COMMONWEALTH OF VIRGINIA

STANDARD CONTRACT

Contract Number: VTS-2051-2024

This contract entered into this 17th day of July 2023 by Ben Allegretti Consulting, Inc hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Polytechnic Institute and State University called "Virginia Tech."

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

SCOPE OF CONTRACT: The Contractor shall provide Organizational Consulting Services to Virginia Tech as set forth in the Contract Documents.

PERIOD OF CONTRACT: From January 1, 2024 through December 31, 2025 with options for three (3) two (2) year renewals.

COMPENSATION AND METHOD OF PAYMENT: The Contractor shall be paid by Virginia Tech in accordance with the Contract Documents

CONTRACT DOCUMENTS: The Contract Documents shall consist of this signed contract, Request for Proposal (RFP) number 5671412306 dated March 16, 2023, together with Addendum Number 1 To RFP dated March 30, 2023, Addendum Number 2 To RFP dated April 14, 2023, the proposal submitted by the Contractor dated April 26, 2023 and the negotiation summary, all of which Contract Documents are incorporated herein.

ELECTRONIC TRANSACTIONS: If this paragraph is initialed by both parties, to the fullest extent permitted by Code of Virginia, Title 59.1, Chapter 42.1, the parties do hereby expressly authorize and consent to the use of electronic signatures as an additional method of signing and/or initialing this contract and agree electronic signatures (for example, the delivery of a PDF copy of the signature of either party via facsimile or electronic mail or signing electronically by utilizing an electronic signature service) are the same as manual executed handwritten signatures for the purposes of validity, enforceability and

(Initials)

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

Contr
By: _____
(Signature)
Ben Allegretti
President
Name and Title

Virgini
By: _____

Reed Nagel
Assistant Director of Procurement

Request for Proposal 5671412306

For

Organizational Consulting Services

March 16, 2023

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

RFP # 5671412306, Organizational Consulting Services

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until April 20, 2023 at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Angela Caldwell, Phone: (540) 231-1269 e-mail: acaldwell@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by 2:00PM on March 31, 2023. Inquiries must be submitted to the procurement officer identified in this solicitation.

PROPOSAL SUBMISSION:
Proposals may NOT be hand delivered to the Procurement Office.

Virginia Tech has partnered with Bonfire Interactive to create a new procurement portal that will allow you to access business opportunities and submit bids and proposals to Virginia Tech digitally.

Proposals must be submitted electronically at:
https://procurement-vt.bonfirehub.com/.

Vendors are requested to visit the new Procurement Portal then follow the link to the Bonfire vendor registration page to register your company. Registration is easy and free. If you have any challenges with the registration process, please contact Bonfire Interactive Support at support@gobonfire.com .

It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions. Log into your Bonfire Vendor account in order to access the opportunity and begin preparing your submission. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

For a quick tutorial on how to upload a submittal, visit: https://support.gobonfire.com/hc/en-us/articles/360011034814-Creating-and-Uploading-a-Submission-for-Vendors-?_ga=2.42375717.1472165071.1588110542-997330893.1585332052

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 1000MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE: _____ Date: _____

06/27/2022

[INCLUDE THIS PAGE]

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I.   <u>PURPOSE</u>:

This Request for Proposal (RFP) seeks to solicit proposals to establish a contract through competitive negotiations for Consulting Services with a specialty for Organizational Structure in Higher Education, by Virginia Polytechnic Institute and State University (Virginia Tech), an agency of the Commonwealth of Virginia.

Transformational change and organizational and operational excellence are paramount to the university's long-term success. As the university continues to move the Beyond Boundaries foundation from visioning into planning and implementation, and refreshes the strategic plan over the next year, the need for experienced firm(s) to provide a broad range of strategic consulting services remains. Through a past organizational consulting services opportunity, the university contracted with firms with a variety of expertise that enabled the university to progress strategic interests and investments.

Firms do not need to possess experience in all categories to respond but should provide an overview of capabilities in the response.

Specific project requirements will be provided by the requesting department at the time services are needed. Requests will vary based on specific department needs.

II.   <u>SMALL, WOMAN-OWNED AND MINORITY (SWAM) BUSINESS PARTICIPATION</u>:

The mission of the Virginia Tech supplier opportunity program is to foster inclusion in the university supply chain and accelerate economic growth in our local communities through the engagement and empowerment of high quality and cost competitive small, minority-owned, women-owned, and local suppliers. Virginia Tech encourages prime suppliers, contractors, and service providers to facilitate the participation of small businesses, and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other inclusive and innovative relationships.

For more information, please visit: https://www.sbsd.virginia.gov/

III.   <u>CONTRACT PERIOD</u>:

The term of this contract is for two years, or as negotiated. There will be an option for three (3) two-year renewals, or as negotiated.

IV.   <u>EVA BUSINESS-TO-GOVERNMENT ELECTRONIC PROCUREMENT SYSTEM</u>:

The eVA Internet electronic procurement solution streamlines and automates government purchasing activities within the Commonwealth of Virginia. Virginia Tech, and other state agencies and institutions, have been directed by the Governor to maximize the use of this system in the procurement of goods and services. *We are, therefore, requesting that your firm register as a vendor within the eVA system.*

There are transaction fees involved with the use of eVA. These fees must be considered in the provision of quotes, bids and price proposals offered to Virginia Tech. Failure to register within the eVA system may result in the quote, bid or proposal from your firm being rejected and the award made to another vendor who is registered in the eVA system.

Registration in the eVA system is accomplished on-line. Your firm must provide the necessary information. Please visit the eVA website portal at http://www.eva.virginia.gov/pages/eva-registration-buyer-vendor.htm and **register both with eVA and Ariba**. *This process needs to be completed before Virginia Tech can issue your firm a Purchase Order or contract.* If your firm

conducts business from multiple geographic locations, please register these locations in your initial registration.

For registration and technical assistance, reference the eVA website at: https://eva.virginia.gov/, or call 866-289-7367 or 804-371-2525.

V.   <u>CONTRACT PARTICIPATION</u>:

It is the intent of this solicitation and resulting contract to allow for cooperative procurement. Accordingly, any public body, public or private health or educational institutions, or Virginia Tech's affiliated corporations and/or partnerships may access any resulting contract if authorized by the contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor, the resultant contract may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. The Contractor shall notify Virginia Tech in writing of any such entities accessing the contract, if requested. No modification of this contract or execution of a separate contract is required to participate. The Contractor will provide semi-annual usage reports for all entities accessing the Contract, as requested. Participating entities shall place their own orders directly with the Contractor and shall fully and independently administer their use of the contract to include contractual disputes, invoicing and payments without direct administration from Virginia Tech. Virginia Tech 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 Virginia Tech 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 does not preclude any participating entity from using other contracts or competitive processes as the need may be.

VI.   <u>STATEMENT OF NEEDS/SCOPE OF WORK</u>:

A. To support the transformation and organizational change initiatives, the university seeks experienced firm(s) to provide a broad range of strategic consulting services. These services include, but are not limited to, organizational design and culture, business process evaluation and design (including but not limited to human resources, financial affairs, administrative operations, and academic enterprise management), change management, business analytics, process improvement, project development and management, strategic advisory services, and executive coaching.

B. Strategic consulting service projects may be short or long term in nature, to be determined by the scope of work and project owner.

C. It is desirable, but not required, that the strategic consulting service vendor(s) have experience in higher education and/or the public sector.

D. Any services under the resulting contract shall be documented in a Statement of Work established between the Requestor and the Vendor when services are required.

E. The awarded firm(s) may be required to attend meetings on campus or in other Virginia Tech locations throughout the Commonwealth of Virginia.

F. If travel is required by the awarded firm(s), any requests for reimbursement shall be at the established GSA Travel rates for the appropriate location.

VII. <u>PROPOSAL PREPARATION AND SUBMISSION</u>:

A. <u>Specific Requirements</u>

Proposals should be as thorough and detailed as possible so that Virginia Tech may properly evaluate your capabilities to provide the required goods or services. Offerors are required to submit the following information/items as a complete proposal:

1. Vendor Profile Information
Vendor must provide the legal business name, legal status (e.g., corporation, sole proprietor, etc.) and the year the entity was organized to do business as the entity now substantially exists, the home office address, and telephone and fax numbers, web site URL (if any), and organizational chart, including the names and titles of Vendor's principal officers.

2. Vendor Organizational Capabilities
Vendor must provide a brief description of its entity (including business locations, size, areas of specialization and expertise, client base and any other pertinent information that would aid an evaluator in formulating a determination about the stability and strength of the entity), including the Vendor organization's experience and history with consulting related to development of the requirements within this proposal request. Vendor must provide curriculum vitae, resume or capabilities statement for all personnel that may be assigned to the university; this should include relevant experience and certifications.

3. Vendor Account Manager
Vendor shall appoint an Account Manager who will provide oversight of Vendor contract activities. Vendor's Account Manager will be the principal point of contact concerning Vendor's performance under this Contract. Vendor shall notify the Contract Administrator, in writing, when there is a new Vendor Account Manager assigned to this Contract. Vendors must state whether or not Subcontractors are being used and list them if so. Virginia Tech reserves the right to reject any and all Subcontractors that Vendor proposes. Any Subcontractors engaged after award of the Contract must be pre-approved in writing by Virginia Tech.

4. Client References
Vendors shall provide as references the names, addresses, telephone numbers, email addresses, and contact person for at least (3) representative customers, preferably within higher education. References must be for projects that are of a similar size and scope of the project anticipated in this RFP. References must not be from a person, company, or organization with any special interest, financial or otherwise, in the Vendor.

5. Cost Proposal
Vendor will submit cost proposal that outlines job titles and corresponding rates. Provide an overview of the methodology of providing consulting services and identify all costs

associated, broken down by activity, with providing services.

6. Demonstrate capacity and readiness to perform service and deliverables as described.

7. Participation of Small, Women-owned and Minority-owned Business (SWAM) Business: If your business cannot be classified as SWaM, describe your plan for utilizing SWaM subcontractors if awarded a contract. Describe your ability to provide reporting on SWaM subcontracting spend when requested. If your firm or any business that you plan to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award. If your firm is currently certified, you agree to maintain your certification for the life of the contract. For assistance with SWaM certification, visit the SBSD website at http://www.sbsd.virginia.gov/

8. The return of the General Information Form and addenda, if any, signed and filled out as required.

B. General Requirements

1. RFP Response: In order to be considered for selection, Offerors shall submit a complete response to this RFP to include;

    i. **One (1) electronic document** in WORD format or searchable PDF of the entire proposal as one document, INCLUDING ALL ATTACHMENTS must be uploaded through the Bonfire online submission portal. Refer to page 2 for instructions.

        Any proprietary information should be clearly marked in accordance with 2.d. below.

    ii. Should the proposal contain **proprietary information**, provide **one (1) redacted electronic copy** of the proposal and attachments **with proprietary portions removed or blacked out**. This redacted copy should follow the same upload procedures as described on Page 1 of this RFP. This redacted copy should be clearly marked *"Redacted Copy"* within the name of the document. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable. Virginia Tech shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

        No other distribution of the proposals shall be made by the Offeror.

2. Proposal Preparation:

    a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in Virginia Tech requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by Virginia Tech at its discretion. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

b. Proposals should be prepared simply and economically providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.

c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, subletter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and subletter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at an appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.

d. Ownership of all data, material and documentation originated and prepared for Virginia Tech pursuant to the RFP shall belong exclusively to Virginia Tech and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act. However, to prevent disclosure the Offeror must invoke the protections of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other materials is submitted. The written request must specifically identify the data or other materials to be protected and state the reasons why protection is necessary. –The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line item prices and/or total proposal prices as proprietary or trade secrets is not acceptable and may result in rejection of the proposal.

3. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to Virginia Tech.—This will provide an opportunity for the Offeror to clarify or elaborate on the proposal but will in no way change the original proposal. Virginia Tech will schedule the time and location of these presentations. Oral presentations are an option of Virginia Tech and may not be conducted. Therefore, proposals should be complete.

VIII. SELECTION CRITERIA AND AWARD:

A. Selection Criteria

Proposals will be evaluated by Virginia Tech using the following:

Criteria	Maximum Point Value
1. Quality of products/services offered and suitability for the intended purposes	25
2. Qualifications and experiences of Offeror in providing the goods/services	30

3. Specific plans or methodology to be used to provide the Services	10
4. Cost (or Price)	25
5. Participation of Small, Women-Owned and Minority (SWAM) Business	10
Total	100

B. 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 Proposal, including price, if so stated in the Request for Proposal. Negotiations shall then 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, Virginia Tech shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. Virginia Tech may cancel this Request for Proposal or reject proposals at any time prior to an award. Should Virginia Tech determine in writing and in its sole discretion that only one offeror has made the best proposal, 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 this solicitation and the Contractor's proposal as negotiated.

Virginia Tech reserves the right to award multiple contracts as a result of this solicitation.

IX.   INVOICES:

Invoices for goods or services provided under any contract resulting from this solicitation shall be submitted by email to vtinvoices@vt.edu or by mail to:

Virginia Polytechnic Institute and State University (Virginia Tech)
Accounts Payable
North End Center, Suite 3300
300 Turner Street NW
Blacksburg, Virginia 24061

X.   METHOD OF PAYMENT:

Virginia Tech will authorize payment to the contractor as negotiated in any resulting contract from the aforementioned Request for Proposal.

Payment can be expedited through the use of the Wells One AP Control Payment System. Virginia Tech strongly encourages participation in this program. For more information on this program please refer to Virginia Tech's Procurement website: http://www.procurement.vt.edu/vendor/wellsone.html or contact the procurement officer identified in the RFP.

XI.   ADDENDUM:

Any **ADDENDUM** issued for this solicitation may be accessed at http://www.apps.vpfin.vt.edu/html.docs/bids.php. Since a paper copy of the addendum will not be mailed to you, we encourage you to check the web site regularly.

XII.   COMMUNICATIONS:

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Communications regarding this solicitation shall be formal from the date of issue, until either a Contractor has been selected or the Procurement Department rejects all proposals. Formal communications will be directed to the procurement officer listed on this solicitation. Informal communications, including but not limited to request for information, comments or speculations regarding this solicitation to any University employee other than a Procurement Department representative may result in the offending Offeror's proposal being rejected.

XIII. <u>CONTROLLING VERSION OF SOLICITATION</u>:

The posted version of the solicitation and any addenda issued by Virginia Tech Procurement Services is the mandatory controlling version of the document. Any modification of/or additions to the solicitation by the Offeror shall not modify the official version of the solicitation issued by Virginia Tech Procurement Services. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, Virginia Tech reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.

XIV. <u>TERMS AND CONDITIONS</u>:

This solicitation and any resulting contract/purchase order shall be governed by the attached terms and conditions, see Attachment A.

XV. <u>CONTRACT ADMINISTRATION</u>:

A. Pascha Gerni, Managing Director, Business and Administration, Office of the President, at Virginia Tech or their designee, shall be identified as the Contract Administrator and shall use all powers under the contract to enforce its faithful performance.

B. The Contract Administrator, or their designee, 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, or their designee, shall not have authority to approve changes in the services which alter the concept or which call for an extension of time for this contract. Any modifications made must be authorized by the Virginia Tech Procurement Department through a written amendment to the contract.

XVI. <u>ATTACHMENTS</u>:

Attachment A - Terms and Conditions

ATTACHMENT A

TERMS AND CONDITIONS

RFP GENERAL TERMS AND CONDITIONS

See:
https://www.procurement.vt.edu/content/dam/procurement_vt_edu/docs/terms/GTC_RFP_02182022.pdf

ADDITIONAL TERMS AND CONDITIONS

1. **ADDITIONAL GOODS AND SERVICES**: The University may acquire other goods or services that the supplier provides other than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services newly introduced during the term of the Agreement.

2. **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. Virginia Tech, its authorized agents, and/or the State auditors shall have full access and the right to examine any of said materials during said period.

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

4. **CANCELLATION OF CONTRACT**: Virginia Tech reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the Contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the Contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.

5. **CONTRACT DOCUMENTS**: The contract entered into by the parties shall consist of the Request for Proposal including all modifications thereof, the proposal submitted by the Contractor, the written results of negotiations, the Commonwealth Standard Contract Form, all of which shall be referred to collectively as the Contract Documents.

6. **IDENTIFICATION OF PROPOSAL EMAIL**: Virginia Tech will only be accepting electronic submission of proposals. All submissions must be submitted to https://procurement-vt.bonfirehub.com/. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time. **Attachments must be smaller than 1000MB in order to be received by the University.** Proposals may **NOT** be hand delivered to the Procurement Office.

7. **NOTICES**: Any notices to be given by either party to the other pursuant to any contract resulting from this solicitation shall be in writing via email.

8. **SEVERAL LIABILITY:** Virginia Tech will be severally liable to the extent of its purchases made against any contract resulting from this solicitation. Applicable entities described herein will be severally liable to the extent of their purchases made against any contract resulting from this solicitation.

9. **CLOUD OR WEB HOSTED SOFTWARE SOLUTIONS**: For agreements involving Cloud-based Web-hosted software/applications refer to link for additional terms and conditions: http://www.ita.vt.edu/purchasing/VT_Cloud_Data_Protection_Addendum_final03102017.pdf

10. **ADVERTISING**: In the event a contract is awarded for supplies, equipment, or services resulting from this solicitation, no indication of such sales or services to Virginia Tech will be used in product literature or advertising. The contractor shall not state in any of the 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.

11. **CRIMINAL CONVICTION CHECKS:** All criminal conviction checks must be concluded prior to the Contractor's employees gaining access to the Virginia Tech Campus. Employees who have separated employment from Contractor shall undergo another background check prior to re-gaining access to the Virginia Tech campus. Contractor shall ensure subcontractors conduct similar background checks. Virginia Tech reserves the right to audit a contractor's background check process at any time. All employees have a duty to self-disclose any criminal conviction(s) occurring while assigned to the Virginia Tech campus. Such disclosure shall be made to Contractor, which in turn shall notify the designated Virginia Tech contract administrator within 5 days. If at any time during the term of the contract Virginia Tech discovers an employee has a conviction which raises concerns about university buildings, property, systems, or security, the contractor shall remove that employee's access to the Virginia Tech campus, unless Virginia Tech consents to such access in writing. Failure to comply with the terms of this provision may result in the termination of the contract.

12. **INSURANCE:** By signing and submitting a Proposal/Bid under this solicitation, the offeror/bidder certifies that if awarded the contract, it will have the following insurance coverages at the time the work commences. Additionally, it will maintain these during the entire term of the contract and that all insurance coverages will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.
During the period of the contract, Virginia Tech reserves the right to require the contractor to furnish certificates of insurance for the coverage required.
INSURANCE COVERAGES AND LIMITS REQUIRED:
A. Worker's Compensation - Statutory requirements and benefits.
B. Employers Liability - $100,000.00
C. General Liability - $2,000,000.00 combined single limit. Virginia Tech and the Commonwealth of Virginia shall be named as an additional insured with respect to goods/services being procured. This coverage is to include Premises/Operations Liability, Products and Completed Operations Coverage, Independent Contractor's Liability, Owner's and Contractor's Protective Liability and Personal Injury Liability.
D. Automobile Liability - $500,000.00
E. Builders Risk – For all renovation and new construction projects under $100,000 Virginia Tech will provide All Risk – Builders Risk Insurance. For all renovation contracts, and new construction from $100,000 up to $500,000 the contractor will be required to provide All Risk – Builders Risk Insurance in the amount of the contract and name Virginia Tech as additional insured. All insurance verifications of insurance will be through a valid insurance certificate.
F. The contractor agrees to be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from the payment of all sums of money by reason of any claim against them arising out of any and all occurrences resulting in bodily or mental injury or property damage that may happen to occur in connection with and during the performance of the contract, including but not limited to claims under the Worker's Compensation Act. The contractor agrees that it will, at all times, after the completion of the work, be responsible for, indemnify, defend and hold harmless Virginia Tech, its officers, agents and employees from all liabilities resulting from bodily or mental injury or property damage directly or indirectly arising out of the performance or nonperformance of the contract.

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13. **PRICE ESCALATION/DEESCALATION:** Price adjustments for changes in the contractor's price of materials, labor and transportation may be permitted. Request for price adjustments for any other reasons will not be granted. No price increases will be authorized for 365 calendar days after the effective date of the contract. Contractor shall give not less than 30 days advance notice prior to the annual renewal of the contract of any desired price increase.

The Contractor shall document the amount and proposed effective date of any general change in the price of materials, labor and transportation. Documentation shall be supplied with the contractor's request for increase which will (1) verify that the requested price increase is general in scope and not applicable just to Virginia Tech, and (2) verify the amount or percentage of increase which is being passed on to the contractor by the contractor's suppliers. Failure by the contractor to supply the aforementioned verification with the request for price increase will result in a delay of the effective date of such increase. The Virginia Tech Procurement Department may verify such change in price independently. The Virginia Tech Procurement Department may make such verification as it deems adequate. However, any increase which the Virginia Tech Procurement Department determines is excessive, regardless of any documentation supplied by the contractor, may be cause for cancellation of the contract by the Virginia Tech Procurement Department. The Virginia Tech Procurement Department will notify the contractor in writing of the effective date of any increase which is approved. However, the contractor shall fill all purchase orders received prior to the effective date of the price adjustments of the old contract prices.

