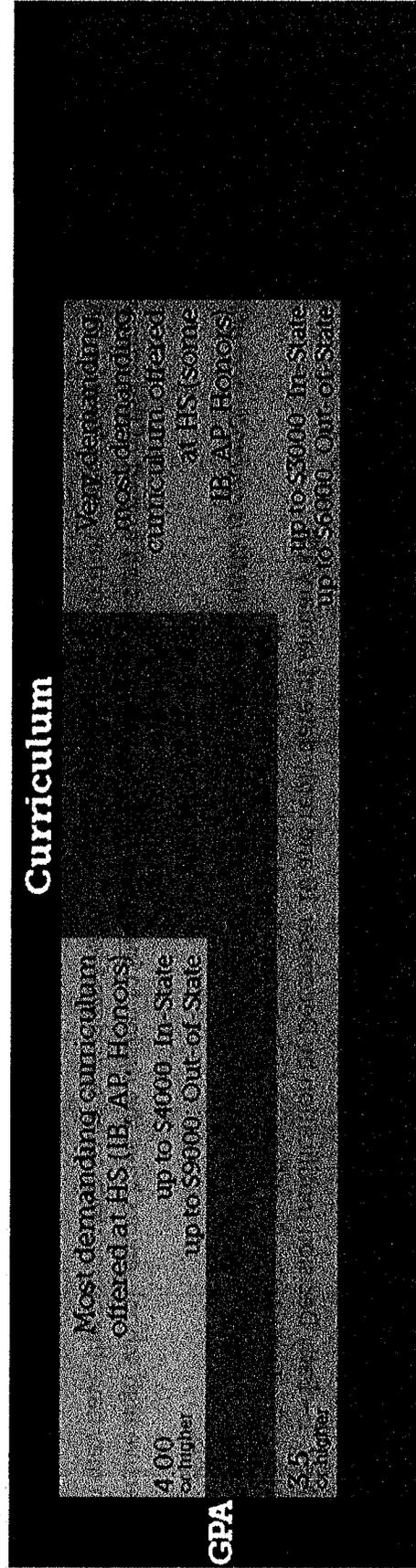
- Apply online through The Common Application or the Coalition Application with all accompanying materials, including your essay and the application fee (or approved waiver), to UMW.
- Create a ZeeMee profile to bring your application to life! Share your passion, talents, and interests through videos or photos directly with your admissions counselor. Don’t have ZeeMee? Get it for free at www.zeemee.com. Include your ZeeMee link within your application for admission.
- If you are requesting review for the Honors Program, Student Transition Program, or Pre-Nursing 1+2+1 Plan, please indicate this in the Common Application and review the Admission to Special Program details.
- If you’re requesting review under the binding Early Decision process, you must invite your counselor to sign the Early Decision Agreement before submitting your application. If you’re not able to gather signatures electronically, you may print the Early Decision Agreement and send to UMW. This form **MUST** be signed by the student, parent or legal guardian, and your high school counselor and is required to complete your application.
- Ask your guidance counselor to complete and sign the Secondary School Report, included on the Common Application, and provide a copy of your official high school transcript. (Home-schooled applicants should provide documentation of their educational experiences, as well.)
- If you completed college work during high school, request that an official college transcript be sent to UMW once the coursework is graded.
- Submit at least one letter of recommendation. You may invite your guidance counselor, teacher, or school official.

- Request your standardized test results be sent directly to UMW (SAT CEEB 5398, ACT 4414). Notify Admissions if you've taken the SAT or ACT using something other than your full legal name. UMW superscores your EBRW (evidence-based reading and writing) and math scores regardless of test date and we will take ACT scores attached to your strongest composite score.
- Read about our test optional policy (see below).
- Ask your high school to send your mid-year grades to UMW so that the Admissions Committee will have your most current information.
- If you're filing a Free Application for Federal Student Aid (FAFSA), please submit it by February 1, using the UMW code 003746.

We can't wait to get your application! We'll send you an email when we receive it and let you know if anything's missing. Please know that it's your responsibility to make sure your file is complete and to keep copies of all application materials.

UMW Test Optional Policy

First year applicants to the University of Mary Washington who maintain at least a 3.5 cumulative high school grade point average in a challenging course of study may request to be considered for admission to the university without standardized test scores. Applicants should request test optional review on their application for freshman admission. Students applying for merit-based scholarships, including the Washington and Alvey Scholarship, would be ineligible for this program. **Students applying test optional may qualify for other endowed scholarships and the new curriculum based program (details shown below)**. To be considered for curriculum based scholarships, first year students must meet the February 1 admissions filing date. The chart below is based on the fall 2018 entering class.