"Across the Board" price decreases are subject to implementation at any time and shall be immediately conveyed to Virginia Tech. The contractor is further advised that price decreases which affect the price of materials, labor, and transportation are required to be passed on to Virginia Tech immediately. Failure to do so will result in action to recoup such amounts.

14. **RENEWAL OF CONTRACT:** This contract may be renewed by Virginia Tech upon written agreement of both parties for (two years) / (with options for three (3) two-year renewals), under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration.

15. **SIDEWALK POLICY**: Driving on sidewalks is allowed when there is no other way to get a needed vehicle to a designated place or building on campus. The vehicle operator shall be made aware that extreme caution shall be used to operate the vehicle in a way that will not be a hazard or hindrance to pedestrians using the walk. The contractor shall be responsible for any damage to turf and anything that is located adjacent to the walk. Parking an unattended vehicle on a sidewalk is strictly prohibited by State Law. The contractor is allowed to park a vehicle on a sidewalk if there is no other way to perform necessary work. The procedure to obtain a permit to operate a vehicle on sidewalks is the same as for the turf as outlined in Turf Policy. Any vehicle parked illegally on sidewalks shall be subject to ticketing, fines and towing if necessary.

16. **TURF POLICY:** Parking or driving on campus turf or sidewalk is strictly prohibited, except as specifically directed or otherwise allowed by the Physical Plant Grounds Department. In this case, a turf permit must be obtained from Virginia Tech Parking Services and displayed by the vehicle. Turf parking is not allowed under the canopy of any tree on campus. Any vehicle parked illegally on turf or sidewalks shall be subject to ticketing and fines.

ADDENDUM # 1 TO RFP # 5671412306

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
300 Turner Street NW
Blacksburg, Virginia 24061

DATE	DUE DATE AND HOUR
March 30, 2023	April 20, 2023 at 3:00PM

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Angela Caldwell
E-MAIL ADDRESS: acaldwell@vt.edu TELEPHONE NUMBER (540) 231-1269
FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Organizational Consulting Services

1. The following Scope of Work is being incorporated on behalf of the Diversity, Equity, Inclusion and Belonging Department.

   Purpose:

   Virginia Tech is seeking proposals for an experienced DEIB consultant with strong organizational development, strategic plan development, and capacity building experience to provide the University with diversity, equity, inclusion and belonging services.

   All proposers must be able to provide services that encompass strong organizational development and strategic plan development.

   Scope of Work:

   A. Awarded firm(s) may be asked to assess the state of diversity, equity, inclusion, and accessibility at the University. This will include a comprehensive assessment of the University's strengths, weaknesses, opportunities, and threats with respect to DEIB.

   B. Collaborate with the requesting department to articulate a clear set of DEIB goals and draft an action plan with specific activities.

   C. The Consultant will lay a foundation for a coordinated and comprehensive program to advance diversity, equity, inclusion and belonging (DEIB) in all departments of the University, with a focus on improving workforce diversity, creating a culture of inclusion and belonging.

   D. The firm(s) may provide insight and knowledge on DEIB best practices with focus on higher education.

   E. The awarded firm(s) may be asked to develop a shared language and framework including a public statement of principle regarding DEIB, that enhances the organization's ability to execute its mission, operations and strategic direction.

   F. Develop a training strategy to increase faculty/staff DEIB competencies, skills and capacity.

   G. Provide additional advice and support if needed. Virginia Tech may recognize that even with the DEIB plan in place there may be additional needs for the DEIB support.

2. The inquiry period is extended to **April 7, 2023 by 2:00PM.**

3.   All other terms, conditions and descriptions remain the same.

4.   The due date and hour remains April 20, 2023 at 3:00pm.

I acknowledge that I have read and understand this addendum in its entirety.

_____ _____
              Signature   Date

Revised 10/19/21

ADDENDUM # 2 TO RFP # 5671412306

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
300 Turner Street NW
Blacksburg, Virginia 24061

DATE	DUE DATE AND HOUR
April 14, 2023	April 26, 2023 at 3:00 pm

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Angela Caldwell, Buyer
E-MAIL ADDRESS: acaldwell@vt.edu TELEPHONE NUMBER (540) 231-1269
FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Organizational Consulting Services

The following questions have arisen as a result of this solicitation. Please see answers below in red:

1.   Is there a page limit required for the proposal submission?

Virginia Tech answer – There is no page limit; however, proposal should be constructed in a clear and concise manner.

2.   Does market research fall within the scope of strategic consulting?

Virginia Tech answer – The services sought under this contract are varying in nature and could include any number of scopes of work.

4.   Can you specify the nature of the consulting services requested?

Virginia Tech answer – See response to question 2.

5.   What are you trying to accomplish?

Virginia Tech answer - The objective of this solicitation is to establish a stable of contractors to provide Virginia Tech with a wide array of consulting services. The scope of works will be defined be individually users on campus.

6.   What is the challenge you are looking to solve or need assistance with?

Virginia Tech answer – See response to question 5.

7.   What are your expected outcomes/deliverables?

Virginia Tech answer – See response to question 5.

8.   Who would be included in the executive coaching?

Virginia Tech answer - See response to question 2.

9.   What is the nature of the change management you want to look at specifically? For example, changes due to expanding or contracting enrollments and at what levels (undergrad, grad), centralizing office or changing the nature of the work (from individualized to shared services)?

Virginia Tech answer - The organizational consulting services needs will vary across the enterprise, and the examples in your question are reasonable potential engagements. Additionally, services that aid in the efficiency of operations, improved use of technology, and continuous improvement are likely to be beneficial.

10. What offices do you foresee process improvements impacting (do you have a general sense)?

Virginia Tech answer - Process improvements are continuous at Virginia Tech and part of our change management mindset. Offices and units across Virginia Tech, both academic and administrative, expect to be impacted by process improvements.

11. Section 'PURPOSE' on page 3 of the RFP states the below. Can you please provide additional information on the past organizational consulting services? What services were provided, what projects were completed, and what were the results/outcomes of these projects?
    - "Through a past organizational consulting services opportunity, the university contracted with firms with a variety of expertise that enabled the university to progress strategic interests and investments."

Virginia Tech answer - Organizational consulting is most recently visible in Virginia Tech's enterprise scale engagements. Please see review this link for more details.

12. For the 'SMALL, WOMAN-OWNED AND MINORITY (SWAM) BUSINESS PARTICIPATION' section on page 3 of the RFP, is there a utilization goal percentage or other goals/objectives that are required or recommended be met by the proposing vendor?

Virginia Tech answer – Virginia Tech does not have a stated goal but we encourage majority firms to utilize SWaM to the greatest extent possible.

13. For section 'CONTRACT PARTICIPATION' on page 4 of the RFP, is this section provided for informational purposes or is there information that proposing vendors have to provide in their proposals to address this section?

Virginia Tech answer – Informational purposes.

14. For section 'STATEMENT OF NEEDS/SCOPE OF WORK' on page 4 of the RFP, are there any additional strategic consulting services that Virginia Tech anticipates will be needed beyond what is listed under item A.

Virginia Tech answer – Not at this time, however the needs of the University are ever changing and the awarded contractors may be required to do additional work.

15. For section 'PROPOSAL PREPARATION AND SUBMISSION' under item Client References on page 5 of the RFP, the below language is included. Can you please clarify what the anticipated size and scope of the project(s) will be for this opportunity? This does not appear to be specified in the RFP beyond a general range of strategic consisting services requested.
    - "References must be for projects that are of a similar size and scope of the project anticipated in this RFP."

Virginia Tech answer – Please include references from similar size intuitions if possible.

16. For section 'PROPOSAL PREPARATION AND SUBMISSION' under item Cost Proposal on page 5 of the RFP, is Virginia Tech just looking for hourly rates by staffing level? This section mentions request for "all costs…broken down by activity…" but anticipated projects are not specified in the RFP.

Virginia Tech answer – Please provide hourly rates.

17. For section 'PROPOSAL PREPARATION AND SUBMISSION' on page 6 of the RFP, please clarify what is meant by the below passage.
    - "Demonstrate capacity and readiness to perform service and deliverables as described."

Virginia Tech answer – Explain your firms ability to meet the criteria in the statement of needs. Specifically, describe your firms ability to take on projects and estimated response time.

18. For section 'PROPOSAL PREPARATION AND SUBMISSION' on page 6 of the RFP, it mentions "the return of the General Information Form and addenda, if any, signed and filled out as required." Are the General Information Form and addenda required for the proposal? We do not see where this documentation/information is included in the RFP.

Virginia Tech answer – The General Information Form is on page 2 of the RFP. This is required to be included with your proposal signed.

19. For Attachment A Terms and Conditions on page 10 of the RFP, are vendors permitted to note proposed exceptions and/or changes to the terms and conditions in their proposal? Would doing so disqualify the vendor from the opportunity?

Virginia Tech answer – You may submit changes to the terms and conditions; however, it will be a consideration of award.

20. As projects can range in scope and duration--is the pricing schedule allowed to have wide ranges? Or are is the University expecting static pricing on each type of service?

Virginia Tech answer – You may have multiple labor categories, but we expect one rate per category.

21. While travel costs are reimbursed at federally approved levels--time spent traveling is a factor in pricing; should that be reflected in pricing schedule by providing pricing with or without travel?

Virginia Tech answer – Time spent traveling should not be included in the pricing.

22. Perhaps a bigger picture question is, whether the pricing is expected to be static once proposal is accepted?

Virginia Tech answer – Pricing should be static throughout the life of a proposed scope of work.

23. RFP says "Vendor must provide curriculum vitae, resume or capabilities statement for all personnel that may be assigned to the university; this should include relevant experience and certifications." Does that mean vendor cannot hire or assign new personnel over the course of the contract?

Virginia Tech answer – If there is a change in personnel that provides services to Virginia Tech the contractor would be required to inform the contract administrator.

24. RFP says "Vendor will submit cost proposal that outlines job titles and corresponding rates." But vendor may assign staff and price services based on a team structure. Is that permissible?

Virginia Tech answer – This can be discussed during negotiations.

25. The RFP says "The awarded firm(s) may be required to attend meetings on campus or in other Virginia Tech locations throughout the Commonwealth of Virginia" -- will travel requirements be set as part of the scope of work for individual projects?

Virginia Tech answer – Travel will be reimbursed by the GSA Per Diem rates.

26. Are there prioritized work streams in the areas of work noted in the RFP (e.g., organization design, business process evaluation / redesign, executive coaching) to support Beyond Boundaries initiatives and if so, what is the approximate scale and desired outcomes of these work streams?

Virginia Tech answer –There are no prioritized work streams.

27. In lieu of specific work streams with determined scale (e.g., size of function) and outcomes, should vendors prepare a "small", "mid-sized", and "large-scale" pricing for our methodology with associated assumptions for the cost proposal?

Virginia Tech answer – Pricing should be provided in the form of hourly rates.

28. Will task orders be issued as fixed price or other pricing structure?

Virginia Tech answer – Fixed price based on hourly rates.

29. Does Virginia Tech have an in-house organizational change management capability?

Virginia Tech answer - Yes, this is the Office of Transformation and Change.

30. As much of the analysis appears to have been done pre-COVID, is there a need to undertake updated research and/or to revalidate the future visioning done to date?

Virginia Tech answer – Virginia Tech is committed to continuous improvements and revalidating is part of that. For example, Virginia Tech is in the process of a strategic plan refresh.

32.   Are there incumbent vendors? If yes, who are they and what projects have they completed?

Virginia Tech answer – Incumbent vendors: AASCU Penson, Accenture, Attain, B.Well, Deloitte, Empowering Leaders, Ernst Young, Gallup, Grant Thornton, Hawkeye, Huron, Kennedy and Company and KPMG. We do not have a list of all the projects that have been completed by these vendors due to the varying nature of these projects.

33.   May we bring in our SWAM subcontractors at the time a specific SOW is issued, or are we required to name specific SWAM partners at the time of this submission?

Virginia Tech answer – If your firm would like credit for SWaM subcontracting you are required to provide the names at the time of submission.

34.   Does Virginia Tech have any expectation as to when it will select the successful firm(s) for this RFP?

Virginia Tech answer – Virginia Tech hopes to have awards by January 1, 2024.

35.   Does Virginia Tech have specific initiatives stemming from Beyond Boundaries and/or the strategic plan that we should be considering?

Virginia Tech answer – Student Access and Affordability and accelerating extramural research to become a Top 100 Global Research University are two specific and current initiatives shaping the Beyond Boundaries refresh. Additionally, continued growth in our health sciences initiatives and the Innovation Campus represent significant strategic opportunities.

36.   Does Virginia Tech have an order of expected projects? If so, what are the subject areas and expected start date(s) for each?

Virginia Tech answer – Virginia Tech doesn't have any expected projects at this time.

37.   Does Virginia Tech expect to have a primary project sponsor or steering committee to which the successful firm(s) will report? If so, who does VT expect to act in this capacity?

Virginia Tech answer –The primary project sponsor or steering committee will vary depending upon the particular engagement.

39.   Are there any areas that Virginia Tech would consider out of scope for this RFP?

Virginia Tech answer – No, please provide a total capability statement with your submission.

41.   If there is an incumbent, can Virginia Tech please clarify if the workforce will remain the same for the follow-on contract?

Virginia Tech answer – The incumbent vendors is listed on question 32 on this addendum. Each department that is requesting service will have a different need.

42.   Is telework authorized?

Virginia Tech answer – Telework is authorized; however, the requesting department may require the awarded firm to come on campus.

43.   If questions are due on 3/31, will Virginia Tech consider an extension based on Q&A response time?

Virginia Tech answer – At this time Virginia Tech will not be extending.

44.   Are resumes needed for non-key personnel or part-time personnel?

Virginia Tech answer – Virginia Tech requires the resumes of any individual that will be working on this account.

45.   Are letters of commitment needed for non-key personnel or part-time personnel?

Virginia Tech answer – No.

46. Are the points for the SWaM criteria all or nothing? Is there potential for partial points based on the subcontracting form?

Virginia Tech answer – Yes, depending on the amount of subcontracting.

47. Is an appendix allowed in addition to the core document for supplemental information?

Virginia Tech answer – Virginia Tech cannot tell you how to structure your proposal.

50. In reference to Addendum #1, is the intention for us to respond to DEI as an additional service, or provide a specific/executable Scope of Work for a DEI project?

Virginia Tech answer – DEIB scope of work is an additional service. The firm is not required to have DEIB certification to submit a proposal.

54. For the cost proposal outlined in Section VII. Proposal Preparation and Submission, it asks that "Vendor will submit cost proposal that outlines job titles and corresponding rates. Provide an overview of the methodology of providing consulting services and identify all costs associated, broken down by activity, with providing services." 1) Are you asking for a rate card by title that corresponds to each service requested? 2) What do you mean by costs associated by activity i.e. what constitutes an "activity"? 3) Can you provide an example of what you are expecting to see regarding cost breakdown?

Virginia Tech answer – Virginia Tech expects to see an hourly rate broken out into labor categories.

55. What needs and areas of opportunity does Virginia Tech feel are most critical, based on previous organizational consulting services provided to the university? What takeaways or lessons learned from the previous consulting partnership are top-of-mind for Virginia Tech as you seek your next partner?

Virginia Tech answer – Virginia Tech is unable to answer this question.

56. Given planned refreshes to the strategic plan over the next year:
     a. Does Virginia Tech need an assessment of organizational capabilities, culture, leadership, etc. as an input to the strategic plan?

Virginia Tech answer – Virginia Tech may need assessments in these areas, but there is no current expectation for those services. This need may be identified by particular senior management areas in support of their strategic initiatives.

     b. Does Virginia Tech seek to make organizational changes prior to developing the new plan – or does the university seek to defer significant changes in structure, roles, and responsibilities until after the completion of the strategic plan?

Virginia Tech answer – Virginia Tech engages in change management and ongoing continuous improvements. The strategic plan is an active existing plan. There are no known organizational changes as part of the refresh.

     c. To what extent will the selected Organizational Consulting vendor be engaged in the development of the strategic plan, outside of these areas?

Virginia Tech answer – Virginia Tech does not have an expectation of a vendor being involved in strategic plan development at the university level. However, needs may be identified by senior leaders or mid-level managers for strategic planning support for their respective areas of the organization.

57. Is Virginia Tech open to employee listening (e.g., surveys, interviews, focus groups) as part of an engagement, or is the expectation that interactions will be the executive level only?

Virginia Tech answer – There is currently no define scope of work. Interactions could be at all levels of the University depending on the needs of each department.

58. Virginia Tech mentioned change management as one of the focus areas in the RFP. Is the university also looking for a vendor to assess and provide services around communications?

Virginia Tech answer – The objective of this solicitation is to establish a stable of contractors to provide Virginia Tech with a wide array of consulting services.

59. Does Virginia Tech anticipate the need for leadership assessment and coaching as part of the university's forthcoming work? If so, for how many executives?

   Virginia Tech answer – There is no define scope of work at this time.

60. Would Virginia Tech be able to provide any guidance regarding the scope of any recent third-party support or internal initiatives that directly or indirectly relate to the statement of needs provided in the solicitation?

   Virginia Tech answer – Virginia Tech cannot provide this information at this time.

61. Would the rates and terms of the contracting vehicle, if awarded, be narrowly applied to support and activities outlined in the statement of needs, or might the contracting vehicle be applied to other related work at Virginia Tech, such as technology implementations?

   Virginia Tech answer – See terms and condition number one, additional goods and service clause.

62. It is our understanding that the current RFP (RFP Number 5671412306), is a rebid of an earlier contract from 2018 (RFP Number 0058065). We have several questions about the previous contract based on RFP Number 0058065:
   a.   How many projects were conducted through the contract associated with RFP Number 0058065?

   Virginia Tech answer – This information would take weeks to obtain holding up the process of this RFP.

   b.   What is the total dollar value of the projects conducted through the contract associated with RFP Number 0058065?

   Virginia Tech answer – $3,908,607.71

   c.   Please provide a list of the types of projects (i.e., the nature of the work) conducted through the contract associated with RFP Number 0058065?

   Virginia Tech answer –The scope of works varies greatly from department to department.

63. How many respondents will be selected through this RFP?

   Virginia Tech answer – Virginia Tech will award as many contracts as necessary to fulfill our organizational consulting needs.

64. Is there a minimum points threshold that vendors must meet to be selected?

   Virginia Tech answer – No.

67. Addendum #1 includes a Scope of Work that is being incorporated on behalf of the Diversity, Equity, Inclusion and Belonging (DEIB) Department. Are items A-G in Addendum #1 replacing items A-F in Section VI. STATEMENT OF NEEDS/SCOPE OF WORK in the RFP? Or is the Scope of Work in Addendum #1 intended to be in addition to Section VI items A-F in the RFP?

   Virginia Tech answer – DEIB is not replacing the SOW A-F it is in addition too.

68. If Addendum #1 is in addition to the scope outlined in the RFP, can vendors who do not provide DEIB consulting services bid on the services outlined in items A-F of Section VI. STATEMENT OF NEEDS/SCOPE OF WORK in the RFP document?

   Virginia Tech answer – Yes, vendors that do not provide DEIB services can submit a proposal.

69. What is the nature of work that falls into "strategic advisory services" noted section VI, paragraph A of the RFP document?

   Virginia Tech answer – The needs of the University is to have a stable of contractors to provide Virginia Tech with a wide array of consulting services.

71.   If a vendor does not submit a response to a particular category of work listed in the RFP, does that preclude that vendor from bidding on future task orders / projects in that category of work?

Virginia Tech answer – No.

72.   Should the Addendum #1 for DEIB be incorporated as part of the consolidated response to the RFP vs an addendum or separate submission?

Virginia Tech answer – Please incorporate the DEIB scope of work into your submission.

73.   Which are the requesting departments who would need to articulate their DEIB goals? Can we get a list or an understanding of the number and size of these departments, for pricing.

Virginia Tech answer – The goal is to provide this service to the campus as a whole.

74.   What would be the nature of additional advise and support needed, once DEIB plans are in place?

Virginia Tech answer – The goal is to be able to call upon a stable of firms as needed for a variety of services.

75.   Please expand on what is implied by 'Capacity Building Experience' of the consultant. Is there an expectation for the consulting firm to provide DE&I training as a service?

Virginia Tech answer – Selected contractors may be required to perform DEIB training as requested by departments.

76.   Please describe the scope and work to date regarding DEIB at Virginia Tech beyond what it publicly available on your Inclusion & Diversity and Inclusive Virginia Tech website? Sub questions include:
    a.   Is Virginia Tech looking at DEIB across its entire ecosystem – faculty, staff, students, external partners, and vendors?

Virginia Tech answer – The scope of engagements will vary enterprise wide as within each department, and potentially include all of the above.

    b.   Global focus (given Beyond Boundaries vision) or North America?

Virginia Tech answer – The focus could be global or unit specific work.

    c.   What work has Virginia Tech already done regarding DEIB – for example, recent current state assessment or refreshed strategy?