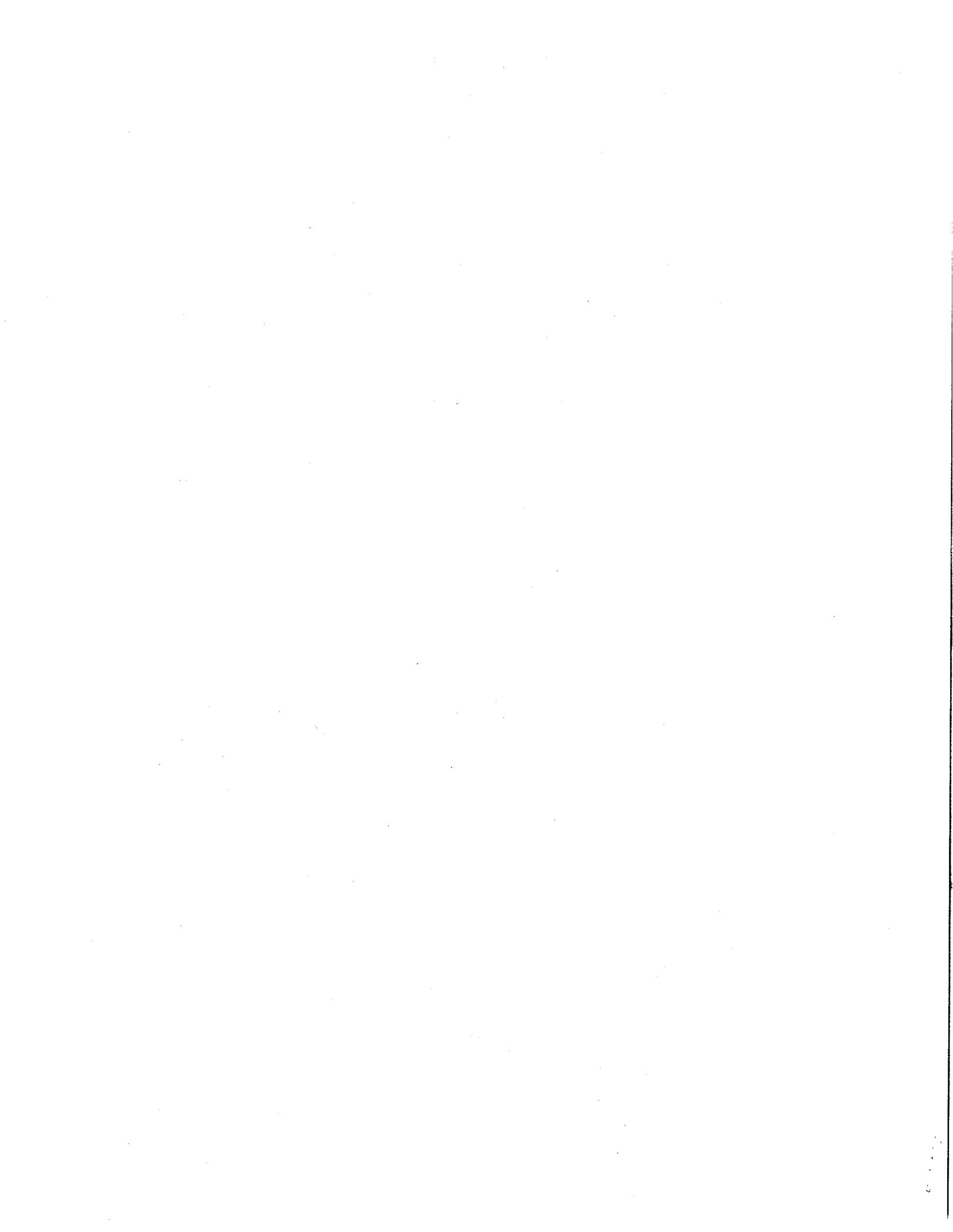
GPA

Exceptions to test optional review include:

- Students applying for admission to the UMW Honors Program
- Students applying for admission to the Pre-Nursing (1+2+1 plan) Program
- Students applying for merit based scholarships (full-ride Washington and Alvey Scholarships, Presidential, Eagle, and Blue-Gray Awards)
- Home-schooled applicants
- Candidates applying from schools that provide written evaluations rather than grades

Admission to UMW remains a competitive process, and all candidates for admission will be considered on their own merits. Qualifying for application review without submitting standardized test scores does **not** guarantee admission to UMW. Students interested in pre-nursing can apply test optional, but may be required to provide SAT or ACT scores for admission to the Nursing Program.

If you have questions regarding the test optional policy, please contact Admissions at (540) 654-2000, 800-468-5614 or admit@umw.edu.





ADDENDUM

February 27, 2018

ADDENDUM NO. 1 TO ALL OFFERORS:

Reference – Request for Proposals: RFP 18-788 Call Center Services
Date Issued: February 12, 2018
For Delivery to: University of Mary Washington, Commonwealth of Virginia
***NEW* Proposal Due Date: Tuesday March 13, 2018 @ 2PM EST**

This addendum consists of six (6) pages.

***Due Date Change - EXTENDED:

The University will be closed on Friday March 9, 2018, so the due date is now changed to **Tuesday March 13, 2018 by 2pm EST.**

General Questions from Offerors:

- 1. Can companies from outside the USA, like from India or Canada, apply for this?**
Yes, companies from outside of the US may submit a proposal.
- 2. Would our firm need to come to UMW for meetings?**
The Contractor would not necessarily need to come to UMW's physical campus for meetings.
- 3. Can we perform the tasks of this RFP outside of the USA, like from India or Canada?**
Performing the tasks of this RFP outside of the US is not preferable concerning international call rates.
- 4. Can we submit proposals via email?**
No. Proposals must be submitted by mail or in person - UMW must have a physical copy of the proposal.
- 5. Does vendor have to reside in Virginia? If yes, do they need to be on university property?**
No, the vendor does not have to reside in Virginia.
- 6. Page 8 of the RFP refers to Required General Terms and Conditions of the Solicitation that are mandatory as part of the resulting contract. The link provided in the document appears to be broken. Can an updated link and/or the General Terms and Conditions be provided?**
<http://adminfinance.umw.edu/procurement/umw-policies-and-procedures-2/>. Here is the link where the University's General Terms and Conditions are located. If this link is unavailable for some reason due to any website issues, please go to adminfinance.umw.edu/procurement/ and then click on "Laws, Policies and Procedures" in the horizontal menu bar and scroll down to access the Terms under "Policies."
- 7. Given that there are only seven business days between the due date for questions and the last day vendors could ship a printed response to the University, would the University consider extending the deadline to give vendors adequate time to incorporate the University's answers into their bids?**
The University is extending the due date to March 13th at 2PM due to the fact that the University is closed on March 9, the previously stated due date. This should provide the vendor some extra time to prepare.

Statement of Needs Questions:

- 1. The RFP says the University would assist the vendor in selecting the individuals to be on team...that gets close to co-employment.**

Not sure if there is a question here - UMW would like to be able to help select the individuals from the contractor who would serve on the call team if possible to ensure a highly skilled team is selected. We will use the reference check to gauge the quality of call team (relative to overall satisfaction).

2. Support includes taking inbound calls and making outbound calls...correct?

The vendor selected will only assist with outbound calls (not inbound).

3. What is the average handle time (AHT) or average talk time?

It depends on the campaign. There is no average.

4. For outbound calls, what is the connect rate? For example, you give us 100 households to call...how many of those households do you reach the first time you call. How many attempts do you want vendor to make to connect to household?

This should be included in the vendor's proposal (proposal plan). See proposal section VII.B —See below:

The Offeror shall strive to meet the following goals:

1. *Initiate calls to students and/or parents with a minimum of 80% of the names provided by the University. Initiated calls are calls that may not be successful in reaching a student/parent.*
2. *Complete calls to students and/or parents with a minimum of 45% of the names provided by the University. Completed calls are calls that are initiated and reach a student/parent, resulting in a conversation.*
3. *Leave voicemail messages for a minimum of 35% of the names provided by the University.*

5. I assume calls are only made when school is open...correct? Holiday observed?

No - calls will not just be made when the University is open. For example, calls will occur when the University is closed end-December – January. Calls will also be made on weekends. Calls do not occur on religious holidays.

6. Is the recruitment campaign year round or only during Fall and Spring?

Campaigns are year round (to include summer).

7. Is there previous data regarding the average handling time for the campaign phone calls, including wrap-up time?

No.

8. Is there an existing CRM and database available for application integration?

We have an existing CRM. External data is imported; no direct integration.

9. Is your contractor, Hobson still part of the Campaign process? If so, what data/services do they provide?

Hobson's is not part of the Campaign process. External data is imported; no direct integration.

10. Would you consider new start-up companies for this proposal?

We will consider all proposals.

11. Will the University provide the appropriate call-script for the campaign and will agents utilize a decision tree created by the university? This is included in pricing as "administrative fees."

The University will provide the appropriate call-script for the campaign which will include a decision tree created by the University for agents to follow. *Note: the vendor may and is encouraged to include script development in their program proposal.*

12. Does the university have reporting templates that vendors will need to complete? Or will vendors be proposing their own reporting tools and templates?

No, the University does not have reporting templates the vendor will need to complete. Reporting should be included in the program plan and in the proposal.