Virginia Tech answer – Please see these links for DEIB efforts*.*

77.   Section I of the RFP, "Purpose," on page 3, references Virginia Tech's plan to refresh its strategic plan over the next year. Does Virginia Tech anticipate engaging a consulting firm by means of this RFP to directly support and facilitate the University's strategic planning process over the next year?

Virginia Tech answer – Virginia Tech does not have an expectation of a firm being involved in strategic plan development at the university level.

80.   Section VII.A.7 on page 6 of the RFP indicates that if a business the vendor plans "to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award."
    •   Does "the time of the award" refer to the awarding of a contract for a future specific project from a requesting department at Virginia Tech, does it refer to the selection of vendors in response to this blanket RFP?

Virginia Tech answer – The Contractor shall be SWaM certified when contractor is selected to be awarded a contract, not a future specific project.

82.   With regard to Addendum One:
    a.   Does this scope of work pertain to all staff, faculty and students?

Virginia Tech answer- The Scope of work can be varying by each department.

b.   How does VA Tech define "DEIB"?

Virginia Tech answer - Diversity: The visible and invisible characteristics and experiences that make people different. Everyone is diverse. Equity: Identifying and addressing imbalances and barriers that inhibit group and individual full engagement and success. Inclusion: The act of ensuring all groups and individuals have equitable access to resources and opportunities. Developing an understanding of unique needs and challenges are critical. Belonging: The nexus of diversity, equity and inclusion where all groups and individuals feel welcomed, valued, and are empowered to be active members in the community.

d.   Does VA Tech have a current DEIB strategy in place, and has the university done any surveys or fact-finding on DEIB previously?

Virginia Tech answer – Virginia Tech has a strategy in place; however, Virginia Tech is always looking to approve our DEIB commitment. This is why we are looking for a stable of contractors that provide these services.

e.   What, existing DEIB data does the University hold? E.g., is there an existing HR census with demographic data.

Virginia Tech answer – Procurement does not have access to this information and releasing it would require the University legal involvement.

83.   If there are any parts of this RFP that a vendor cannot support, can the vendor still respond to the proposal?

Virginia Tech answer – Yes.

84.   The guidelines state "identify all costs associated, broken down by activity, with providing services." To what level of detail should these activities and costs be broken down in the proposal?

Virginia Tech answer - Virginia Tech encourages proposers to be as detailed as possible by the types of services your organization provides. For example, if you have consulting labor costs by hour and title/role we would anticipate seeing this detail.

85.   Should this addendum be interpreted as an extension of the RFP scope or a task order?

Virginia Tech answer – Addendum number one was included to be an addition to the scope of work in the original RFP.

88.   RFP section VII.A.2 requests that "vendor must provide curriculum vitae, resume or capabilities statement for all personnel that may be assigned to the university; this should include relevant experience and certifications". Can Virginia Tech confirm that is it acceptable for vendors to provide curriculum vitae, resume or capabilities statement for all personnel within an appendix section?

Virginia Tech answer – Virginia Tech cannot tell you how to structure your proposal.

89.   Can Virginia Tech make the following revisions in quotations to Section 12 (Default) in the RFP Terms and Conditions? "In case of failure to deliver goods or services in accordance with the contract terms and conditions, Virginia Tech, after due oral or written notice and offering the Contractor a minimum of seven (7) business days to cure such failure, may procure them from other sources and hold the Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which Virginia Tech may have."

The Contractor feels it fair and reasonable to establish a defined minimum cure period to correct any failures in the unlikely event of contract default. In doing so, cure periods have historically promoted economic efficiency by leveraging the resources already mobilized on the engagement that possess the historical knowledge and understanding to cure any
deficiencies more quickly and efficiently.

Virginia Tech answer – Any revisions to Virginia Tech's terms and conditions will result in a legal review.

90.   Can Virginia Tech make the following revisions in quotations to Section 19 (Indemnification) in the RFP Terms and Conditions? "Contractor agrees to indemnify, defend and hold harmless Virginia Tech and the Commonwealth of

Virginia and their officers, agents, and employees (the "Indemnitees") from any third-party claims, damages and actions of any kind or nature whether at law or in equity, arising from or caused by the ~~use of any materials, goods, or equipment of any kind or nature, furnished by the~~ contractor's negligent performance of this contract~~/any services of any kind or nature furnished by the contractor~~, provided that such liability is not attributable to the sole negligence of Virginia Tech ~~or failure of Virginia Tech to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered~~. Except for the Contractor's gross negligence or willful misconduct, the Contractor's liability to the Indemnitees related to this contract is limited to no more than the total amount of fees paid to the contractor by Virginia Tech under this contract. Neither party will be liable for any lost profits or other indirect, consequential, incidental, punitive or special damages."

Virginia Tech answer – Any revisions to Virginia Tech's terms and conditions will result in a legal review.

91.   All other terms, conditions and descriptions remain the same.

92.   The due date and hour is changed from April 20, 2023 at 3 pm TO **April 26, 2023 at 3 pm.**

I acknowledge that I have read and understand this addendum in its entirety.

_____ _____
            Signature   Date

Revised 10/19/21

BAC
Ben Allegretti Consulting

April 26, 2023

Virginia Tech
Procurement Department
North End Center, Suite 2100
300 Turner Street, NW
Blacksburg, VA 24061

Dear Virginia Tech Procurement,

Ben Allegretti Consulting, Inc. (BAC) is pleased to present the following Technical and Pricing
Volume along with required addendums and ancillary documents for the VT Organizational
Consulting Services Request for Proposals (solicitation # # 5671412306).

We are confident the enclosed response provides VT an understanding of our capabilities, a wide
range of pricing options and the ability to coalesce the right kinds of subject matter experts matched
to each task order.

Please contact me with any questions you may have regarding this matter. My contact information is
provided below.

Sincerely,

Ben Allegretti
President, BAC, Inc.
benallegretti@bacteam.com
540-207-9512

Solicitation Title: Organizational Consulting Services
Solicitation Number: # 5671412306

Virginia Tech
Procurement Department
North End Center, Suite 2100
300 Turner Street, NW
Blacksburg, VA 24061
540-231-6221

Volume 1, Technical Response

Submitted by:	Ben Allegretti Consulting, Inc. (BAC)
Mailing Address:	188 Woodstream Blvd, Stafford, VA 22556-4629
Phone/Fax:	(540)207-9512 / (FAX) (540)657-1382
Email:	benallegretti@bacteam.com
Point of Contact	Ben Allegretti, President
Type of Company:	**Service-Disabled Veteran Owned Small Business**
DUNS:	
UEI:	

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RFP: Virginia Tech Organizational Consulting Services RFP # 5671412306

1.0 EXECUTIVE SUMMARY

Ben Allegretti Consulting (BAC) brings innovative human centered design and human factors engineering coupled with program management expertise honed at the Federal level to assist Virginia Tech (VT) drive to the next level: defining implementation milestones, correlating performance measures, and achieving the *Beyond Boundaries* strategic goals. BAC acknowledges that organizational consulting services will vary across the enterprise, and we are capable and prepared to respond to any request that VT will have.

VT's commitment to academic, administrative, and institutional excellence is evident in its significant goal and milestones achievements in the university's market value, annual fund raising, and undergraduate enrollment. Even with these accomplishments, VT continues to move toward implementation of transforming into a university of the future. BAC possesses the experience, business acumen, and collaborative approach to help VT achieve its four (4) strategic priorities: (1) Regional, National, Global impact; (2) UT PROSIM difference; (3) Talent Destination; and (4) Institutional Excellence.

BAC's core management consulting services along with our team's extensive and diverse experience at Federal agency levels gives us a unique ability to scale our team and focus our skills on discrete tasks identified by VT under the rubric of Organizational Consulting Services. We are an agile, forward thinking, results and outcome driven firm collaborating with our clients toward their organizational goals and objectives. We are experts in program and project management strategic services improving organizational and business process performance.

Our proposal outlines our organizational consulting services for VT, aimed at enhancing the university's organizational effectiveness and improving academic and administrative performance. Our team of experienced consultants will work closely with Virginia Tech's leadership and human resources team to assess organizational needs, identify areas for improvement, and develop a comprehensive plan to achieve the desired outcomes.

Our approach will involve a thorough analysis of VT's current organizational structure, processes, and culture, as well as a review of HR policies and practices. We will conduct interviews and surveys with employees at all levels to gather insights and feedback, which will inform our recommendations. Our proposed solutions will be tailored to VT's unique needs and priorities, with a focus on improving communication, collaboration, and accountability. We will work with VT's leaders to develop clear goals and metrics to measure progress and provide ongoing support and guidance throughout the implementation process. BAC has a proven track record of success in helping organizations of all sizes and industries improve their organizational effectiveness, and we are committed to delivering results that will have a positive impact on VT's mission and goals.

BAC looks forward to the opportunity to work with Virginia Tech and help build a more effective and engaged university.

RFP: Virginia Tech Organizational Consulting Services RFP # 5671412306

2.0 VENDOR PROFILE INFORMATION (SOW PG. 4., SECTION VII., A., 1.)

2.1 BAC Profile Information (SOW PG 4 Section VII, A.1.)

Legal Business Name	Ben Allegretti Consulting, Inc. (BAC)
Legal Status	Service-Disabled Veteran Owned Small Business (SDVOSB)
Year Established	2007
Address	188 Woodstream Boulevard, Stafford, VA 22556
Telephone	540-207-9512
Fax Number	540-657-1382
Website	https://www.bacteam.com

2.2 Organizational Chart (SOW PG. 4., SECTION VII., A., 1.)

BAC integrates its leadership structure with the members executing for VT. Our lead research, human factors, human centered design, data, and project leads are cross-integrated and maintain open and continuous lines of communication with both the BAC Program Manager and the VT Program Manager. Depicted in Figure 1, BAC uses daily SCRUM sessions, deconfliction of challenges and with the program lead the BAC approach is agile, scalable, and responsive to changes, updates and shifting goals. The principal officers are Ben Allegretti, BAC's President and Lead Consultant and Rixon C. Rafter, BAC's VP.
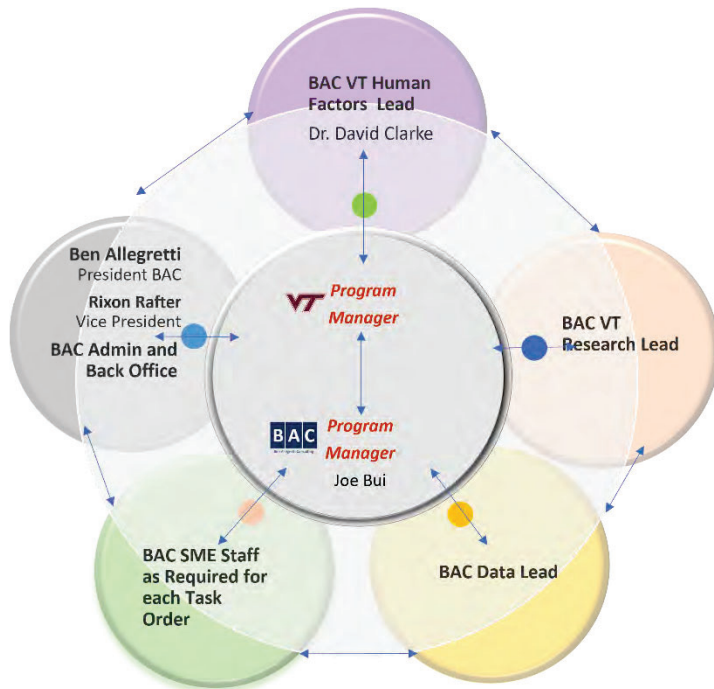

Figure 1 BAC's Integrated VT-BAC Communication Approach focused on VT leads: Gives VT near Continuous Access to BAC Leadership and Company Officers and BAC SME's Working VT task orders.

3.0 VENDOR ORGANIZATIONAL CAPABILITIES (SOW PG. 5., SECTION VII., A., 2.)

3.1 BAC Overview (SOW PG. 5., SECTION VII., A., 2.)

Ben Allegretti Consulting (BAC) is a growing 40-member Service-Disabled Veteran Owned Small Business (SDVOSB) providing strategic advisory consulting, business process analysis, program and project management, clinical informatics, human factors engineering, and user experience services to the public and private sector for over 16 years. BAC management is organized around open, verifiable, and accountable interactions scaled to meet client requirements; from supporting the largest federal agencies with clinical, nonclinical, administrative, management and execution support. BAC brings experience in management consulting, program and project management, strategic planning, stakeholder engagement, business and data analytics, business process reviews, communications management, and performance measures reporting that meets Virginia Tech's

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3.1 BAC Overview (SOW PG. 5., SECTION VII., A., 2.) (cont)

(VT) needs. We use creative and innovative approaches, industry best practices, collaborative efforts, and focused expertise to address the business processes and stakeholder outcomes our clients desire for improving organizational performance. Working in the public sector with large and small organizations, BAC is poised to provide the best strategic consulting services possible.

3.2   BAC Experience and History (SOW pg. 5., Section VII., A., 2.)

BAC has been working at the leading edge of business process, end-user requirements and process redesign and carving out centers of excellence in management consulting, healthcare informatics, human factors engineering, user experience, and information technology. Listed below in Table 1 are our capabilities related to the strategic consulting services identified in the RFP (SOW pg.4, Section VI. A.). A more detailed look at our approach, methodology, and examples of how we have applied our work is provided in Section 7.0, Capacity and Readiness. ⌷OBJ⌷

Table 1: BAC's Capabilities

VT's Desired Consulting Service	BAC's Capabilities
Organizational Design and Culture	• Experience in strategic planning, organizational design, survey design and administration, and employee engagement. • Experience coordinating, scheduling, and facilitating stakeholder focus groups either in-person or in a virtual setting. • Development of stakeholder surveys, administration, and analysis. • Deliverables include supporting strategic planning, including the development of strategic goals, objectives, strategies, performance measures, targets, improved programmatic outcomes, and linkages to programming, budgeting, and evaluations; and supporting strategic performance measure development.
Business Process Evaluation and Design	• Experience in business process reviews, evaluations, and design/redesign. • Our business process engineers have performed management and support of the analysis, design, development, and implementation of diverse, enterprise-wide processes and application systems. • We have conducted business process design/redesign studies; evaluations and assessments in support of system redesign and business process reengineering, facilitated improvement and management of business process recommendations; developed and coordinated implementation plans; and supported the process of implementing and sustaining improvements.
Change Management	• BAC boasts a team of skilled and experienced change management specialists that have assisted our clients in facilitating and implementing change within their organizations. • Our teams possess the knowledge and skills for a multidisciplinary approach to managing change and transition within organizations, programs, and projects. • We have developed plans associated with transition management, implementation of major initiatives, communications associated with major initiatives, risk assessment, and organizational transformation and culture change. • We have extensive experience and expertise in completing change management assessments and change management strategies;

	identifying and managing anticipated employee resistance; creating actionable deliverables, such as communication plans, roadmaps, coaching plans, training plans, ands resistance management plan; supporting and engaging senior leaders; supporting organizational design and definition of roles and responsibilities; integrating change management activities into project plans, and evaluating and ensuring user readiness; managing stakeholders; tracking and reporting issues; defining and measuring success metrics and monitoring change progress.
Business Analytics	• BAC's team of business and data analysts perform client tasks which ensure strategic and coordinated data systems management, accuracy and integrity of data, and reporting of data to internal and external stakeholders. • Client tasks may include ensuring timely and accurate monthly, quarterly, and annual reports as required; establishing, maintaining, and updating databases and records for recurring internal reports; recommending and implementing new operating methods to improve data flow, collection, editing, processing, and distribution; and ensuring data integrity of high-level data analysis. • Our data analysts perform client tasks which may include obtaining data through advanced computerized models; extrapolating data patterns through advanced algorithms; developing simple graphs and charts to explain how the mathematical information will influence the specific project or business; and presenting to managers how to best alter their business models to generate profitable future trends.
Process Improvement	• We have experience in business process assessments, evaluations, and design/redesign. • We use process improvement and quality management tools such as Lean Six Sigma (LSS), total quality management (TQM), continuous improvement (Kaizen), and business process management (BPM). • We use tools such as process diagrams and flow charts, fishbone diagrams, data analysis charts (i.e., Pareto, histograms, etc.). • Deliverables and tasks include conducting comprehensive analysis of client processes, data analysis, documentation, and recommendations for improvement. • Outcomes include increased productivity, streamlined workflows, adaptation to changing business needs, and increased profitability.
Project Development and Management	• Decades of experience in program and project management in the public sector. • Experience managing and supporting projects using traditional/waterfall processes as well as Agile. • Certifications in project management, Agile, and Scrum. • We developed and used PM tools such as risk registers, action items trackers, integrated management schedules (IMS), RAID logs, project portfolio systems (PPS), performance dashboards, and project management systems (i.e., Microsoft Teams, SharePoint, and Google sites).
Strategic Advisory Services	• Experience in leading and facilitating strategic planning initiatives to include environmental scans, SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis, stakeholder engagement, developing/refining organization mission/vision/values statements, organizational strategic goals, objectives, and performance measures. • Experience in acquisition, reorganization, recruitment and hiring, emergency management, employee engagement, continuity of operations, and succession planning.

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Executive Coaching	• Experience in leadership development, coaching, and training. • Experience in coordinating, scheduling, and facilitating senior and executive leadership retreats. • Ability to conduct leadership training and development in either an in-person or virtual setting.
Diversity, Inclusion, Equity, and Belonging	• Experience in providing management consulting services supporting Presidential Executive Orders (EO) related to advancing education, employment, and equity for Black Americans (EO 14050) and Hispanic Americans (EO 14045).

3.3 Key Personnel and Curriculum Vitae (SOW pg. 5., Section VII., A., 2.)

BAC's key personnel support staff includes senior program and project managers with expertise across decades of support in each of the contract focus areas. Table 2 details a sampling of our key personnel whose resumes are detailed in Attachment 1.

Table 2: Key Staff Names and Experience with VT Focus Areas

Name	Labor Category	Education and Certifications	VT Focus Area
Garnett Attipoe	Business Architect	25 years of experience, BS, PowerBI Specialist, SAFe Scrum Agilist	• Business Process Evaluation and Design • Business Analytics • Project Development and Management
MacKenzie Bowens	IT Subject Matter Expert, Testing Specialist	12 years' experience, BS	• Data Development • Data Management • Software Development
Joe Bui	Senior Program Manager	20 years' experience BA, MA, PMP	• All Task Orders and Efforts
David Clark, PhD	Senior Human Factors Engineer	20+ years' experience BS, MS, PhD	• Human Factors Business Process Evaluation and Design • Business Analytics
Dee Claxton	Senior Project Manager	20+ years' experience BA, PMP	• Organizational Design and Culture • Program and Project Management • Process Improvement • Coaching
Karla Flood	Senior Program Manager	20+ years' experience BS, PMP	• Strategic and Advisory Services • Project Development and Management
Molly Manion	Senior Instructional Systems Designer	25 years' experience, BS	• Instructional Systems Design • Process Improvement
Rixon Rafter	Senior Manager	25+ years' experience BA, MA, JD	• Change Management • Process Improvement • Business Analytics

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Octavio Samayoa	Business Process Expert	20+ years' experience BA, MBA, MS, LSS Master Black Belt	• Process Improvement • Mentoring and Coaching • Training and Education

4.0 VENDOR ACCOUNT MANAGER (SOW PG. 5., SECTION VII., A., 3.)

Joseph Bui is our BAC-VT account manager. He will abide by the requirements pertaining to the use of subcontractors. Mr. Bui does not anticipate subcontract support for most task orders and will adhere to VT Contract requirements prior to bringing any subcontract support to the BAC-VT team. Mr. Bui's contact information is: Joseph 'Joe' Bui / josephbu@bacteam.com / ▮▮▮▮▮▮▮▮ .

5.0 CLIENT REFERENCES (SOW PG. 5., SECTION VII., A., 4.)

Table 3: BAC Client References

Reference Name	Address	Telephone and Email	Point of Contact
Department of Veterans Affairs (VA)Veterans Health Administration (VHA)	▮▮▮▮▮▮	▮▮▮▮▮	▮▮▮
Department of Veterans Affairs (VA)Veterans Health Administration (VHA)	▮▮▮▮▮	▮▮▮▮▮	▮▮
Department of Veterans Affairs (VA)Veterans Benefits Administration (VBA)	▮▮▮▮	▮▮▮▮▮	▮▮▮▮

6.0 COST PROPOSAL (SOW PG. 5., SECTION VII., A., 5.)

BAC's cost proposal for the various job titles/labor categories is contained in our Cost Proposal Volume. The process we use to derive a proposed price for a project requires (1) a thorough review of VT's task order, statement of work, deliverables and timelines; (2) creation of a Work Breakdown Structure (WBS) detailing every element of the Statement of Work (SOW) against the required labor category and the estimated number of hours to complete each element of every task in the SOW; (3) identification the most economical fully burdened labor category (junior, mid-level, or senior) and fewest number of hours required to complete the highest quality deliverable; (4) multiply the total hours required by labor category with the estimated hours to complete the task; (5) derive the sum from step number four and roll individual labor category sums up into one overall cost for each deliverable. BAC further distinguishes between work that is remote from work that is onsite. Remote support is cheaper to provide to VT and as a result is discounted off on-site support costs. This five-step approach allows BAC to fine-tune its staffing to VT SOW requirements, allocate the right resources to the right project, determine the most economical proposal possible and serves as the basis for the Program Manager's initial personnel alignment to each component of each sprint/effort.