13. **Student TeleAmbassadors made 3,000 calls. How many hours of work was this? Over what duration of time?**
The specific call hours weren't tracked. Calls were made from October 1 to May 1.
14. **How many names and numbers of students will the university provide to the vendor? Over what duration of time?**
The amount of names/numbers the University will provide to the vendor as well as the duration of time will vary by campaign.
15. **What is the Universities current average daily call volume?**
This data isn't currently collected.
16. **Can the University clarify exactly what it means by names given in the pricing sheet? And how does this relate to the "names given" by the university?**
"Names given" refers to the sheet of all available names of students that UMW would like for the contractor to contact.
17. **During the past year, what are the locations where work was performed?**
Fredericksburg campus (Fredericksburg, VA).
18. **Does the University have its own cell center facility?**
No.
19. **How many vendors are providing these services currently?**
None.
20. **What was the spend on Call Center/Tele-Recruiting Services during the past year?**
Under \$5,000.
21. **What is the period of time over which the calls will be made? Over what number of months? What time of year?**
Calling campaigns happen year round (January - December) and will occur throughout the length of the resulting contract.
22. **Are there inbound calling requirements?**
No inbound calling requirements - only outbound calls will be made.
23. **What will determine the extent of the campaign (i.e., the number of records to be called)?**
Calls are targeting to an "audience type" and there are no set number of records to be called.
24. **What is the call to action (i.e., what action are the callers asking the students/parents to take)?**
This will vary by campaign.
25. **Is it the desire of the University that the selected vendor will access UMW's CRM system Hobson to manage communication with prospective students?**
No - this is not included in the scope of services requested.
26. **Is it anticipated that the initial calling list will be 3,000 records?**
Not necessarily - it could be more or less than that amount depending on the campaign.
27. **How many records is the complete list of students who expressed interest in the University of Mary Washington?**

This varies by entry term. UMW receives approximately 7,000 applications a year from traditional first-year students. Students who “express interest” is typically triple that amount.

28. Are there restrictions on where the call center is located?

No.

29. The RFP notes that outbound calls are only made during the hours 5-8pm EST Monday through Friday, and 5-8pm EST Sunday. Are these hours tied to specific research indicating the best time to call, or is there another reason for these hours?

No, these hours are not tied to specific research indicating the best time to call. These are just our preferred times.

30. What is the current average hold time?

This data isn't currently collected.

31. What is the current abandonment rate and peak call volume?

This data isn't currently collected.

32. What are the peak call times?

This data isn't currently collected.

33. What are the historic volumes of outbound calls needed to be made by month?

This data is unknown.

34. How many FTEs are currently handling calls internally and through the vendor (externally)?

This data is unknown.

35. What is the current escalation rate for the past year for peak, non-peak, and overall?

This data isn't currently collected.

36. What is the desired escalation rate peak, non-peak, and overall?

This data isn't currently collected.

37. Will training material on specific admission requirements and processes for the University of Mary Washington be provided as training material to awarded vendor?

Yes.

38. Is the experienced project manager required to be dedicated exclusively to this project?

No.

39. The RFP states that the vendor must “provide an experienced Project Manager to work closely with UMW staff members in the Office of Enrollment Management.” Is the project manager required to be on-site in the Office of Enrollment Management, or may they be based in our call center?

The project manager is not required to be on-site and may be based in the vendor’s call center.

40. Are the customized call-scripts provided by UMW or do these have to be developed by the winning vendor?

Call scripts will be provided by UMW, however we encourage the vendor to make any suggestions they see necessary or provide samples of call scripts that have demonstrated positive results in the past.

41. How many times a year are telesearch services used by UMW?

No set number; this will vary year-to-year.

42. **For those students or parents who have expressed interest in UMW, have they given consent to be contacted via cell phone?**
Yes.
43. **The pricing sheet asks for pricing based on 5,000 names. Is that monthly, per quarter, or per year?**
No set timeframe.
44. **Will the awarded vendor have access and training on a UMW system to record notes on result of call effort? Or will the vendor need to provide a CRM system and give UMW access and training on system usage?**
Data will be imported to UMW's CRM. Systems will not be shared; no cross-training will be required.
45. **To assist in providing a competitive price: is UMW permitting their selected vendor to use predictive dialer technology (with consent and run in full compliance to laws and regulations) to increase the efficiency of outbound calling efforts?**
This may be included in the proposal. We will entertain proposals with and without the use of this technology.

Questions Related to SWAM:

1. **My business is a small certified business. Would you consider canceling the solicitation and resoliciting with an award of up to 20 pts for swam/small subcontracting plan instead of the 10 points listed in the evaluation criteria right now?**
While we are aware and understand that our institution's goal for swam spend is 42% and we strive to provide our business to small businesses, there are just not enough small businesses in the market that provide these services (preliminary search turned up 15 total vendors registered under the commodity code issued for the solicitation) and just not enough potential spend for this contract for us to consider canceling at this time and reissuing with a higher point value for small businesses.
2. **Would all SWAM certifications need to be completed at the time of proposal?**
Yes - to be awarded the full available 10 points for being a small business, you will need to have a small business certification completed by the time that the proposal is received.
3. **Are non-SWaM vendors required to subcontract with a SWaM vendor? Is there a required subcontracting percentage of contract revenue?**
No, no vendor is required to subcontract out any of the services required.
4. **Is an offeror who is not certified by the DSBSD as a small business, however is a certified Women Owned Business and Women Owned Small Business required to submit a small business subcontracting plan? Will proposals who do not submit a subcontracting plan be disqualified?**
The small business subcontracting plan table should be filled out only for those vendors who are planning to subcontract out part or all of the work. However, if the offeror is a registered DSBSD small business, we ask that you provide your certification number. Offerors who submit proposals without a small subcontracting plan will not be disqualified.
5. **Does the University expect a 42% small business participation for this contract? Or is there another target participation goal the University has set?**
The 42% Swam spend goal is set by the Governor of Virginia and strived for by the University to achieve that percentage of TOTAL spend with small business on an annual basis. This does not mean that we expect a 42% small business participation for this contract but that on a whole as a University this is our annual spend goal.
6. **Is qualifying small business participation limited to direct participation in the contract, or are second-tier services (such as office supply vendors, facility maintenance, etc.) qualified as well?**

Second-tier services qualify as long as you document on the small business subcontracting plan the amount or percentage of the work to be supplied by those businesses.

7. Can the University clarify its vision for how an out-of-state vendor, providing call center services located out of state, would involve an in-state business enterprise that has obtained its DSBSD certification?

Subcontracting to a Certified-Small Business is not required for this project. However, if you are interested in subcontracting out the work, please include any plans of doing such and the vendor you plan to use on the small business subcontracting plan form. The eVA VBO B2B site is a great way to connect with small businesses for subcontracting. But again, being a small business or subcontracting any portion of the work to a small business is NOT required.

8. What if a proposing vendor wishes to perform the entire contract without the use of a subcontractor? Are these vendors immediately at a disadvantage against other, in-state vendors that may subcontract out a portion of the work? Will simply completing and including the form entitle a vendor to the full 10 points?

If the vendor is not a certified small business or does not plan to subcontract out any of the work to a small business, that vendor would simply not receive any portion of the 10 points available in the small subcontracting criteria. This point value was given to be large enough to award small businesses a small advantage to compete as the University's goal is to award 42% of its spend to small businesses, but not large enough to greatly sway the outcome of the evaluation so that more emphasis is placed on the vendor's ability to provide the solution that would best fit the agency's needs.

END OF ADDENDUM NO. 1

Michelle Pickham
Contract Officer
Procurement Services
University of Mary Washington
Phone: (540)654-2260

RFP 18-788 Addendum No. 1 (and all addenda) should be acknowledged and included in the RFP submittal package.

NAME OF OFFERING FIRM: _____

NAME OF OFFEROR REPRESENTATIVE: _____

OFFEROR SIGNATURE: _____

DATE: _____



SEALED REQUEST FOR PROPOSAL (RFP)

ISSUE DATE: February 12, 2018
RFP NUMBER & TITLE: RFP 18-788 Call Center/Tele-Recruiting Services
PROPOSAL DUE DATE & TIME: March 9, 2018 @ 2PM EST
NOTE: Proposals received after the due date and time cannot be accepted.
PROPOSAL DELIVERY ADDRESS: University of Mary Washington
WORK LOCATION: Fredericksburg, VA
COMMODITY CODE(S): 91520
PRE-PROPOSAL CONFERENCE: [] Optional [] Mandatory [X] N/A
CONTRACT OFFICER: Michelle Pickham EMAIL: mmiller8@umw.edu
PERIOD OF CONTRACT: Date of Award through 3 years, with 3 one-year renewals or as negotiated.

In compliance with this Sealed Request for Proposal (RFP) and to all the conditions imposed therein, the undersigned offers and agrees to furnish the goods/services described at the prices indicated in their proposal or as mutually agreed upon by subsequent negotiation.

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.

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: _____

SEALED REQUEST FOR PROPOSALS (RFP)

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 **Tuesday February 27, 2018 by 2PM EST.**

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 either 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.

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.

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.

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.

TENTATIVE TIMELINE:

| | |
|--------------------------------------|-----------------------------|
| Solicitation Issued: | February 12, 2018 |
| No Vendor Questions Permitted After: | February 27, 2018 @ 2pm EST |
| Proposals Due: | March 9, 2018 @ 2PM EST |
| Initial Evaluations: | March 12-16, 2018 |
| Presentations: | March 19-30, 2018 |
| Negotiations: | April 1-13, 2018 |
| Award of Contract: | May 1, 2018 |

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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 qualified contractor to provide Call Center/Tele-search Services to interested and prospective students and parents 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:** The Admissions TeleAmbassador Program was launched successfully in September 2014. This Call Center replaced UMW's contract with Ruffalo-Cody for tele qualifying service. The original eight TeleAmbassadors completed the first call campaign, outreach for the September Open House. In the Fall of 2014, calling metrics exceeded the previous service by 9% by making 1423 calls. Student TeleAmbassadors have routinely hit their calling targets and have been a great supplement to other text and email communications. Since that time, UMW has continued to use an internal student call team and have outsourced calls on two occasions in Summer 2016 and Fall 2017. Student TeleAmbassadors make approximately 3,000 calls each school year. UMW's Customer Relationship Manager "CRM" system, Hobson's, manages all communication which includes tele-counseling. UMW is looking to replace the internal student call team with a vendor-provided team for this service for our tele-recruiting and call center needs as the internal student call team is not available at all times throughout the year.