7.0 CAPACITY AND READINESS (SOW PG. 6., SECTION VII., A., 5.)

The combination of our expertise and tailored solutions demonstrates BAC's readiness and capacity to perform the requested services and deliverables. BAC understands that VT seeks to establish a contract for consulting services with a focus on organizational structure as the university moves towards the planning and implementation of its *Beyond Boundaries* strategic vision. BAC believes achieving this vision requires a VT organizational structure aligned with internal strategic goals, values, and culture. Our team of seasoned subject matter experts (SMEs) have core strengths in exactly the project management, organizational design, business process redesign, data collection and analysis, reporting and visualization, and change management expertise VT needs. We apply the techniques and methods tailored to our clients' unique organizational needs through evaluating the organizational structure, optimizing organizational design, and aligning structure and culture with strategic goals.

7.1 Organizational Design and Culture (SOW pg.4, Section VI. A.)

As VT refreshes its strategic vision and moves the *Beyond Boundaries* initiative into the planning and implementation phases, the university requires an optimized organizational structure aligned with its culture, values, and strategic goals. BAC recognizes that VT's top initiatives that shape the *Beyond Boundaries* refresh are Student Access and Affordability and accelerating extramural research to become a top 100 Global Research University. Our comprehensive approach to evaluating organizational design and structure examines the as-is organizational alignment encompassing VT's components of Leadership, Organization, Jobs and People. Our experts evaluate the alignment of organizational structure and culture, by customizing tools like communication audits, gap analysis, focus groups, facilitated stakeholder interviews, SWOT analysis and client surveys to VT's organizational needs and specifications.

Our team conducts comparative analysis of organizational alignment and design compared to organizational culture and values using, but not limited to industry tools like **Organizational Culture Assessment Instrument (OCAI)**, which measures the existing and desired levels of organizational culture and the **Competing Values Framework (CVF)**, which identifies four different types of organizational culture and helps organizations understand which type they have and how it impacts their structure. The result of the analysis provides a solid and objective measure of organizational health and a strong basis for moving forward. Our detailed analysis enables VT to gain valuable insight into the alignment (or misalignment) of the existing structure and culture and make data-driven decisions in identifying optimal future designs. We provide VT with alignment and design recommendations, to include modeling future-state options (Flat, Vertical, Vertical and Horizontal, or Boundary-less).

7.2 Business Process Evaluation and Design (SOW pg.4, Section VI. A.)

The BAC team understands VT is seeking evaluation of existing business processes [Human Resources (HR), Administrative Operations, Financial Affairs and Academic Enterprise Management]. Our team has experience in evaluating and redesigning business processes using process mapping tools, diagrams, predictive modeling, and workflow analysis using software (e.g.,

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7.2 Business Process Evaluation and Design (SOW pg.4, Section VI. A.) (cont)

Smartsheet, Lucidchart, and Camunda Platform) to assess business processes and identify deficiencies. Additionally, our team conducts operational assessments across multi-functional lines of business to improve efficiency. BAC project managers, Lean Six Sigma experts, management and data analysts, change managers, strategy experts, and user experience (UX) SMEs are engaged in daily assessments of current business processes, analysis of equipment and software, the interoperability between process and systems, workspace layout, and workforce composition.

BAC works closely with VT leadership to identify the desired future-state and roadmap the gaps between the future-state and where the organization is currently. We identify and validate requirements and break down process design and execution elements into discrete tasks performed by our VT staff as step one of the process assessments. We frequently use employee surveys and observations in the workplace and apply an iterative Human Centered Design (HCD) approach as outlined by the International Organization for Standardization (ISO) 9241. We carefully plan the process, understand context of use, specify requirements, design, and test user interfaces to improve user effectiveness, minimize mental workload, support decision making, maximize operational workflow efficiency, improve performance and user experience. The three key characteristics of our typical HCD approaches to operational assessments are: (1) developing an understanding of people, their needs, and their context of use; (2) engaging stakeholders early and throughout the iterative design process; and (3) adopting a systems approach by systematically addressing interactions between the various levels of the sociotechnical care system (people, processes, hardware/software, and other technology etc.) and the transition from individual interests to collective (integrated teams) interests for improved outcomes. Our team proposes recommendations and develops comprehensive frameworks and roadmaps for implementation to help drive VT toward the modernized future-state institution envisioned in *Beyond Boundaries*.

7.2.1 Human Resources

VT is in a competitive environment where institutions must keep up with the pace of technological advancements and ever-changing market demands. Our team understands that to maintain a competitive edge, VT is seeking management consultants to assist in evaluating and designing Hokie human resource (HR) processes. BAC's experience and expertise conducting thorough business process assessments to capture the current state of VT HR processes to include but not limited to hiring, onboarding, training, employee relations, performance appraisals and recruitment of faculty and student body. We conduct data collection using best-in-class data collection tools, or other appropriate methods. BAC data analysts make proactive recommendations on gathered data analysis. Through quantitative and qualitative analysis of performance metrics, employee feedback, and engagement surveys, in collaboration with VT stakeholders, our team identifies trends and patterns. Our experts work closely with VT to identify areas for improvement and publish findings in the required format to aid in data-driven HR decisions.

BAC recognizes one area of improvement for most universities is HR technology. Our team conducts thorough market research to understand the latest HR tools and software that would enable the automation of HR tasks, reducing manual labor and saving valuable time.

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7.2.1 Human Resources (cont)

This integrated approach to business process evaluation and redesign enables our team to develop comprehensive frameworks and roadmaps for desired future-state processes and implement change initiatives, adding to the university's overall structural efficiency.

7.2.2 Financial Affairs

BAC designs and implements enhancements to financial accuracy and transparency, reducing costs, and creating more efficient and effective financial management systems for the benefit of everyone on campus and supporting academic missions. Our management and business analysts have experience evaluating financial processes (including accounting, budgeting, procurement, contracts, and investments), finding waste and deficiencies, and deciding where improvements are needed and how to implement enterprise-wide change efforts. Our team's approach to assessing university financial affairs starts with comprehensive financial process evaluations and assessments to find the as-is state of VT financial affairs. We carry out this through quantitative data collection, risk assessments, stress tests, employee surveys, business process reviews, workflow analysis and the examination of performance metrics.

Our well-integrated team of experts tabulates results and analyzes feedback to find significant trends. In collaboration with clients, BAC identifies shortfalls and develops recommendations for processes more aligned to the desired future state. Effective financial process improvements might include automating manual processes, merging disparate systems, combining accounting and financial reporting systems into one central platform, streamlining operations, and/or enhancing analytical capabilities. BAC then conducts thorough market research to understand modern financial processing tools and automation software to make sound process improvement recommendations. BAC reports findings from the evaluation process and develops comprehensive process redesign frameworks and roadmaps for implementation of financial affairs processes consistent with VT's strategic vision.

7.2.3 Administrative Operations

VT is seeking management consulting services to assist in the evaluation and design of administrative operations, which are essential for enhancing the university's overall efficiency and productivity. BAC business analysts possess industry certifications, including Lean Six Sigma (LSS) and Project Management Professional (PMP ®) certifications to provide our public sector clients with services in business analytics, process development, evaluation, and redesign. Assessing VT's administrative operations begins with business process reviews and evaluations. We use customized industry tools, tailored to VT for analyzing performance metrics, employee feedback, and customer satisfaction in evaluating the efficiency of administrative processes. We apply Lean Six Sigma principles, tools, and techniques to closely examine and stress test administrative workflows to identify deficiencies, variance, waste, and inefficiencies. BAC conducts market research to find technological tools and software that enable the digitalization of various administrative tasks, eliminating manual and tedious processes. We report analysis

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7.2.3 Administrative Operations (cont)

findings to key stakeholders and develop recommendations and deliverables such as process workflows, future-state frameworks, and roadmaps. On past engagements, BAC recommendations involved adopting software applications to automate routine tasks such as tracking office supply inventory, managing employee records, and streamlining communication channels for faster decision-making and better coordination. We recognize a well-implemented administrative workflow management system can reduce the time and effort required to complete routine tasks by automating repetitive or mundane tasks, allowing employees to focus on higher value-added work.

7.2.4 Academic Enterprise Management

VT seeks consulting services for the evaluation and redesign of its academic enterprise management processes. BAC understands modern academic operations and leverages a breadth of experience in delivering enterprise-wide solutions to large institutions within the public sector. Our team employs a systems approach to the evaluation of academic enterprise management using industry best practices in organizational design, project management, change management, process improvement and redesign, and business analysis. The BAC team starts establishing the as-is state of the enterprise and conducting assessments like evaluating performance metrics, engagement and climate surveys, SWOT analysis, benchmarking, process and workflow assessments, stress tests, risk assessments and market analysis. Our experts perform data collection and analysis to gain insights on process and structural gaps and trends. Working with VT, the BAC team identifies actionable data for the development of recommendations and an academic enterprise framework and roadmap.

Academic enterprise management process improvements can streamline workflows and improve overall efficiency, allowing VT to better serve their students and faculty. Potential process improvements are the implementation of software systems that automate administrative tasks, freeing up time for staff to focus on more strategic initiatives and the creation of cross-functional teams to work together on projects and share knowledge across departments. BAC specializes in standardizing and simplifying processes, such as admissions or course registration, which can reduce errors and create a more consistent experience for everyone involved.

7.3 Change Management (SOW pg.4, Section VI. A.)

Examination of VT's *Beyond Boundaries* reveals the university's aim to "Strategically address the challenges and opportunities presented by the changing landscape of higher education." VT is looking for continued growth in its health science initiatives and the Innovation Campus. The BAC team understands that VT is seeking transformational change, optimized organizational structure and operational excellence. We also grasp the importance of an organizational change management strategy in the successful effort to implement enterprise process, policy, and procedure movements in organizational strategy. BAC uses a comprehensive organizational change management strategy where we conduct change readiness assessments and identify risks to the execution of strategic goals. Our change management experts implement best practices in change management such as the Prosci ADKAR model (see Figure 2 below). Our team of change managers has experience

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7.3   Change Management (SOW pg.4, Section VI. A.) (cont)

applying other change management methodologies, such as Kotter's Eight Step Process to Leading Change.

We understand the importance of stakeholder engagement and sponsorship for effective change management. We typically conduct comprehensive stakeholder engagement and sponsorship analysis to prepare briefing materials and work directly with VT to identify key stakeholders, maintain a comprehensive database of contacts, and implement outreach/communications strategies.

Working with VT's Office of Transformation and Change, BAC engages in comprehensive change management communications planning, using nationally recognized industry best practice communications planning techniques for our public sector clients. These techniques are used to identify the overarching goals of a communications plan and identify desired outcomes and metrics intended to be achieved. We identify key audiences and communication channels, develop messaging, coordinate mediums of deployment, determine the frequency and cadence of communications and broad communications campaigns.

Awareness of the need for change

Desire to participate and support the change

Knowledge on how to change

Ability to implement required skills and behaviors

Reinforcement to sustain the change

* ADKAR: A model for change in business, government and our community by Jeff Hiatt

Figure 2: ADKAR Methodology to Minimize Organizational Resistance and Maximize Stakeholder Buy-In*

The BAC team collaborates with key stakeholders on the design and implementation of effective feedback collection methods and develops a comprehensive change management plan. For our public sector clients, we facilitate internal planning meetings to strategize, develop draft plans, and engage in dialogue to ensure client feedback is implemented throughout the process. In line with client needs, this consists of a survey that measures the effectiveness of change reinforcement, based on previously defined metrics. This effort also consists of developing Key Performance Indicators (KPIs) to determine operational performance. BAC coordinates with clients to determine the best methods for recognizing employee performance in the reinforcement process.

7.3 Change Management (SOW pg.4, Section VI. A.) (cont)

Our experts contribute feedback on areas for improvement that reinforces change and helps determine metrics that affect organizational output: assessing employee performance and ensuring feedback from VT stakeholders is captured.

Recently, the BAC Team supported and then led the change management effort to mitigate the View Alerts burden on providers. Our team conducted significant environmental scanning for research and best practices, held focus groups and engaged in in-depth discussions with subject matter experts. We determined that a software enhancement tool was needed and led the effort to define software requirements and acquire the necessary resources, and then to develop, test, deploy and implement new national software for our customer. This implementation required a comprehensive change management approach, standardization of operations procedures and large-scale training effort for the entire enterprise.

7.4 Business Analytics (SOW pg.4, Section VI. A.)

Effective business analytics allows VT to transform raw data into valuable insights, improving strategic organizational decisions. BAC's approach to business and data analytics ensures the use of data to identify, measure, and analyze business performance to derive actionable intelligence and data-driven strategic decisions. Our goal is to ensure our clients realize the benefits of these decisions; being greater efficiency, productivity, and profitability. We consistently communicate with stakeholders so that when the data analysis summary reports and results are prepared for leadership acceptance, there are no surprises regarding what the results and subsequent recommendations may entail. BAC SMEs help client organizations interpret complex data sets, manage expectations, and prepare for all types of feedback generated from various stakeholder focus groups and surveys.

The BAC team delivers these products as MS PowerPoint slide decks and MS Power BI or Tableau data visualizations to communicate the overall results and actionable recommendations that will drive organizational improvement. When performing data analytics, BAC uses both quantitative and qualitative data analysis techniques to include:

- Alternative analysis- Evaluation of the various routes to achieve the goal of a project or a particular project management objective. It looks beyond the status quo to compare varied factors such as cost, risk, and may include life-cycle costing, sensitivity analysis.
- Cost-benefit analysis- Analysis of direct/indirect costs, intangibles, opportunity costs, versus the benefits of a process in direct/indirect, total benefits, net benefits.
- Earned value analysis- The expected cost difference at the end of the project: How much more or less the project is going to cost at the end and how far ahead or behind the project is on the timeline.
- Root cause analysis- Typically an Ishikawa diagram displays the various characteristics of a challenge and identify all those aspects that play into creating the issue.
- Trends analysis- Tracking variances in cost and schedule performance as a predictive model in assessing process quality and management control.

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7.5 Process Improvement (SOW pg.4, Section VI. A.) (cont)

- <u>Variance analysis</u>- Investigating the root causes and differences between the planned and the actual behaviors in a workflow or a business process.

Process improvement enhances the ability to implement its strategic vision and achieve organizational goals. BAC submits that optimized process workflows, reducing redundancies and increasing standardization wherever possible to increase efficiency within VT's internal processes. BAC's approach of continuous innovation using LSS tools such as Value Stream Mapping, the Define, Measure, Analyze, Improve and Control (DMAIC) approach, and cause-and-effect analysis drive VT toward efficiency and minimizing waste, achieving the desired organizational agility.

This methodology emphasizes an integrated approach to process improvement, focusing not only on maximizing efficiency but also on delivering value to customers, which is valuable for universities. Our process assessments begin with clarification of exactly what VT leadership seeks to accomplish with application of LSS principles. Localized training for staff and VT front office process and procedure improvement or broader process improvement for VT or establishment of a LSS Center of Excellence from which external stakeholders can draw. A shared understanding of VT's desires, values, and goals is central for our team to design an adaptive, nuanced approach addressing process improvements at VT.

7.6 Project Development and Management (SOW pg.4, Section VI. A.)

Effective project development and management is paramount in VT successfully achieving its strategic vision. BAC believes its proposed methods, techniques, recommendations, and solutions provide the University with actionable information, SMART goals and objectives that serve as a rational basis and foundation for developing actions to improve employee and student perceptions, organizational effectiveness, and efficiency. To manage the business process reviews, BAC uses the Program Management Institute (PMI) processes to guide each review as depicted in Figure 3 and described below.
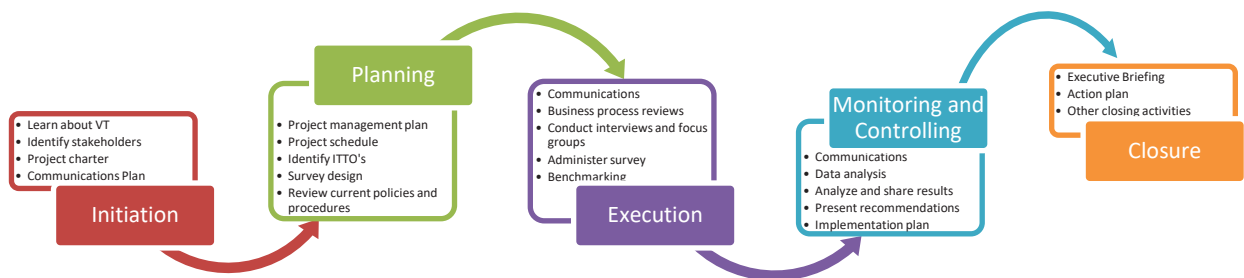

Figure 3: BAC's Project Management Process Brings VT Order, Agility, Input Options and the Ability to Influence Events and Management Execution

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7.6 Project Development and Management (SOW pg.4, Section VI. A.) (cont)

Initiation Phase: BAC meets with VT senior leadership and other key stakeholders to validate the RFP; review timelines; establish a project charter (includes clearly defined scope and deliverables); confirm goals and objectives and identify artifacts, assumptions, anticipated risks, and constraints that may occur throughout the duration of the project lifecycle. We review and validate overall intent and identify goals, objectives, and deliverables (executive summary, project management plan, data analysis reports, action plans, risk analysis, project schedules, project registers, etc.). We validate our initial messaging approach to create and gain approval for a communications plan that defines how and what VT desires to communicate to its stakeholders about the effort, the goals and exactly what the University intends as to organizational growth and development working towards the 'To-Be' state.

Planning Phase: BAC develops and executes against a Program Management Plan (PMP) and obtains VT approval for milestones and project tasks through an Integrated Master Schedule (IMS). We identify inputs, tools, techniques, and outputs (ITTOs) and integrate them into the PMP. Simultaneously, we develop a survey tool to solicit data from key stakeholders. The BAC team will commence the organizational business process evaluation and BPRs. We review the target departments' missions/vision/values, services offered, and organizational structure. We review all job descriptions and classifications, all policies and procedures related to the identified focus areas. This analysis is compared against comparable size universities and applicable national standards as part of a benchmarking effort.

Execution Phase: During the execution phase, BAC continues performing BPRs and documents the business functions while regularly informing and interfacing with the VT senior leadership and conducts regularly scheduled check-ins regarding project milestones, status updates, and any issues or challenges faced by the project team. BAC develops and administers surveys to key stakeholders while also scheduling interviews and facilitating focus groups to collect qualitative information. BAC conducts market research and benchmarking process and organizational best practices to assess policies and procedures. BAC will also compare VT's practices to that of comparable universities. Project success is evaluated against the approved IMS and the PMP. BAC manages project progress and provides status reports as decided at the project kick off meeting and detailed in the project charter. BAC maintains a risks, actions, issues, and decisions (RAID) log to track and monitor project risks, action items, identified issues, and key decisions that occur throughout the project life cycle. BAC creates and maintains status update reports using MS Teams, SharePoint, PowerPoint, Power BI, Tableau, MS Project, Word, and Excel, or other preferred client methods. This requires the tracking of information, determining what is most relevant for leadership, and drafting the actual reports.

The BAC team creates monthly and quarterly status report documents, maintains a running list of accomplishments, and provides them to university senior leadership upon request. To maintain a list of high visibility project points, we present comprehensive updates to leadership at a weekly touchpoint.

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7.6 Project Development and Management (SOW pg.4, Section VI. A.) (cont)

Monitoring and Controlling: BAC continues to execute project tasks against the IMS and PMP, and regularly informs VT senior leadership of progress, project risks, and any potential changes (all changes must be documented and approved through an established change review board). Following the execution phase where data is collected, BAC begins identifying recommendations and solutions to assist the VT in improving the effectiveness and efficiency of its internal business processes. BAC shares the results and recommendations with VT senior leadership that identify actions to move toward organizational goals. This is done through an executive summary and comprehensive action-oriented implementation plan to ensure VT leadership are fully informed of how to operationalize recommended changes.

Closure: BAC provides VT senior leadership with an executive summary, project artifacts, and a comprehensive and detailed action and implementation plan delineating how recommendations and implementation are sustained well into the future. BAC conducts other relevant project closing processes prior to concluding the project. Thorough transfer of knowledge to VT, as to any given project depends on the establishment of baseline metrics, continuous communication, integrated planning, and a dedicated SharePoint (or similar) repository for data, artifacts, and recommendations.

BAC's methodology to assist VT in implementing disciplined, comprehensive, and flexible program and project management processes is to execute our baseline Project Management Plan (PMP) approach. The use of a baseline PMP allows us to monitor project metrics, implement rigorous risk management, and provide prompt reporting on VT-approved cost, schedule, performance, and risk baselines. This approach has been successful on dozens of previous client engagements and serves as our planning and execution approach on over ten ongoing contracts. Once we baseline the process becomes iterative allowing our plan to improve based on observations and requests from VT. This provides the flexibility to continually improve our support. The elements of our approach include our Quality Control Plan (QCP), Communication Management (CoM) Plan, Risk Assessment and Mitigation Plan (RAMP), Work Breakdown Structure (WBS), and Integrated Master Schedule (IMS).