- 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. The Contractor shall notify UMW in writing of any such entities accessing the contract. The Contractor shall provide semi-annual usage reports for all entities accessing the contract. 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. Proposal Requirements - The University reserves the right to:
 - accept or reject any and all proposals, in whole or in part, received as a result of this RFP,
 - waive minor informalities,
 - issue a lowered evaluation of the proposal for failure to submit all information requested,
 - negotiate with any or all responsible vendors in any manner necessary to serve the best interests of the University, or
 - accept the best proposal as submitted, without negotiation, and may do so; therefore, vendors should present their best proposal and not rely on having a future opportunity to negotiate and adjust their originally submitted proposal.

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

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

If the Offeror intends to protect any Trade Secrets or Proprietary Information, they must:

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

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

3. **Oral Presentations:** Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to the University. This will provide an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. *Oral presentations are an option of the university and may not be conducted. Therefore, proposals submitted in response to this RFP should not be submitted with the presumption that there will be opportunities to revise that proposal after submission.*
4. **Number of Proposals Required:** One printed (1) 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 and clearly marked redacted copy must be submitted if required of 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 so that the Proposal Evaluation Team can properly evaluate the Offeror's ability to provide the required services. Offerors are required to submit the following items within the proposal:

1. Complete and return SIGNED RFP cover page. Proposals shall be signed by an authorized representative of the Offeror.
2. Provide a brief description and history of the firm, including information detailing experiences and qualifications of the firm to provide this solution, such as number of years in business providing similar solutions to similar entities, preferably in higher education. Also include information detailing the success rates of past projects with other clients to meet their goals.
3. Submit resumes of the proposed Call Team staff including the person who will be designated as the Project Manager.
4. Submit a complete response to the RFP, in detail, to include the following:
 - a. Offeror's ability to meet EACH requirement within Section VII.
5. Complete and return Pricing Sheet Attachment A.
6. Complete and return References Attachment B.
7. Complete and return the Small Business Subcontracting Plan Attachment C.
8. Submit any exceptions the Offering firm takes to the Terms and Conditions as stated in this RFP.
9. 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: UMW seeks a qualified Contractor to provide tele-search services to interested and prospective students and parents as part of the University’s student recruitment initiatives.

A. General Requirements - the Offeror shall:

1. Provide personalized tele-search activity with execution of phone calls in the evenings Monday through Friday from 5:00pm-8:00pm EST and Sundays 5:00pm-8:00pm EST.
2. Provide a highly skilled team of communication professionals with knowledge of admissions requirements and processes.
3. Provide an experienced Project Manager to work closely with UMW staff members in the Office of Enrollment Management.
4. Use a customized call-script designed to address the University’s specific objectives.
5. Provide a detailed reporting following each call campaign to include both quantitative and qualitative data (examples of report data can include: students admitted who didn’t enroll, ages 18yr-45yr, male and female students, etc.)

B. The Offeror shall strive to meet the following goals:

1. Initiate calls to students and/or parents with a minimum of 80% of the names provided by the University. Initiated calls are calls that may not be successful in reaching a student/parent.
2. Complete calls to students and/or parents with a minimum of 45% of the names provided by the University. Completed calls are calls that are initiated and reach a student/parent, resulting in a conversation.
3. Leave voicemail messages for a minimum of 35% of the names provided by the University.

C. The University will:

1. Provide a list of names and numbers of students who have expressed interest in the University of Mary Washington.
2. Assist in selecting the team of communication professionals for the tele-search tasks based on their individual qualifications, experience, and demonstrated skills.

VIII. CONTRACT ADMINISTRATION:

- A. The Director of Undergraduate Admissions 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

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

| Criteria | Point Value |
|--|-------------|
| Offeror’s Capability: Experience and Qualifications of Offeror & Proposed Call Staff. Preferably with Higher Education Institutions. | 30 |

| | |
|---|-----|
| References & Success Rates: current and past client history and success/failure rates with service provided | 25 |
| Plan & Methodology: Quality of Offeror's plan and approach to meet UMW tele-search goals | 20 |
| Pricing - Total Cost for Services | 15 |
| 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 proposal in response to this solicitation shall be valid for ninety (90) days. At the end of the ninety (90) days the proposal may be withdrawn at the written request of the offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is canceled.
2. AWARD: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The University may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. (*Governing Rules* § 49D) Should the University determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.
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. FORMAL SOLICITATION COMMUNICATIONS/DISQUALIFICATION OF OFFERORS:
 Informal Communications - From the date of receipt of this RFP by each Offeror until a binding contractual agreement exists with the selected contractor and all other Offerors have been notified, or when the

University rejects all proposals, informal communication regarding this procurement shall cease. Informal communication shall include, but not be limited to:

- a. Requests from Offerors to any departments of the University, with the exception of Procurement Services, for information, comments, etc.
- b. Requests from any department at the University of any employee of the Offeror, with the exception of Procurement Services, for information, comments, etc.
- c. Contact with any individuals participating on the selection committee.