Communication Management Plan: Our CoM Plan ensures relevant and timely reporting, communication, and collaboration with stakeholders. The team is encouraged to work and communicate freely within the team and through the Program Manager to maximize team effectiveness. We will staff a full-time POC to manage all VT activities and to be available by email or phone to VT leadership, our subcontracted teammates (if any), and our employees. The Task Lead for each task is responsible for elevating matters that affect performance on the contract to the task Project Manager. For internal communication, we will use a reporting status tool to communicate the "status of health" of each of the managed activities. Our Program Manager will use Monthly Progress Reports, regularly scheduled meetings/reports, ad hoc meeting/reports, and tools in collaboration with VT staff to determine the correct communication steps and stakeholders for key project processes, events, document, and milestones.

Risk Assessment and Mitigation Plan: Our RAMP defines the approaches, tools, and sources used to perform risk management on the project. BAC implements the process in the PMBoK (Program Management Book of Knowledge) risk management process on multiple projects within VT and

7.6 Project Development and Management (SOW pg.4, Section VI. A.) (cont)

understands that it is critical function in identifying, assessing, and mitigating risks and deficiencies. The implementation of our RAMP is based on a well-documented heritage of common lessons learned in the professional support services industry. Each support effort starts with this baseline RAMP and then establishes task unique risks that are reported to VT monthly until close out. This approach ensures lessons learned are carried forward while still acknowledging that each activity is unique and requires consistent attention to ensure quality service.

<u>Work Breakdown Structure (WBS):</u> BAC collaborates with VT to implement a program architecture process with a detailed flow-down of project and system level requirements from top to bottom of the WBS to ensure consistency and correctness of schedules for timely deliverables for each work package.

<u>Integrated Master Schedule</u>: Our overarching IMS solution follows a service model industry standard IMS health metrics to provide well-rounded scheduling capabilities. Our Schedule Analysis process manages complex integrated master schedules between multiple projects and departments. This approach has been a value-added enhancement in previous enterprise efforts. When prepared for submission, the IMS created via MS Project and informed by the VT approved WBS contains milestones, accomplishments, criteria, discrete tasks/activities, work packages and planning packages, as applicable, from start to finish of the planned schedule.

BAC supports the Veterans Benefits Administration (VBA), Strategic Program Management Office (SPMO) providing project management, business analytics, strategic planning, change management, strategic communications, and administrative operations support. In our capacity as senior project managers, the BAC team manages VBA implementation of a comprehensive piece of legislation that ensures toxic-exposed Veterans can access the care and benefits they are entitled to. During the initiation and planning phases of this project, our team collaborated closely with our clients to conceptualize and develop the project plan and publish the Integrated Project Team (IPT) Project Charter. Our team has developed and published a comprehensive Project Management Plan, capturing the governance, risk management, schedule management, communications management, stakeholder management, and change management and associated processes. This is the largest active project in the Federal agency. We coordinate and monitor project activities and work products of eight discrete and disparate lines of business ensuring completeness and accuracy. Our SMEs assisted in the decomposition of project-related activities and products into work packages for the development of the project WBS and build-out the project Integrated Master Schedule (IMS), and active daily management of the project IMS; ~1500 lines of associated activities, tasks and milestones tracked, monitored, updated, and regularly reported to the Under Secretary of the VA and other VBA stakeholders. Our direct support for this project resulted in the on-time processing of the Agency's client claims and the expedited processing and award of benefits for expedited cancer claims and claims for terminally ill clients.

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7.7 Strategic Advisory Services (SOW pg.4, Section VI. A.)

VT identifies strategic advisory services as an essential aspect of the modern business/university landscape, in its strategic vision. BAC appreciates VT's need for strategic advisory services that are designed to help the university identify future market trends, assess the competition, and make data-driven decisions about VT's future. The BAC approach to strategic advisory services involves a wide range of activities, from conducting in-depth analysis of the competitive landscape and market trends, to developing comprehensive strategic plans and roadmaps that help guide university leadership decision-making and resource allocations.

BAC tailors its strategic advisory to meet the unique and nuanced needs of each of our client organizations. Our team uses tools like SWOT analysis, quantitative and qualitative data analysis, market research and analysis, and process, policy, and procedure assessments in our strategic advisory capacity. By working with BAC strategic advisors, VT can gain a clearer understanding of the institution's strengths and weaknesses, refine the university's strategies, and stay competitive in challenging times.

7.8 Executive Coaching (SOW pg.4, Section VI. A.)

VT seeks support in business analytics, organizational design and culture, strategic management consulting, and organizational change management to make effective and data-driven strategic decisions in facilitating transformational change. BAC team provides executive coaching services that range from day-to-day training approaches and multi-day facilitated workshops to 1:1 coaching sessions and crisis management support depending on stated client goals and desired outcomes. BAC SMEs develops training and coaching materials to provide individualized support, conduct comprehensive observations and provide meaningful feedback aimed to improve leadership and communications skills, achieve greater effectiveness in managing resources, develop effective conflict resolution techniques, develop stronger relationships between leaders and their teams, and maximize individual effectiveness by capitalizing on existing strengths and developing new strategies for success. We collaborate with clients in the development of materials and training criteria and outlines to ensure learning objectives. We use a collaborative approach with our customers to determine overall training and coaching goals and metrics through planning sessions where materials are developed and reviewed.

We identify and validate clear goals, with clear metrics, to measure the success of the training. BAC engages learners for feedback on the ideas developed, welcoming and implementing feedback. BAC drafts content using MS Word, MS PowerPoint, or another preferred client method, and ensures it is aligned with client objectives. After an initial presentation of the draft, BAC seeks feedback on the document, then finalizes planning documents. Once planning documents are completed, BAC follows the same steps to create the training materials. BAC ensures that all training and coaching materials are well suited for executive audiences. BAC also ensures that a Knowledge Management System (KMS) is established and implemented for the client's future reference and the retention of useful training artifacts. BAC consistently researches and manages best-in-class technical systems, to safeguard information and ensure it is managed efficiently and effectively.

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7.9 Diversity, Equity, Inclusion, and Belonging (SOW pg.4, Section VI. A.)

Virginia Tech is seeking an experienced DEIB consulting firm with strong organizational development, strategic plan development, and capacity building experience to provide the University DEIB. Internally, BAC embraces a diverse workforce allowing our team to access a broad range of skills, experiences, and perspectives in delivering platinum-level consulting services to our public sector clients. We have experience delivering project management and change management services for enterprise wide DIEB initiatives in the public sector.

In VT's strategic vision the university expresses a desire to improve DEIB in its faculty and student body. Research shows that when members of an organization feel valued and included, they are more productive, engaged and committed to the organization. BAC believes organizational improvements in DEIB benefit VT in achieving its overall strategic vision and improve the health of VT's organizational structure. By prioritizing DEIB values, VT creates a positive and inclusive environment attracting top talent and promoting success.

The BAC approach to DEIB is to use both quantitative and qualitative in developing comprehensive strategic plans addressing DEIB-related concerns. BAC uses a client specific combination of tools and techniques to include (but not limited to) data analysis, stakeholder engagements, surveys, focus groups, risk management assessments, and BPR to identify "as-is" and future-state. BAC strategic advisors then collaborate with organizational stakeholders to develop comprehensive frameworks for implementing desired DIEB outcomes.

Experienced BAC DIE SMEs, business analysts and project managers are currently involved in evaluating, analyzing, and summarizing qualitative data drawn from surveys distributed within the VBA. Our team assists government clients in analyzing and collating over 130 program activities related to achieving equity in education, employment, and economic opportunity with three underserved demographics (Hispanics, Native, and Black Americans) in coordination with White House Executive Orders 14045, 14049, and 14050. Our team engaged VA staff offices through survey methodologies to gain insights on how the implementation of the executive orders would impact operations. The result was an agency action plan delineating current activities and strategic goals to improve overall contributions to these demographics.

8.0 SWaM (Small, Women Owned and Minority) (SOW pg. 6., Section VII., A., 7.)

BAC is a Federally Certified Service-Disabled Veteran Owned Small Business (SDVOSB) with a current application to the Commonwealth of Virginia for recognition as a SWaM certified business under the SPSD Service-Disabled Veteran small business designation process.

9.0 General Information Form (SOW pg. 6., Section VII., A., 8.)

The return of the General Information Form and addenda, if any, signed and filled out as required.

Summary

Organizational consulting is an essential service for academic institutions like Virginia Tech (VT) that are seeking to improve their academic and administrative processes. BAC believes we have the right skills, experience, personnel, and management structure to provide VT with agile and

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tailorable support in management consulting, program management, strategic planning, stakeholder engagement, analytics, business process reviews, communications management, and performance measures. Our proposal outlines a comprehensive approach to help VT address its organizational challenges and improve its performance.

The proposed consulting process starts with a thorough assessment of the current organizational structure, processes, and culture at VT. This assessment involves interviews with key stakeholders, review of existing documents and reports, and data analysis to identify areas of strength and weakness. Based on the assessment, BAC develops a customized plan to address the identified issues and implement the necessary changes. The plan may include recommendations for restructuring the organization, streamlining processes, improving communication, enhancing leadership and management skills, and developing faculty and student engagement programs. BAC works closely with VT's leadership team and staff to ensure that the proposed changes are implemented successfully. The BAC team provides ongoing support and guidance throughout the process to ensure that the changes are sustained over time and lead to improved organizational performance.

BAC brings large enterprise client experiences, senior level program leads and planners anchored in a lean and focused small business approach: shirt sleeves rolled-up, listening, creating, adapting, and executing. Our services are tailored to meet the unique needs and challenges of Virginia Tech and are delivered with the highest level of professionalism and expertise. We have a team excited to support Virginia Tech and looking forward to bringing our experience growing in the Federal space to the Hokie Nation.

Volume 2: Pricing Proposal, Signed Addendums, and Resumes
Due April 26, 2023, 3:00 p.m. EST

Labor Category	Hourly Rate	Description	Minimum Education	Minimum Experience
BAC Labor Category/Job Titles Pricing for Virginia Tech (2% increase annually after second year from award date for all labor categories)				
Administrative Assistant, Junior	$66.88	Prepares reports and other program documentation, prepares graphics presentations, plans and coordinates meetings/conferences, performs data entry, filing, and reproduction. Applies familiarity with specialized and technical terminology to proofread and edit documents.	HS Diploma/BA	3 years
Administrative Assistant, Senior	$55.19			8 years
Business Architect	$116.48	Performs tasks which structure the enterprise in terms of its governance structure, business processes, and business information; align strategic goals and objectives with decisions regarding products and services, partners and suppliers, organization, capabilities, and key business and IT initiatives. Tasks may include developing a business architecture strategy based on a situational awareness of various business scenarios and motivations; applying a structured business architecture approach and methodology for capturing the key views of the enterprise; capturing the tactical and strategic enterprise goals that provide traceability through the organization and are mapped to metrics that provide ongoing governance; defining the set of strategic, core and support processes that transcend functional and organizational boundaries; identifying external entities such as customers, suppliers, and external systems that interact with the business and describing which people, resources and controls are involved in the processes; and capturing the relationships among roles, capabilities and business units, the decomposition of those business units into subunits, and the internal or external management of those units.	BA/BS degree	4 years
Business Process Engineer	$91.69	Performs management and support of the analysis, design, development, and implementation of diverse, enterprise-wide processes and application systems. Tasks may include the design study process; conducting studies in support of system redesign and business process reengineering, improvement and management; developing implementation plans; and supporting the process of implementing and sustaining improvements.	BA/BS degree	5 years
Business Process Expert	$169.37	Researches, analyzes, and recommends changes to an organization's business processes to improve operational efficiencies, quality, service, and profitability. Agile/SCRUM, LSS experience and/or certifications.	BA/BS	8 years
Change Management Specialist	$98.88	Performs tasks requiring the knowledge and skills for a multidisciplinary approach to managing change and transition within organizations, programs, and projects. Tasks may include developing plans associated with transition management, implementation of major initiatives, communications associated with major initiatives, risk assessment, and organizational transformation and culture change; completing change management assessments and change management strategy; identifying and managing anticipated resistance; creating actionable deliverables, such as a communication plan, roadmap, coaching plan, training plan, or resistance management plan; supporting and engaging senior leaders; supporting organizational design and definition of roles and responsibilities; integrating change management activities into project plan, and evaluating and ensuring user readiness; managing stakeholders; tracking and reporting issues; defining and measuring success metrics and monitoring change progress.	BA/BS degree	3 years
Communications Products Specialist, Junior	$86.48	Communications or public relations specialists may handle public relations, information output, press releases and media requests, social media and/or advertising for a wide variety of organizations	BA/BS degree	Junior: 4 years
Communications Products Specialist, Senior	$169.69			Senior: 8 years
IT/Data Analyst, Junior	$86.48	Performs tasks which may include obtaining data through advanced computerized models; extrapolating data patterns through advanced algorithms; developing simple graphs and charts to explain how the mathematical information will influence the specific project or business; and presenting to managers how to best alter their business models to generate profitable future trends.	BA/BS degree	Junior: 3 years
IT/Data Analyst, Senior	$169.71			Senior: 8 years
Data Management Specialist, Junior	$86.45	Performs tasks which ensure strategic and coordinated data systems management, accuracy and integrity of data, and reporting of data to internal and external stakeholders. Tasks may include ensuring timely and accurate monthly, quarterly and annual reports as required; establishing, maintaining, and updating databases and records for recurring internal reports; recommending and implementing new operating methods to improve data flow, collection, editing, processing and distribution; and ensuring data integrity of high level data analysis.	BA/BS degree	Junior: 3 years
Data Management Specialist, Senior	$169.18			Senior: 8 years
Editor	$93.10	Performs tasks such as writing and editing materials, such as reports, regulations, articles, newsletters, magazines, news releases, training materials, brochures, interpretive handbooks, pamphlets, guidebooks, scholarly works, reference works, speeches, or scripts. Tasks may include writing, editing, or reviewing training materials for a course, user guidebook, briefing packages, workbooks, or study reports.	BA/BS degree	4 years
Evaluation Specialist, Junior	$76.27	Designs and implements evaluation systems, measuring program impact and activities and is skilled in content analysis, quantitative tracking, and qualitative assessment. Uses tools such as surveys, focus groups, structured interviews, and secondary research. Oversees performance report generation and communication and integration of findings into current strategies. Meets with VT regularly to discuss progress, propose initiatives, and establish priorities. Develops and coordinates strategic integration of evaluation processes into program activities. Oversees performance report design and generation and communication and integration of findings into current strategies.	BA/BS	Junior: 5 years
Evaluation Specialist, Senior	$159.28			Senior: 8 years
Executive Career Coach	$169.88	Performs tasks which allow a partnership with executive clients in a thought-provoking and creative process that inspires them to maximize their professional potential. Tasks may include supporting clients through their career transition, expertly coaching clients on their job search strategy and providing them services including mock interviews, interview preparation, evaluation and salary negotiation coaching, information on networking best practices and other support as requested.	Masters	10 years
Facilitator	$95.43	Performs tasks such as defining, refining, and resolving disputes, disagreements, and divergent views; leading or facilitating group briefings and discussions; enabling focused decision-making; recording discussion content; related facilitation support services, such as debriefing stakeholders, and preparing and providing draft and final reports relating to the facilitated issues. Tasks may include facilitating meetings or training classes raining from a day to a few weeks.	BA/BS degree	3 years
Humans Factor Engineer, Junior	$108.80	The scientific discipline concerned with the understanding of interactions among humans and other elements of a system, and the profession that applies theory, principles, data and methods to design in order to optimize human well-being and overall system performance. Ergonomists contribute to the design and evaluation of tasks, jobs, products, environments and systems in order to make them compatible with the needs, abilities and limitations of people.	BS Degree	4 years
Human Factors Engineer, Mid	$150.28		BS/MS Degree	6 years
Human Factors Engineer, Senior	$220.86		PhD or similar Degree	10 years
Information Management Specialist	$76.60	Performs tasks which support program, project and organizational work through the design and control of systems that input, delete, retrieve, manipulate, and correct information in databases or automated/electronic records. Tasks may include designing and producing reports via a wide variety of information management research tools, systems, and processes.	BA/BS degree	4 years
Information Technology Specialist	$75.23	Performs tasks related to leading, administering, developing, delivering, and supporting information technology (IT) systems and services, including data storage, information assurance, software applications, networking, and systems and services used in the automated acquisition, storage, manipulation, management, movement, control, display, switching, interchange, transmission, assurance, or reception of information. Tasks may include evaluating, recommending, designing, and developing IT solutions to compile, evaluate, analyze, control, secure, and disseminate timely, relevant, objective, and accurate data and information to VT stakeholders, including, not limited to, web-based designs, data governance, operational systems, document storage, applications, models, and assessment of existing legacy systems.	BA/BS degree	4 years
Instructional System Designer, Junior	$95.75	Performs tasks related to planning, coordination, and development components of instructional design based on the findings of occupational analysis; determining the learning objectives and task learning relationships, clustering learning events, organizing course content, and developing instruction design plans; and analyzing learning problems, selecting teaching strategies using appropriate models, and developing course plans using this information. Tasks may include identifying training needs, presenting recommendations, and delivering learning solutions to address performance gaps; leveraging instructional design and performance improvement processes to analyze, design, develop, implement, and evaluate instructional materials and performance improvement programs; working with key stakeholders and subject matter experts to design and develop training interventions that incorporate best practices in behavioral and cognitive sciences to effectively address business and performance objectives.	BA/BS degree	Junior: 3 years
Instructional System Designer, Senior	$166.65			Senior: 8 years
Lean Six Sigma Specialist	$151.26	Performs tasks which require knowledge of Six Sigma philosophies and principles, including supporting systems and tools; an understanding of team dynamics and how to assign team member roles and responsibilities based on a thorough understanding of all aspects of the DMAIC model in accordance with Six Sigma principles; and Lean enterprise concepts, with the ability to identify non-value-added elements and activities using specific tools related to Lean and Six Sigma. Tasks may include employing quality management systems, tools, and techniques to help organizations transform, including, but not limited to Lean Six Sigma (LSS), ISO 9000/9001, and the Malcolm Baldrige Quality Award criteria.	BA/BS degree	4 years