Formal Communications - From the date of receipt of this RFP by each Offeror, until a binding contractual agreement exists with the selected Offeror, and all other Offerors have been notified, or when the University rejects all proposals, all communications between the University and the Offerors will be formal as provided for in this RFP or as requested by Procurement Services. Formal communication shall include, but not be limited to:

- a. Pre-proposal conference
- b. Oral presentation, if requested
- c. Site visits, etc.

ANY FAILURE TO ADHERE TO PROVISIONS SET FORTH ABOVE MAY RESULT IN THE REJECTION OF ANY OFFERORS PROPOSAL AND/OR CANCELLATION OF THIS REQUEST FOR PROPOSAL.

5. **IDENTIFICATION OF PROPOSAL ENVELOPE:** The signed proposal should be returned in a separate envelope or package, sealed and identified as follows (on the outside of the package). The envelope or package should be addressed as directed on Page 1 of the solicitation. If a proposal is mailed, the offeror takes the risk that the envelope, even if marked as described above, may be inadvertently opened and the information compromised which may cause the proposal to be disqualified. Proposals may be hand delivered to the designated location in the office issuing the solicitation. No other correspondence or 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 |

6. **LATE PROPOSALS:** To be considered for selection, proposals must be received in the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically disqualified and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intradepartmental University mail system. It is the sole responsibility of the Offeror to insure that its proposal reaches the issuing office by the designated date and hour.

B. CONTRACT:

1. **ADDITIONAL 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. ADVERTISING TO THE GENERAL PUBLIC: In the event a contract is awarded for services resulting from this solicitation, no indication of such services to the University of Mary Washington will be used in product literature or advertising. The contractor shall not state in any of its advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
3. APPLICABLE LAWS AND COURTS: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The agency and the contractor are encouraged to resolve any issues in controversy arising from the award of the contract or any contractual dispute using Alternative Dispute Resolution (ADR) procedures (Code of Virginia, § 2.2-4366). ADR procedures are described in Chapter 9 of the Vendors Manual. The contractor shall comply with all applicable federal, state and local laws, rules and regulations.
4. AUDIT: The Contractor hereby agrees to 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 Agency, its authorized agents, and/or State auditors shall have full access to, and the right to examine any of said materials during said period.
5. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
6. 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.
7. 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.

8. CONTINUITY OF SERVICES: The Contractor recognizes that the services under this contract are vital to the Agency and must be continued without interruption and that, upon contract expiration, a successor, either the Agency or another contractor, may continue them.
 - a. The Contractor agrees:
 - i. To exercise its best efforts and cooperation to effect an orderly and efficient transition to a successor;
 - ii. To make all Agency owned facilities, equipment, and data available to any successor at an appropriate time prior to the expiration of the contract to facilitate transition to successor; and
 - iii. That the Agency Contracting Officer shall have final authority to resolve disputes related to the transition of the contract from the Contractor to its successor.
 - b. The Contractor shall, upon written notice from the Contract Officer, furnish phase-in/phase-out services for up to ninety (90) days after this contract expires and shall negotiate in good faith a plan with the successor to execute the phase-in/phase-out services. This plan shall be subject to the Contract Officer's approval.
 - c. The Contractor shall be reimbursed for all reasonable, pre-approved phase-in/phase-out costs (i.e., costs incurred within the agreed period after contract expiration that result from phase-in, phase-out operations) and a fee (profit) not to exceed a pro rata portion of the fee (profit) under this contract. All phase-in/phase-out work fees must be approved by the Contract Officer in writing prior to commencement of said work.
9. E-VERIFY PROGRAM: EFFECTIVE 12/1/13: Pursuant to 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.
10. EXTRA CHARGES PROHIBITED: The bid or proposal price shall be complete; and shall include all applicable license fees and any other charges; extra charges invoked by the contractor shall not be honored or paid unless agreed upon in writing. 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.
11. INDEPENDENT CONTRACTOR RELATIONSHIP: In performing any and all of the services to be provided under this contract, the Contractor shall at all times and for all purposes be and remain an independent contractor. In no case and under no circumstances shall the Contractor or any of its employees, including but not limited to those of its employees actually performing any of the services, have authority to make

any representations or commitments on behalf of the University or be considered the agent of the University for any purpose whatsoever. No persons engaged by the Contractor in connection with the provision of Services shall be considered employees of the University. As between the parties, the Contractor shall be responsible for hiring, supervising, training and instructing those individuals performing the services and shall pay any required state and federal taxes on behalf of such persons and provide them with any legally required employee benefits.