BAC Labor Category/Job Titles Pricing for Virginia Tech (2% increase annually after second year from award date for all labor categories)				
Labor Category	Hourly Rate	Description	Minimum Education	Minimum Experience
Management Analyst, Junior	$94.72			Junior: 3 years
Management Analyst, Senior	$165.76	Performs tasks requiring delivery of analysis and advice for management regarding the evaluation of the effectiveness and efficiency of large scale programs and operations. Tasks may include conducting organization studies that specifically assess and analyze current organization states and management systems; performing gap analyses of differences between current and targeted states; documenting and delivering findings and recommendations; and conducting surveys, focus groups, and other accepted techniques for data collection in support of organization studies that specifically assess and analyze current organization states and management systems.	BA/BS degree	Senior: 8 years
Process Improvement Specialist I	$101.13			Level I: 1 year
Process Improvement Specialist II	$165.94		AAS Degree	Level II: 5 years
Process Improvement Specialist III	$195.58	Performs evaluating, planning, and recommending improvements to VT. The individual can also facilitate brainstorming events that are focused on the improvement of processes within the organization.		Level III: 10 years
Project Manager	$117.52	Performs responsibilities of initiating, planning, executing, controlling, and finalizing work on indivdual projects supporting broader VT efforts to achieve specific goals and meet specific success criteria. Application of knowledge, skills, tools, and techniques to project activities to meet the project requirements and milestones.		Senior 8 years
Program Manager	$162.11	Performs responsibilities of initiating, planning, executing, controlling, and closing the work of the VT support team to achieve specific goals and meet specific success criteria. Application of knowledge, skills, tools, and techniques to project activities to meet the project requirements and milestones.		Senior 8 years
Quality Management Specialist	$108.93	Performs tasks related to promoting systems and techniques assuring the quality of products and services including the development of plans and programs for achieving and maintaining product and service quality throughout the product/service life cycle; monitoring operations to prevent the production of defects and to verify adherence to quality plans and requirements; and analysis and investigation of adverse quality trends or conditions and initiation of corrective action. Tasks may include employing quality management systems, tools, and techniques to help organizations transform, including, but not limited to ISO 9000/9001, and the Malcolm Baldrige Quality Award criteria.	BA/BS degree	4 years
Requirements Manager	$95.94	Manages and verifys VT customer requirements; captures detailed descriptions of system capability and functionality; and ensures the project team has clear, consistent, and testable requirements documented in test plans, test procedures, and completion criteria. Reviews requirements with VT customer representatives. Develops and maintain the Requirements Verification Traceability Matrix (RVTM) or similar tracking tool. Coordinated with the Test Engineers to align testing priorities with the business needs and confirmed requirements. Supports Change Control processes and VT review boards to ensure that the appropriate categorization and disposition of all requirements. Supports the Program Manager and Contracts Administrator for requirements disposition, when an explicit requirement cannot be met as specified, to revise the requirement with the customer.		
Research Assistant	$82.88	Performs tasks which support the relevant research of a project. Tasks may include conducting literature or other relevant research; supporting the development of project deliverables such as position papers, guides and cognitive interview materials; providing administrative research support; maintaining documents and records for assigned tasks; and utilizing external resources to supplement, organize, and contribute to tasks and deliverables.	Baccalaureate Candidate	3 years
Research Intern	$43.74	Performs tasks which support the relevant research of a project. Tasks may include conducting literature or other relevant research; supporting the development of project deliverables such as position papers, guides and cognitive interview materials; providing administrative research support; maintaining documents and records for assigned tasks; and utilizing external resources to supplement, organize, and contribute to tasks and deliverables.	Baccalaureate Candidate	0 Years
Researcher	$97.80	Performs tasks related to performing research, or other professional and scientific work, in one or more of the social sciences, including economics, psychology, social work, or in the administration of public welfare and insurance programs. Tasks may include developing and conducting experimental research design plans; translating data into actionable insight; and conducting site visits or phone interviews to support the research team.	Masters	6 years
Senior Consultant	$115.51		MA/MBA Degree	10 years
Junior Consultant	$74.60	Analyzes client information and develops and evaluates top-line outreach strategies to meet objectives. Demonstrates in-depth knowledge and manages the client service aspects of the account portfolio and assumes responsibility for bottom-line results. Develops and implements high-level strategic communications; manages, motivates, and leads staff; and builds and manages project teams. Ensures the contract team performs work on schedule and budget.	BA	6 years
Statistician, Junior	$102.49			Junior: 3 years
Statistician, Senior	$149.57	Performs tasks related to applying statistical theories, techniques, and methods to gather, analyze, interpret, and/or report quantified information. Tasks may include performing valid and useful analyses of data sets in support of task areas using existing data or data to be collected.	BA/BS degree	Senior: 8 years
Strategic Planner, Junior	$99.57		BA/BS degree	Junior: 3 years
Strategic Planner, Senior	$146.33	Performs tasks related to providing content and process expertise for providing advice for establishing and implementing a strategic direction. Tasks may include supporting strategic planning, including the development of strategic goals, objectives, strategies, performance measures, targets, improved programmatic outcomes, and linkages to programming, budgeting and evaluations; supporting strategic performance measure development, including improved linkage between VT-wide strategic goals and programmatic outcomes.	MA	Senior: 8 years
Subject Matter Expert	$166.08	Performs tasks requiring a recognized level of expertise in a specified subject area.	Masters	8 years
Subject Matter Expert – CHANGE IMPLEMENTATION	$168.42	The contractor shall designate a Change Implementation SME to support VT in executing organizational change. The staff shall assist in the development and conducting of stakeholder analyses, impact analyses, and implementation planning. The Change Implementation SME shall also provide input on the associated risks resulting from the change activities in the organization and to the VT stakeholder Community.	Master's	8 years
Subject Matter Expert – COMMUNICATIONS	$159.06	Corporate knowledge of large-scale communications in a learning/institutional setting; knowledge/experience with stakeholder outreach and communication campaigns; media analysis regarding social media platforms; experience with implementing successful (proven) communications campaigns in an integrated setting. Provide expert advice related to strategic communications for both internal and external stakeholders.	Master's	8 years
Subject Matter Expert – PROGRAM IMPLEMENTATION	$183.75	The contractor shall designate Program Implementation staff to implement new Projects and/or Programs, as identified by senior VT leadership. The Projects and/or Programs may or may not be VT enterprise wide, or may be localized to a single, or multiple VT entities. Tasks will include release and implementation management, supporting performance outcomes, targets, improved programmatic outcomes, and linkages to programming, budgeting and evaluations; supporting strategic performance measure development, including improved linkage between VT-wide strategic goals and programmatic outcomes.	Master's	8 years
Subject Matter Expert –EDUCATION LEADERSHIP	$183.75	Education Leadership SME experts support VT in the analysis, design, development, and implementation of appropriate business processes within the organization. The EL SME shall assist VT with the analysis of current and future state concepts for the VT; development of new business processes; diagnosis of current problems, and redesign, reconstruction, and monitoring processes to make sure they are effective. The SME shall assist VT with the continuous analysis per policy or organizational changes.	Master's	8 years
Subject Matter Expert -Functional	$163.77	"Functional Responsibilities: A Functional/SME requires a minimum of ten years XXXXXX consulting experience. Experience include management and direction on project engagements, working experience in project definition and business and systems analysis, creation of competitive strategies, cost benefit analysis for make/buy decisions and integration of system to system business solutions across an integrated delivery system. A Functional/SME works with the Project Director and other senior staff to monitor the status of the engagement, identify potential risks, issues, advises and consults on all significant developments, and designs a strategy for addressing them and monitor quality. A Functional/SME is proficient in reviewing strategic plans and business strategies and design, organizational and infrastructure designs, and project deliverables to maintain a standard of consistency and quality throughout a project's life cycle.	Master's	8 years

Labor Category	Hourly Rate	Description	Minimum Education	Minimum Experience
BAC Labor Category/Job Titles Pricing for Virginia Tech (2% increase annually after second year from award date for all labor categories)				
Technical Writer, Junior	$59.59	Experience writing, editing, publishing reports and technical documents. Strong experience with computer based systems. Gathers, analyzes and composes technical information required for preparation of user manuals, training materials, installation guides, proposals, reports, etc. Edits functional descriptions, system specifications, user manuals, special reports, or any other customer deliverables and documents. Conducts research and ensures the use of proper technical terminology. Translates technical information into clear, readable documents to be used by technical and non-technical personnel.	HS Diploma	Junior: 3 years
Technical Writer, Senior	$83.00			Senior: 8 years
Training Analyst	$93.16	Performs tasks related to the development and maintenance of all user documentation and training materials. Tasks may include developing and maintaining traditional and non-traditional user support materials, such as e-learning and job aids; providing training support, both in person and online, on an as-needed basis; conducting business process reviews with clients to understand current workflows; preparing gap analysis and requirements documentation; authoring software specifications for enhancements to a system; preparing training plans; and participating in go-live events.	BA/BS degree	4 years
Trainer, Junior	$86.20			Junior: 3 years
Trainer, Senior	$105.52	Performs tasks related to the planning, creating, and executing test administration, learning management, customized subject matter specific training and educational courses that are delivered via an instructor-led (traditional classroom setting or conference/seminar) or web-based (Internet/Intranet, software packages and computer applications) system. Tasks may include conducting evaluations; analyzing and identifying communication and skill requirements; translating needs into workshop and remedial training modules; developing and revising workbooks and class instructional materials associated with standard and customized workshops; performing training related administrative tasks; developing and maintaining training databases; conducting face-to-face and online training; attending and participating in meetings and committees; and making presentations as needed.	BA/BS degree	Senior: 8 years

RFP # 5671412306, Organizational Consulting Services

INCLUDE THIS PAGE WITH YOUR PROPOSAL, SIGNATURE AT SUBMISSION IS REQUIRED

DUE DATE: Proposals will be received until April 20, 2023 at 3:00 PM. Failure to submit proposals to the correct location by the designated date and hour will result in disqualification.

INQUIRIES: All inquiries for information regarding this solicitation should be directed to Angela Caldwell, Phone: (540) 231-1269 e-mail: acaldwell@vt.edu. All inquiries will be answered in the form of an addendum. Inquiries must be submitted by 2:00PM on March 31, 2023. Inquiries must be submitted to the procurement officer identified in this solicitation.

PROPOSAL SUBMISSION:
Proposals may NOT be hand delivered to the Procurement Office.

Virginia Tech has partnered with Bonfire Interactive to create a new procurement portal that will allow you to access business opportunities and submit bids and proposals to Virginia Tech digitally.

Proposals must be submitted electronically at:
https://procurement-vt.bonfirehub.com/.

Vendors are requested to visit the new Procurement Portal then follow the link to the Bonfire vendor registration page to register your company. Registration is underline easy and free. If you have any challenges with the registration process, please contact Bonfire Interactive Support at support@gobonfire.com .

It is encouraged for all vendors to register prior to the proposal submission deadline to avoid late submissions. Log into your Bonfire Vendor account in order to access the opportunity and begin preparing your submission. Upon completion you will be directed to your Submission Receipt. Virginia Tech will not confirm receipt of proposals. It is the responsibility of the offeror to make sure their proposal is delivered on time.

For a quick tutorial on how to upload a submittal, visit: https://support.gobonfire.com/hc/en-us/articles/360011034814-Creating-and-Uploading-a-Submission-for-Vendors-?_ga=2.42375717.1472165071.1588110542-997330893.1585332052

Hard copy or email proposals will not be accepted. Late proposals will not be accepted, nor will additional time be granted to any individual Vendor.

Attachments must be smaller than 1000MB in order to be received by the University.

In compliance with this Request For Proposal and to all the conditions imposed therein and hereby incorporated by reference, the undersigned offers and agrees to furnish the goods or services in accordance with the attached signed proposal and as mutually agreed upon by subsequent negotiation.

AUTHORIZED SIGNATURE: _____ Date: _20 Apr 2023_

06/27/2022

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2

ADDENDUM # 1 TO RFP # 5671412306

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
300 Turner Street NW
Blacksburg, Virginia 24061

DATE	DUE DATE AND HOUR
March 30, 2023	April 20, 2023 at 3:00PM

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Angela Caldwell
E-MAIL ADDRESS: acaldwell@vt.edu TELEPHONE NUMBER (540) 231-1269
FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Organizational Consulting Services

1. The following Scope of Work is being incorporated on behalf of the Diversity, Equity, Inclusion and Belonging Department.

   Purpose:

   Virginia Tech is seeking proposals for an experienced DEIB consultant with strong organizational development, strategic plan development, and capacity building experience to provide the University with diversity, equity, inclusion and belonging services.

   All proposers must be able to provide services that encompass strong organizational development and strategic plan development.

   Scope of Work:

   A. Awarded firm(s) may be asked to assess the state of diversity, equity, inclusion, and accessibility at the University. This will include a comprehensive assessment of the University's strengths, weaknesses, opportunities, and threats with respect to DEIB.

   B. Collaborate with the requesting department to articulate a clear set of DEIB goals and draft an action plan with specific activities.

   C. The Consultant will lay a foundation for a coordinated and comprehensive program to advance diversity, equity, inclusion and belonging (DEIB) in all departments of the University, with a focus on improving workforce diversity, creating a culture of inclusion and belonging.

   D. The firm(s) may provide insight and knowledge on DEIB best practices with focus on higher education.

   E. The awarded firm(s) may be asked to develop a shared language and framework including a public statement of principle regarding DEIB, that enhances the organization's ability to execute its mission, operations and strategic direction.

   F. Develop a training strategy to increase faculty/staff DEIB competencies, skills and capacity.

   G. Provide additional advice and support if needed. Virginia Tech may recognize that even with the DEIB plan in place there may be additional needs for the DEIB support.

2. The inquiry period is extended to **April 7, 2023 by 2:00PM.**

3.   All other terms, conditions and descriptions remain the same.

4.   The due date and hour remains April 20, 2023 at 3:00pm.

I acknowledge that I have read and understand this addendum in its entirety.

_____   23 Apr 21
            Signature   Date

Revised 10/19/21

ADDENDUM # 2 TO RFP # 5671412306

VIRGINIA POLYTECHNIC INSTITUTE AND STATE UNIVERSITY (Virginia Tech)
Procurement Department (MC 0333)
North End Center, Suite 2100
300 Turner Street NW
Blacksburg, Virginia 24061

DATE	DUE DATE AND HOUR
April 14, 2023	April 26, 2023 at 3:00 pm

ADDRESS ALL INQUIRIES AND CORRESPONDENCE TO: Angela Caldwell, Buyer
E-MAIL ADDRESS: acaldwell@vt.edu TELEPHONE NUMBER (540) 231-1269
FAX NUMBER (540) 231-9628 AFTER HOUR MESSAGES (540) 231-6221

Organizational Consulting Services

The following questions have arisen as a result of this solicitation. Please see answers below in red:

1. Is there a page limit required for the proposal submission?

    Virginia Tech answer – There is no page limit; however, proposal should be constructed in a clear and concise manner.

2. Does market research fall within the scope of strategic consulting?

    Virginia Tech answer – The services sought under this contract are varying in nature and could include any number of scopes of work.

4. Can you specify the nature of the consulting services requested?

    Virginia Tech answer – See response to question 2.

5. What are you trying to accomplish?

    Virginia Tech answer - The objective of this solicitation is to establish a stable of contractors to provide Virginia Tech with a wide array of consulting services. The scope of works will be defined be individually users on campus.

6. What is the challenge you are looking to solve or need assistance with?

    Virginia Tech answer – See response to question 5.

7. What are your expected outcomes/deliverables?

    Virginia Tech answer – See response to question 5.

8. Who would be included in the executive coaching?

    Virginia Tech answer - See response to question 2.

9. What is the nature of the change management you want to look at specifically? For example, changes due to expanding or contracting enrollments and at what levels (undergrad, grad), centralizing office or changing the nature of the work (from individualized to shared services)?

    Virginia Tech answer - The organizational consulting services needs will vary across the enterprise, and the examples in your question are reasonable potential engagements. Additionally, services that aid in the efficiency of operations, improved use of technology, and continuous improvement are likely to be beneficial.

10. What offices do you foresee process improvements impacting (do you have a general sense)?

Virginia Tech answer - Process improvements are continuous at Virginia Tech and part of our change management mindset. Offices and units across Virginia Tech, both academic and administrative, expect to be impacted by process improvements.

11. Section 'PURPOSE' on page 3 of the RFP states the below. Can you please provide additional information on the past organizational consulting services? What services were provided, what projects were completed, and what were the results/outcomes of these projects?
   - "Through a past organizational consulting services opportunity, the university contracted with firms with a variety of expertise that enabled the university to progress strategic interests and investments."

Virginia Tech answer - Organizational consulting is most recently visible in Virginia Tech's enterprise scale engagements. Please see review this link for more details.

12. For the 'SMALL, WOMAN-OWNED AND MINORITY (SWAM) BUSINESS PARTICIPATION' section on page 3 of the RFP, is there a utilization goal percentage or other goals/objectives that are required or recommended be met by the proposing vendor?

Virginia Tech answer – Virginia Tech does not have a stated goal but we encourage majority firms to utilize SWaM to the greatest extent possible.

13. For section 'CONTRACT PARTICIPATION' on page 4 of the RFP, is this section provided for informational purposes or is there information that proposing vendors have to provide in their proposals to address this section?

Virginia Tech answer – Informational purposes.

14. For section 'STATEMENT OF NEEDS/SCOPE OF WORK' on page 4 of the RFP, are there any additional strategic consulting services that Virginia Tech anticipates will be needed beyond what is listed under item A.

Virginia Tech answer – Not at this time, however the needs of the University are ever changing and the awarded contractors may be required to do additional work.

15. For section 'PROPOSAL PREPARATION AND SUBMISSION' under item Client References on page 5 of the RFP, the below language is included. Can you please clarify what the anticipated size and scope of the project(s) will be for this opportunity? This does not appear to be specified in the RFP beyond a general range of strategic consisting services requested.
   - "References must be for projects that are of a similar size and scope of the project anticipated in this RFP."

Virginia Tech answer – Please include references from similar size intuitions if possible.

16. For section 'PROPOSAL PREPARATION AND SUBMISSION' under item Cost Proposal on page 5 of the RFP, is Virginia Tech just looking for hourly rates by staffing level? This section mentions request for "all costs…broken down by activity…" but anticipated projects are not specified in the RFP.

Virginia Tech answer – Please provide hourly rates.

17. For section 'PROPOSAL PREPARATION AND SUBMISSION' on page 6 of the RFP, please clarify what is meant by the below passage.
   - "Demonstrate capacity and readiness to perform service and deliverables as described."

Virginia Tech answer – Explain your firms ability to meet the criteria in the statement of needs. Specifically, describe your firms ability to take on projects and estimated response time.

18. For section 'PROPOSAL PREPARATION AND SUBMISSION' on page 6 of the RFP, it mentions "the return of the General Information Form and addenda, if any, signed and filled out as required." Are the General Information Form and addenda required for the proposal? We do not see where this documentation/information is included in the RFP.

Virginia Tech answer – The General Information Form is on page 2 of the RFP. This is required to be included with your proposal signed.

19. For Attachment A Terms and Conditions on page 10 of the RFP, are vendors permitted to note proposed exceptions and/or changes to the terms and conditions in their proposal? Would doing so disqualify the vendor from the opportunity?

Virginia Tech answer – You may submit changes to the terms and conditions; however, it will be a consideration of award.

20. As projects can range in scope and duration--is the pricing schedule allowed to have wide ranges? Or are is the University expecting static pricing on each type of service?

Virginia Tech answer – You may have multiple labor categories, but we expect one rate per category.

21. While travel costs are reimbursed at federally approved levels--time spent traveling is a factor in pricing; should that be reflected in pricing schedule by providing pricing with or without travel?

Virginia Tech answer – Time spent traveling should not be included in the pricing.

22. Perhaps a bigger picture question is, whether the pricing is expected to be static once proposal is accepted?

Virginia Tech answer – Pricing should be static throughout the life of a proposed scope of work.

23. RFP says "Vendor must provide curriculum vitae, resume or capabilities statement for all personnel that may be assigned to the university; this should include relevant experience and certifications." Does that mean vendor cannot hire or assign new personnel over the course of the contract?

Virginia Tech answer – If there is a change in personnel that provides services to Virginia Tech the contractor would be required to inform the contract administrator.

24. RFP says "Vendor will submit cost proposal that outlines job titles and corresponding rates." But vendor may assign staff and price services based on a team structure. Is that permissible?

Virginia Tech answer – This can be discussed during negotiations.

25. The RFP says "The awarded firm(s) may be required to attend meetings on campus or in other Virginia Tech locations throughout the Commonwealth of Virginia" -- will travel requirements be set as part of the scope of work for individual projects?

Virginia Tech answer – Travel will be reimbursed by the GSA Per Diem rates.

26. Are there prioritized work streams in the areas of work noted in the RFP (e.g., organization design, business process evaluation / redesign, executive coaching) to support Beyond Boundaries initiatives and if so, what is the approximate scale and desired outcomes of these work streams?

Virginia Tech answer –There are no prioritized work streams.

27. In lieu of specific work streams with determined scale (e.g., size of function) and outcomes, should vendors prepare a "small", "mid-sized", and "large-scale" pricing for our methodology with associated assumptions for the cost proposal?

Virginia Tech answer – Pricing should be provided in the form of hourly rates.

28. Will task orders be issued as fixed price or other pricing structure?

Virginia Tech answer – Fixed price based on hourly rates.

29. Does Virginia Tech have an in-house organizational change management capability?

Virginia Tech answer - Yes, this is the Office of Transformation and Change.

30. As much of the analysis appears to have been done pre-COVID, is there a need to undertake updated research and/or to revalidate the future visioning done to date?

Virginia Tech answer – Virginia Tech is committed to continuous improvements and revalidating is part of that. For example, Virginia Tech is in the process of a strategic plan refresh.

32. Are there incumbent vendors? If yes, who are they and what projects have they completed?

   Virginia Tech answer – Incumbent vendors: AASCU Penson, Accenture, Attain, B.Well, Deloitte, Empowering Leaders, Ernst Young, Gallup, Grant Thornton, Hawkeye, Huron, Kennedy and Company and KPMG. We do not have a list of all the projects that have been completed by these vendors due to the varying nature of these projects.

33. May we bring in our SWAM subcontractors at the time a specific SOW is issued, or are we required to name specific SWAM partners at the time of this submission?

   Virginia Tech answer – If your firm would like credit for SWaM subcontracting you are required to provide the names at the time of submission.

34. Does Virginia Tech have any expectation as to when it will select the successful firm(s) for this RFP?

   Virginia Tech answer – Virginia Tech hopes to have awards by January 1, 2024.

35. Does Virginia Tech have specific initiatives stemming from Beyond Boundaries and/or the strategic plan that we should be considering?

   Virginia Tech answer – Student Access and Affordability and accelerating extramural research to become a Top 100 Global Research University are two specific and current initiatives shaping the Beyond Boundaries refresh. Additionally, continued growth in our health sciences initiatives and the Innovation Campus represent significant strategic opportunities.

36. Does Virginia Tech have an order of expected projects? If so, what are the subject areas and expected start date(s) for each?

   Virginia Tech answer – Virginia Tech doesn't have any expected projects at this time.

37. Does Virginia Tech expect to have a primary project sponsor or steering committee to which the successful firm(s) will report? If so, who does VT expect to act in this capacity?

   Virginia Tech answer –The primary project sponsor or steering committee will vary depending upon the particular engagement.

39. Are there any areas that Virginia Tech would consider out of scope for this RFP?

   Virginia Tech answer – No, please provide a total capability statement with your submission.

41. If there is an incumbent, can Virginia Tech please clarify if the workforce will remain the same for the follow-on contract?

   Virginia Tech answer – The incumbent vendors is listed on question 32 on this addendum. Each department that is requesting service will have a different need.

42. Is telework authorized?

   Virginia Tech answer – Telework is authorized; however, the requesting department may require the awarded firm to come on campus.

43. If questions are due on 3/31, will Virginia Tech consider an extension based on Q&A response time?

   Virginia Tech answer – At this time Virginia Tech will not be extending.

44. Are resumes needed for non-key personnel or part-time personnel?

   Virginia Tech answer – Virginia Tech requires the resumes of any individual that will be working on this account.

45. Are letters of commitment needed for non-key personnel or part-time personnel?

Virginia Tech answer – No.

46. Are the points for the SWaM criteria all or nothing? Is there potential for partial points based on the subcontracting form?

Virginia Tech answer – Yes, depending on the amount of subcontracting.

47. Is an appendix allowed in addition to the core document for supplemental information?

Virginia Tech answer – Virginia Tech cannot tell you how to structure your proposal.

50. In reference to Addendum #1, is the intention for us to respond to DEI as an additional service, or provide a specific/executable Scope of Work for a DEI project?

Virginia Tech answer – DEIB scope of work is an additional service. The firm is not required to have DEIB certification to submit a proposal.

54. For the cost proposal outlined in Section VII. Proposal Preparation and Submission, it asks that "Vendor will submit cost proposal that outlines job titles and corresponding rates. Provide an overview of the methodology of providing consulting services and identify all costs associated, broken down by activity, with providing services." 1) Are you asking for a rate card by title that corresponds to each service requested? 2) What do you mean by costs associated by activity i.e. what constitutes an "activity"? 3) Can you provide an example of what you are expecting to see regarding cost breakdown?

Virginia Tech answer – Virginia Tech expects to see an hourly rate broken out into labor categories.

55. What needs and areas of opportunity does Virginia Tech feel are most critical, based on previous organizational consulting services provided to the university? What takeaways or lessons learned from the previous consulting partnership are top-of-mind for Virginia Tech as you seek your next partner?

Virginia Tech answer – Virginia Tech is unable to answer this question.

56. Given planned refreshes to the strategic plan over the next year:
    a. Does Virginia Tech need an assessment of organizational capabilities, culture, leadership, etc. as an input to the strategic plan?

Virginia Tech answer – Virginia Tech may need assessments in these areas, but there is no current expectation for those services. This need may be identified by particular senior management areas in support of their strategic initiatives.

    b. Does Virginia Tech seek to make organizational changes prior to developing the new plan – or does the university seek to defer significant changes in structure, roles, and responsibilities until after the completion of the strategic plan?

Virginia Tech answer – Virginia Tech engages in change management and ongoing continuous improvements. The strategic plan is an active existing plan. There are no known organizational changes as part of the refresh.

    c. To what extent will the selected Organizational Consulting vendor be engaged in the development of the strategic plan, outside of these areas?

Virginia Tech answer – Virginia Tech does not have an expectation of a vendor being involved in strategic plan development at the university level. However, needs may be identified by senior leaders or mid-level managers for strategic planning support for their respective areas of the organization.

57. Is Virginia Tech open to employee listening (e.g., surveys, interviews, focus groups) as part of an engagement, or is the expectation that interactions will be the executive level only?

Virginia Tech answer – There is currently no define scope of work. Interactions could be at all levels of the University depending on the needs of each department.

58. Virginia Tech mentioned change management as one of the focus areas in the RFP. Is the university also looking for a vendor to assess and provide services around communications?

Virginia Tech answer – The objective of this solicitation is to establish a stable of contractors to provide Virginia Tech with a wide array of consulting services.

59. Does Virginia Tech anticipate the need for leadership assessment and coaching as part of the university's forthcoming work? If so, for how many executives?

   Virginia Tech answer – There is no define scope of work at this time.

60. Would Virginia Tech be able to provide any guidance regarding the scope of any recent third-party support or internal initiatives that directly or indirectly relate to the statement of needs provided in the solicitation?

   Virginia Tech answer – Virginia Tech cannot provide this information at this time.

61. Would the rates and terms of the contracting vehicle, if awarded, be narrowly applied to support and activities outlined in the statement of needs, or might the contracting vehicle be applied to other related work at Virginia Tech, such as technology implementations?

   Virginia Tech answer – See terms and condition number one, additional goods and service clause.

62. It is our understanding that the current RFP (RFP Number 5671412306), is a rebid of an earlier contract from 2018 (RFP Number 0058065). We have several questions about the previous contract based on RFP Number 0058065:
   a. How many projects were conducted through the contract associated with RFP Number 0058065?

   Virginia Tech answer – This information would take weeks to obtain holding up the process of this RFP.

   b. What is the total dollar value of the projects conducted through the contract associated with RFP Number 0058065?

   Virginia Tech answer – $3,908,607.71

   c. Please provide a list of the types of projects (i.e., the nature of the work) conducted through the contract associated with RFP Number 0058065?

   Virginia Tech answer –The scope of works varies greatly from department to department.

63. How many respondents will be selected through this RFP?

   Virginia Tech answer – Virginia Tech will award as many contracts as necessary to fulfill our organizational consulting needs.

64. Is there a minimum points threshold that vendors must meet to be selected?

   Virginia Tech answer – No.

67. Addendum #1 includes a Scope of Work that is being incorporated on behalf of the Diversity, Equity, Inclusion and Belonging (DEIB) Department. Are items A-G in Addendum #1 replacing items A-F in Section VI. STATEMENT OF NEEDS/SCOPE OF WORK in the RFP? Or is the Scope of Work in Addendum #1 intended to be in addition to Section VI items A-F in the RFP?

   Virginia Tech answer – DEIB is not replacing the SOW A-F it is in addition too.

68. If Addendum #1 is in addition to the scope outlined in the RFP, can vendors who do not provide DEIB consulting services bid on the services outlined in items A-F of Section VI. STATEMENT OF NEEDS/SCOPE OF WORK in the RFP document?

   Virginia Tech answer – Yes, vendors that do not provide DEIB services can submit a proposal.

69. What is the nature of work that falls into "strategic advisory services" noted section VI, paragraph A of the RFP document?

   Virginia Tech answer – The needs of the University is to have a stable of contractors to provide Virginia Tech with a wide array of consulting services.

71.   If a vendor does not submit a response to a particular category of work listed in the RFP, does that preclude that vendor from bidding on future task orders / projects in that category of work?

Virginia Tech answer – No.

72.   Should the Addendum #1 for DEIB be incorporated as part of the consolidated response to the RFP vs an addendum or separate submission?

Virginia Tech answer – Please incorporate the DEIB scope of work into your submission.

73.   Which are the requesting departments who would need to articulate their DEIB goals? Can we get a list or an understanding of the number and size of these departments, for pricing.

Virginia Tech answer – The goal is to provide this service to the campus as a whole.

74.   What would be the nature of additional advise and support needed, once DEIB plans are in place?

Virginia Tech answer – The goal is to be able to call upon a stable of firms as needed for a variety of services.

75.   Please expand on what is implied by 'Capacity Building Experience' of the consultant. Is there an expectation for the consulting firm to provide DE&I training as a service?

Virginia Tech answer – Selected contractors may be required to perform DEIB training as requested by departments.

76.   Please describe the scope and work to date regarding DEIB at Virginia Tech beyond what it publicly available on your Inclusion & Diversity and Inclusive Virginia Tech website? Sub questions include:
        a. Is Virginia Tech looking at DEIB across its entire ecosystem – faculty, staff, students, external partners, and vendors?

Virginia Tech answer – The scope of engagements will vary enterprise wide as within each department, and potentially include all of the above.

        b. Global focus (given Beyond Boundaries vision) or North America?

Virginia Tech answer – The focus could be global or unit specific work.

        c. What work has Virginia Tech already done regarding DEIB – for example, recent current state assessment or refreshed strategy?

Virginia Tech answer – Please see these links for DEIB efforts.

77.   Section I of the RFP, "Purpose," on page 3, references Virginia Tech's plan to refresh its strategic plan over the next year. Does Virginia Tech anticipate engaging a consulting firm by means of this RFP to directly support and facilitate the University's strategic planning process over the next year?

Virginia Tech answer – Virginia Tech does not have an expectation of a firm being involved in strategic plan development at the university level.

80.   Section VII.A.7 on page 6 of the RFP indicates that if a business the vendor plans "to subcontract with can be classified as SWaM, but has not been certified by the Virginia Department of Small Business and Supplier Diversity (SBSD), it is expected that the certification process will be initiated no later than the time of the award."
        •   Does "the time of the award" refer to the awarding of a contract for a future specific project from a requesting department at Virginia Tech, does it refer to the selection of vendors in response to this blanket RFP?

Virginia Tech answer – The Contractor shall be SWaM certified when contractor is selected to be awarded a contract, not a future specific project.

82.   With regard to Addendum One:
        a.   Does this scope of work pertain to all staff, faculty and students?

Virginia Tech answer- The Scope of work can be varying by each department.

b.   How does VA Tech define "DEIB"?

Virginia Tech answer - Diversity: The visible and invisible characteristics and experiences that make people different. Everyone is diverse. Equity: Identifying and addressing imbalances and barriers that inhibit group and individual full engagement and success. Inclusion: The act of ensuring all groups and individuals have equitable access to resources and opportunities. Developing an understanding of unique needs and challenges are critical. Belonging: The nexus of diversity, equity and inclusion where all groups and individuals feel welcomed, valued, and are empowered to be active members in the community.

d.   Does VA Tech have a current DEIB strategy in place, and has the university done any surveys or fact-finding on DEIB previously?

Virginia Tech answer – Virginia Tech has a strategy in place; however, Virginia Tech is always looking to approve our DEIB commitment. This is why we are looking for a stable of contractors that provide these services.

e.   What, existing DEIB data does the University hold? E.g., is there an existing HR census with demographic data.

Virginia Tech answer – Procurement does not have access to this information and releasing it would require the University legal involvement.

83.   If there are any parts of this RFP that a vendor cannot support, can the vendor still respond to the proposal?

Virginia Tech answer – Yes.

84.   The guidelines state "identify all costs associated, broken down by activity, with providing services." To what level of detail should these activities and costs be broken down in the proposal?

Virginia Tech answer - Virginia Tech encourages proposers to be as detailed as possible by the types of services your organization provides. For example, if you have consulting labor costs by hour and title/role we would anticipate seeing this detail.

85.   Should this addendum be interpreted as an extension of the RFP scope or a task order?

Virginia Tech answer – Addendum number one was included to be an addition to the scope of work in the original RFP.

88.   RFP section VII.A.2 requests that "vendor must provide curriculum vitae, resume or capabilities statement for all personnel that may be assigned to the university; this should include relevant experience and certifications". Can Virginia Tech confirm that is it acceptable for vendors to provide curriculum vitae, resume or capabilities statement for all personnel within an appendix section?

Virginia Tech answer – Virginia Tech cannot tell you how to structure your proposal.

89.   Can Virginia Tech make the following revisions in quotations to Section 12 (Default) in the RFP Terms and Conditions? "In case of failure to deliver goods or services in accordance with the contract terms and conditions, Virginia Tech, after due oral or written notice and offering the Contractor a minimum of seven (7) business days to cure such failure, may procure them from other sources and hold the Contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which Virginia Tech may have."

The Contractor feels it fair and reasonable to establish a defined minimum cure period to correct any failures in the unlikely event of contract default. In doing so, cure periods have historically promoted economic efficiency by leveraging the resources already mobilized on the engagement that possess the historical knowledge and understanding to cure any
deficiencies more quickly and efficiently.

Virginia Tech answer – Any revisions to Virginia Tech's terms and conditions will result in a legal review.
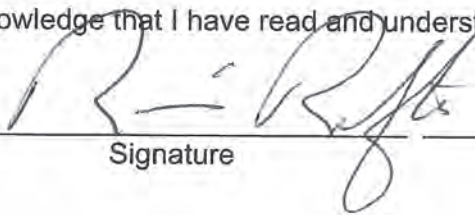
90.   Can Virginia Tech make the following revisions in quotations to Section 19 (Indemnification) in the RFP Terms and Conditions? "Contractor agrees to indemnify, defend and hold harmless Virginia Tech and the Commonwealth of

Virginia and their officers, agents, and employees (the "Indemnitees") from any third-party claims, damages and actions of any kind or nature whether at law or in equity, arising from or caused by the ~~use of any materials, goods, or equipment of any kind or nature, furnished by the~~ contractor's negligent performance of this contract/~~any services of any kind or nature furnished by the contractor~~, provided that such liability is not attributable to the sole negligence of Virginia Tech ~~or failure of Virginia Tech to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered~~. Except for the Contractor's gross negligence or willful misconduct, the Contractor's liability to the Indemnitees related to this contract is limited to no more than the total amount of fees paid to the contractor by Virginia Tech under this contract. Neither party will be liable for any lost profits or other indirect, consequential, incidental, punitive or special damages."

Virginia Tech answer – Any revisions to Virginia Tech's terms and conditions will result in a legal review.

91.   All other terms, conditions and descriptions remain the same.

92.   The due date and hour is changed from April 20, 2023 at 3 pm TO **April 26, 2023 at 3 pm.**

I acknowledge that I have read and understand this addendum in its entirety.

_____   20 Apm 2023
        Signature   Date

Revised 10/19/21

GARNETT C. ATTIPOE

PowerBI, Tableau Developer, SAFe Scrum Agilist

garnettattipoe@bacteam.com

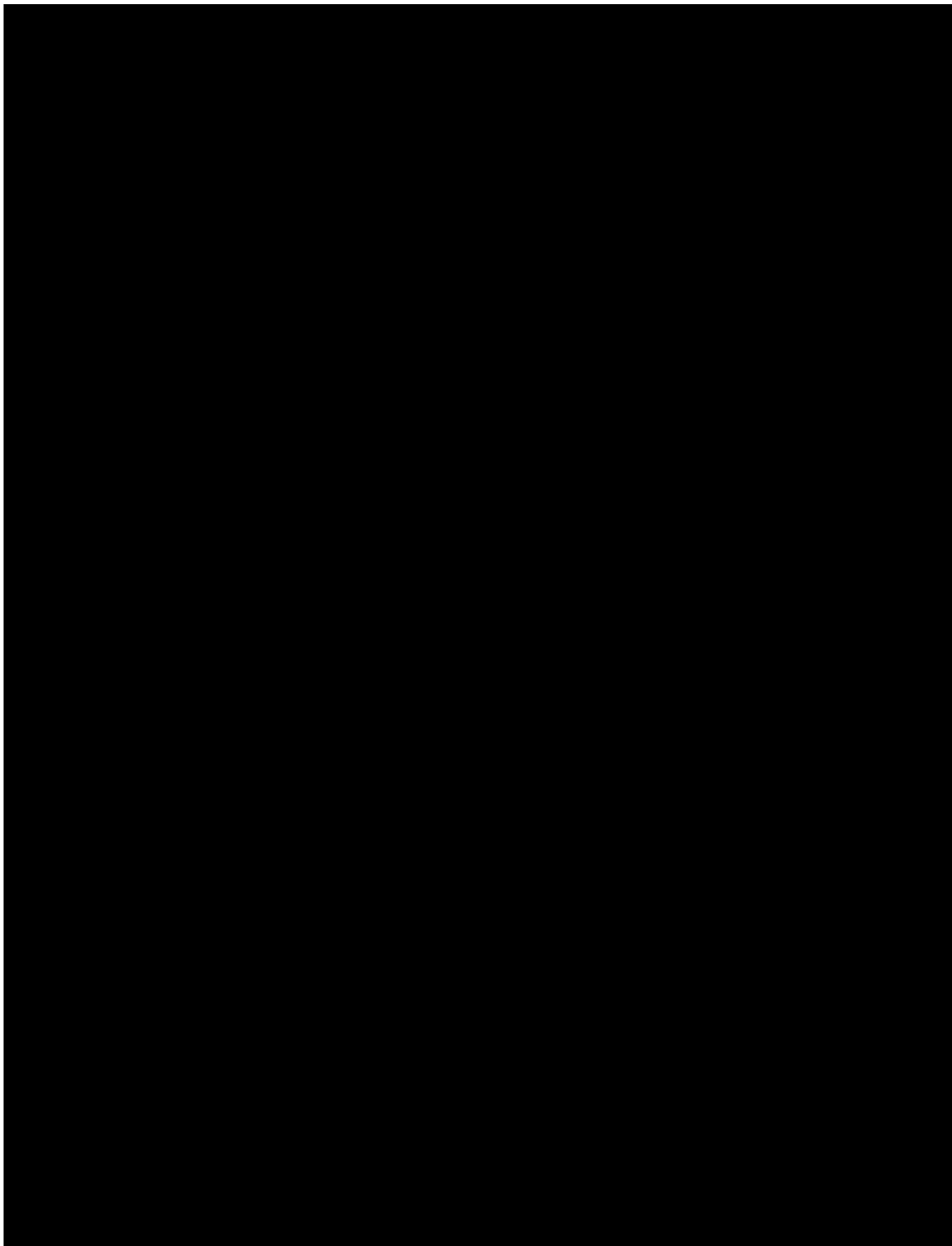## PROFILE

EXPERTISE

Data Management

Business Analytics

Operations Management

Data Visualization

Data Reporting

Power BI, Tableau, and SharePoint

GARNETT C. ATTIPOE

PowerBI, Tableau Developer, SAFe Scrum Agilist

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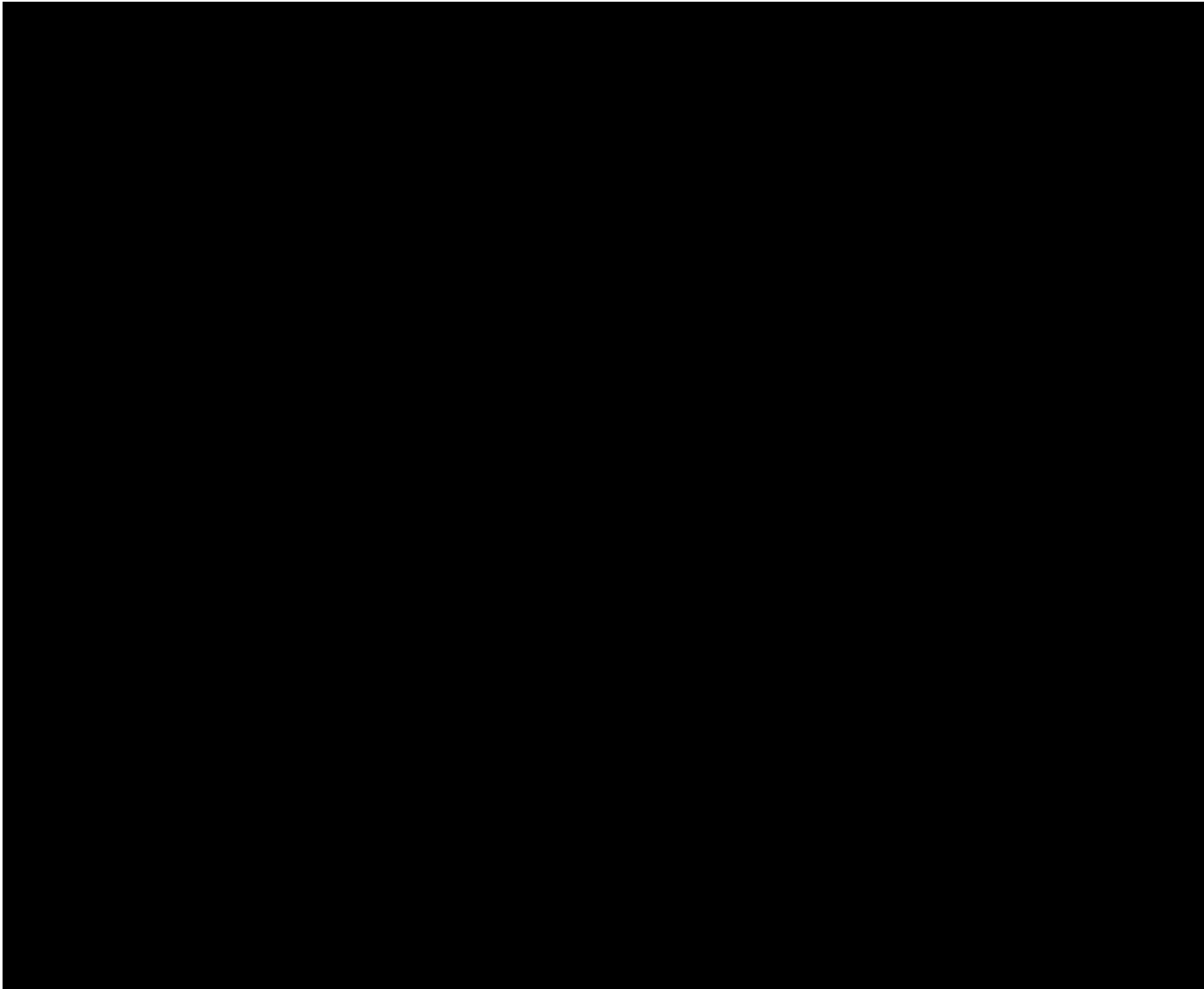
MCKENZE BOWENS, BS
IT Manager