12. NOTICES: Any notice, demand, request, consent, approval or communication required by this Agreement to be given in writing shall be sent by certified mail, return receipt requested, and shall be deemed to be given received within five (5) days after delivery to the U.S. Postal Service (stamped evidence of delivery) when received and shall be addressed to the University or Merchant at their respective addresses.
13. OFFEROR'S REPRESENTATION: 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.
14. ORDER OF PRECEDENCE: Any relationship as a result of this RFP will be governed by a Contract that the Offeror must execute with the University. If it is determined by the University that any part of this RFP is in conflict between the terms and conditions of the Contract, the terms of the Contract shall prevail. Offerors should review the Contract (which will include General and Special terms and conditions detailed in this document) and if there are any proposed changes, submit a Word format redline markup as part of the RFP response.
15. 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.
16. RENEWAL OF CONTRACT: This contract may be renewed by the University upon written agreement of both parties for three (3) 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.
17. 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.
18. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:
 - a. It is the goal of the Commonwealth that 42% of its purchases be 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 Small Business and Supplier Diversity (DSBSD) by the due date for receipt of bids or proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the Procurement office at a minimum the following information: name of small business with the DSBSD certification number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided.

- b. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution on a monthly basis, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the Procurement office at a minimum the following information:
 - 1. Name of firm with the DSBSD certification number
 - 2. Phone number
 - 3. Total dollar amount subcontracted
 - 4. Category type (small, women-owned, or minority-owned)
 - 5. Type of product or service providedPayment(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 monthly basis, information on use of subcontractors that are not DSBSD-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the Procurement office at a minimum the following information: name of firm, phone number, total dollar amount subcontracted, and type of product or service provided.

19. **SUBCONTRACTS:** No portion of the work shall be subcontracted without prior written consent of the University. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the 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 the Virginia Prompt Payment Act. Ref.: Code of Virginia, Sections 11-62.1 through 11-62.9; "Prompt Payment Act" memorandum issued by the Office of the Comptroller, June 27, 1984.

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

Fill in and submit the following pricing table. If the Offeror’s pricing structure differs from the above table, please include a copy of the alternate structure with detailed descriptions of the fees involved, but the table below must still be filled out for evaluation purposes. Evaluation will be based upon the equation below.

| Description | Cost |
|--|------|
| Cost per Name (0-2,500 names given) | |
| Cost per Name (2,501-5,000 names given) | |
| Cost per Name (5,001-7,500 names given) | |
| Cost per Name (7,501-10,000 names given) | |
| Reporting Fees: Quantitative & Qualitative Data Report | |
| Administrative Fees: Script creation, caller training, etc. Please provide details! | |

Cost evaluation will be based on 5,000 names given for calling, with reporting and administration fee totals:

Cost of Names (5,000) _____ + Reporting Fees _____ + Administrative Fees _____ = Evaluation Total

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 | |
| Solution Provided | |

| Reference #2 | |
|-------------------|--|
| Agency Name | |
| Contact Name | |
| Email | |
| Phone # | |
| # Years w/ Agency | |
| Solution Provided | |

| Reference #3 | |
|-------------------|--|
| Agency Name | |
| Contact Name | |
| Email | |
| Phone # | |
| # Years w/ Agency | |
| Solution 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 One: 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/>

UNIVERSITY OF MARY WASHINGTON

Students | Faculty & Staff | Alumni | Give | [Search Bar] GO

Administration and Finance

Procurement Services

Laws, Policies and Procedures | Buyer Resources | SPCC | Technology Purchases | **Vendors** | UMW Supplier Expo

- Forms
- DSBSD - SWaM
- Contracts
- Contact Us

QUICK LINKS

- Vendor Resources
- Vendor Policies and Guidelines
- Current Bids & Proposals
- SWaM and Non-SWaM Reporting**
- Vendor Feedback

SWaM Subcontractor Reporting

This form should be used by vendors to report their Small, Woman-owned and Minority-owned (SWaM) business spend.

Vendor *

Please enter the name of the COMPANY

Contract Number

Please enter the CONTRACT NUMBER

Name *

First

Last

Please enter the SUBMITTER'S first and last name

Email *

Please enter the SUBMITTER'S email address

Select Reporting Method *

- Upload Spreadsheet/Document
- Manual Input

Upload Document - Excel or Word only

Manually type information for each sub-contractor

ATTACHMENT E - SWAM INITIATIVE LETTER



TO: University of Mary Washington Supplier Community
FROM: Lynne Richardson *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 18-788 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 **February 27, 2018 by 2PM 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: **March 9, 2018 @ 2PM 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.
- Description of the Offering firm's history and expertise.
- Resumes of proposed Call Team and Project Manager
- 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.