info@bacteam.com|

EXPERTISE

IT Manager

IT Test & Evaluation

IT Strategic Planning

IT Mentoring, Coaching

IT Training & Education
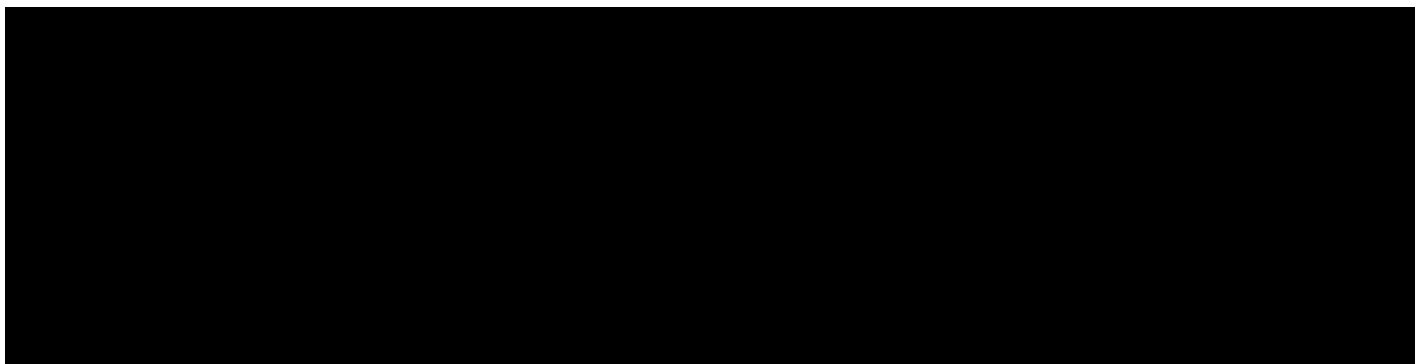
JOSEPH L. BUI
Management Consultant BA, MPA, PMP   josephbui@bacteam.com|
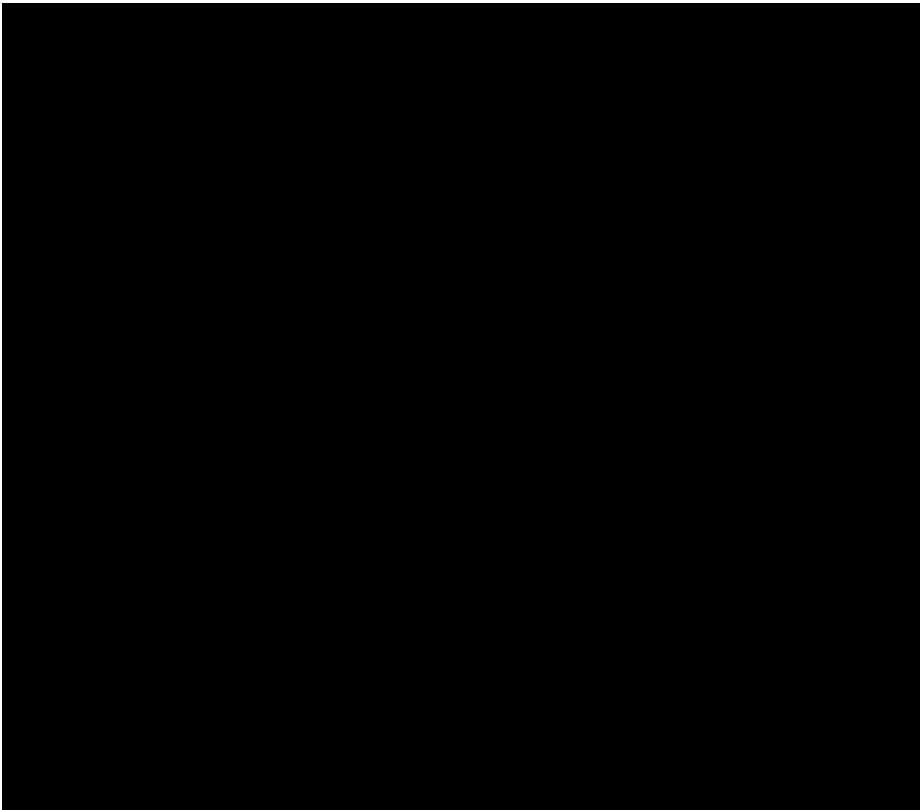
EXPERTISE

Program Manager

Project Management Professional (PMP)

Change Management

Strategic Planning

Supervision, Mentoring, Coaching

Training & Education

Stakeholder Engagement Coordination, Facilitation

Performance Measurement and Data Analytics

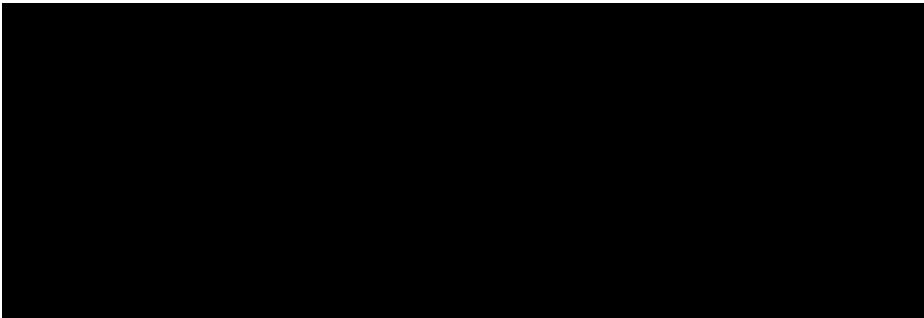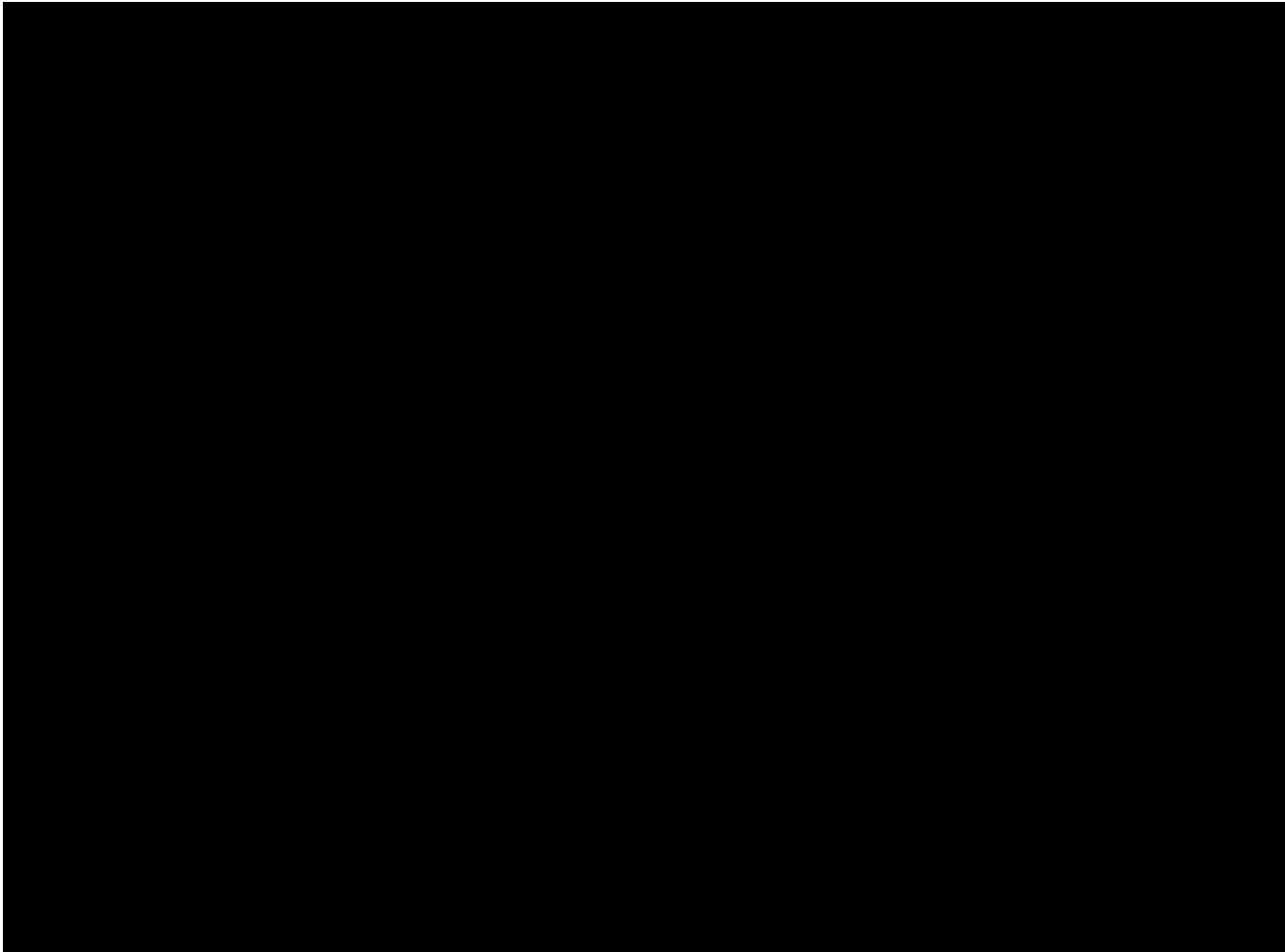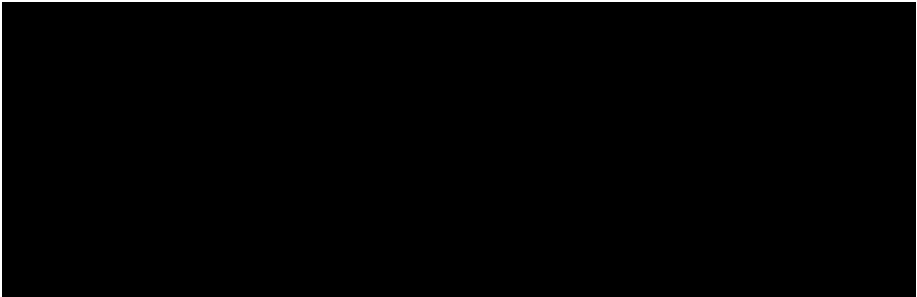## JOSEPH L. BUI
Management Consultant BA, MPA, PMP
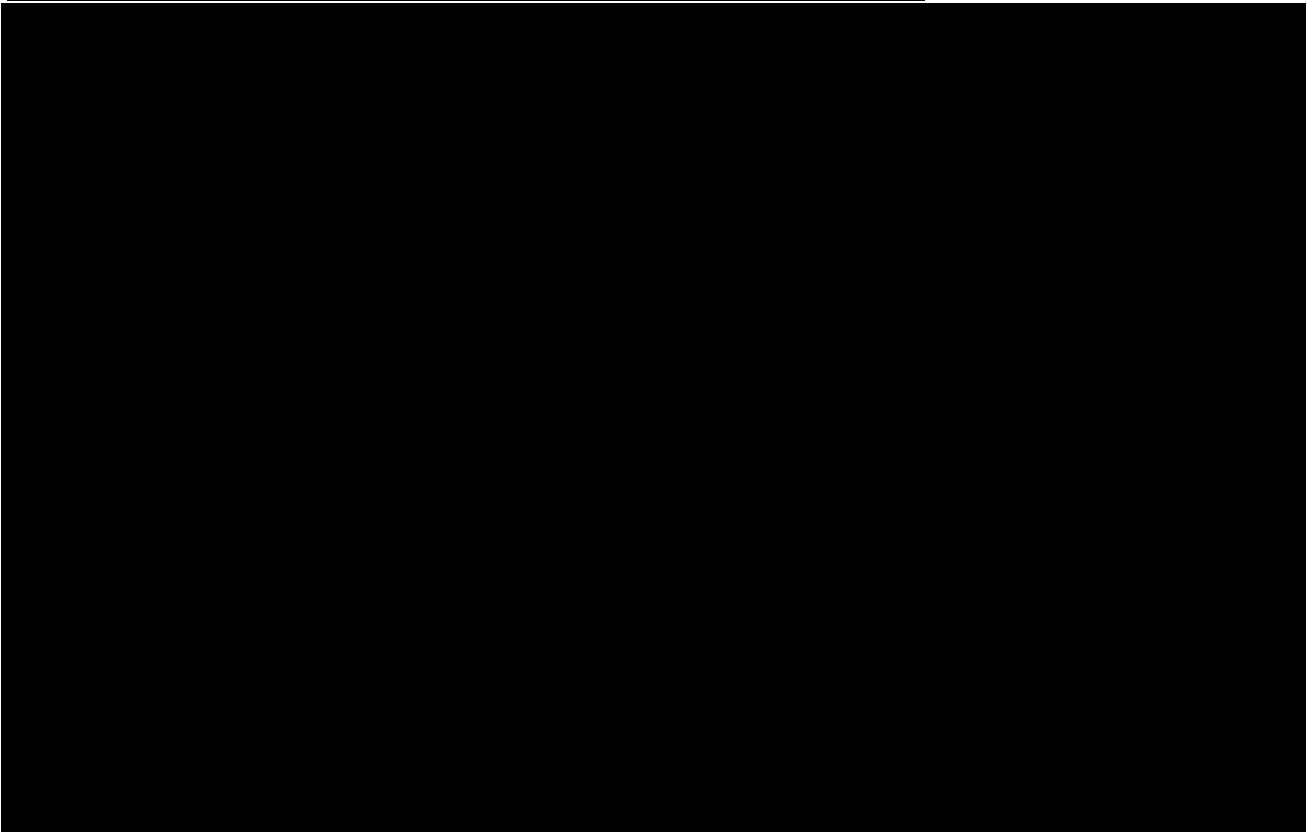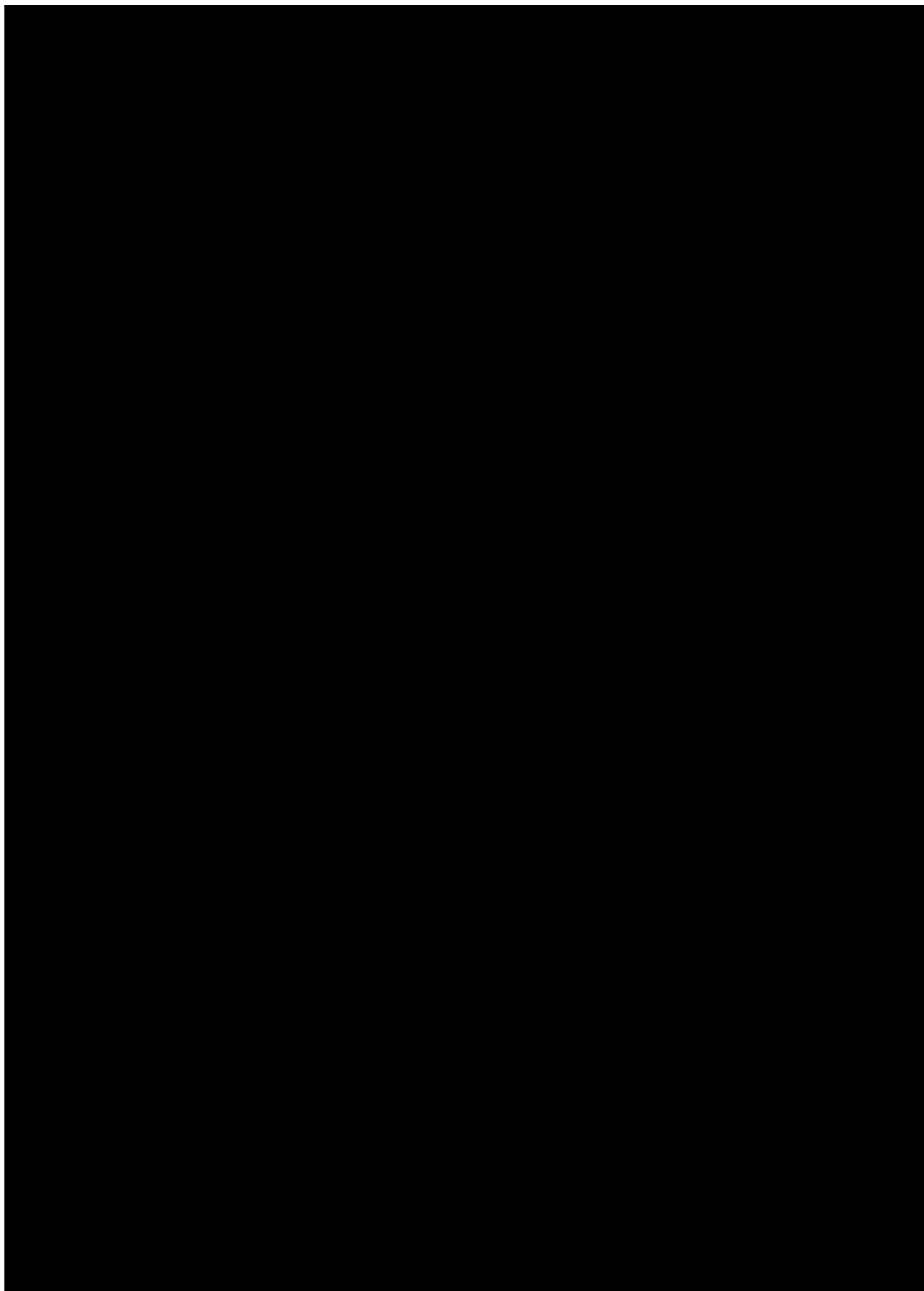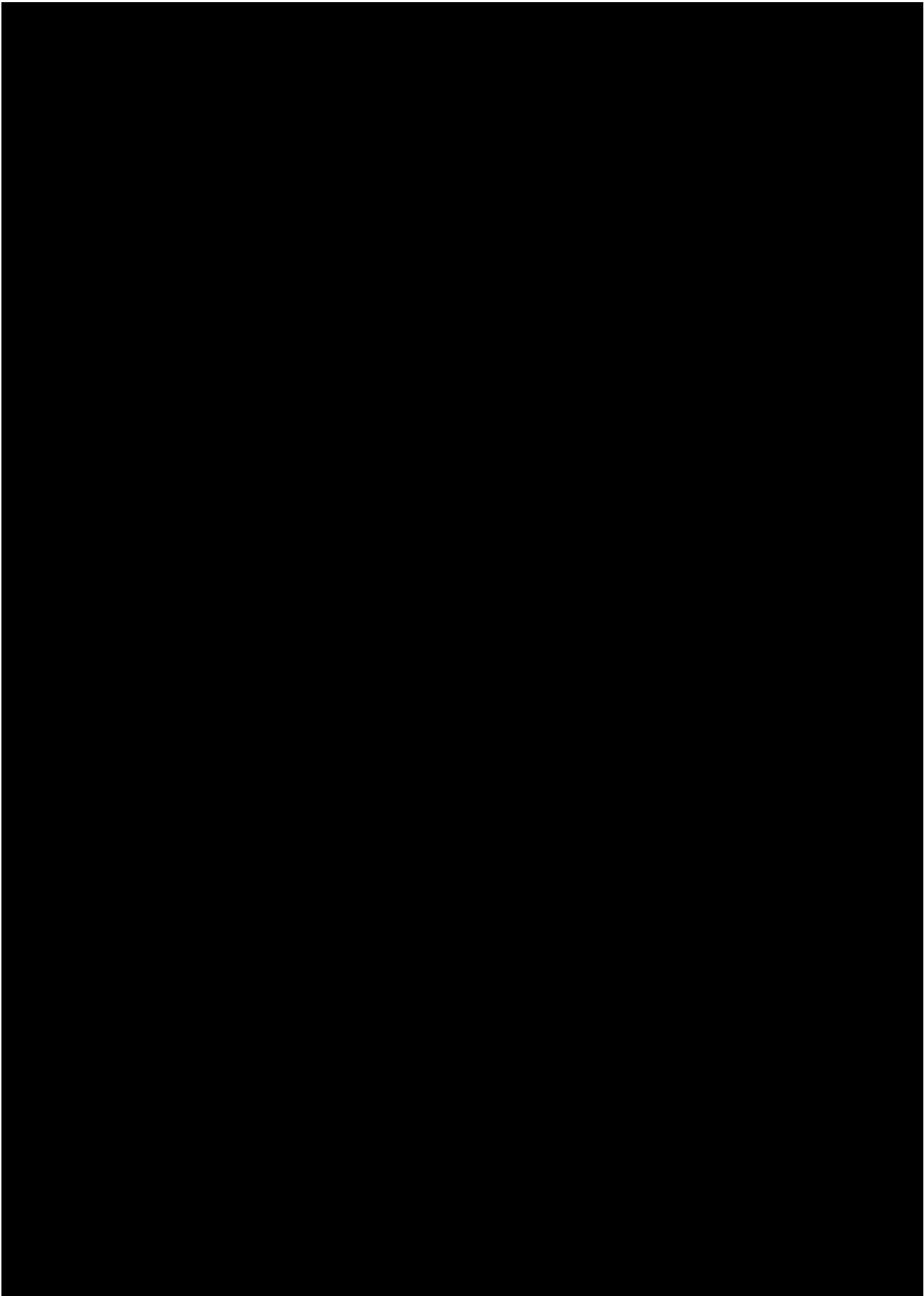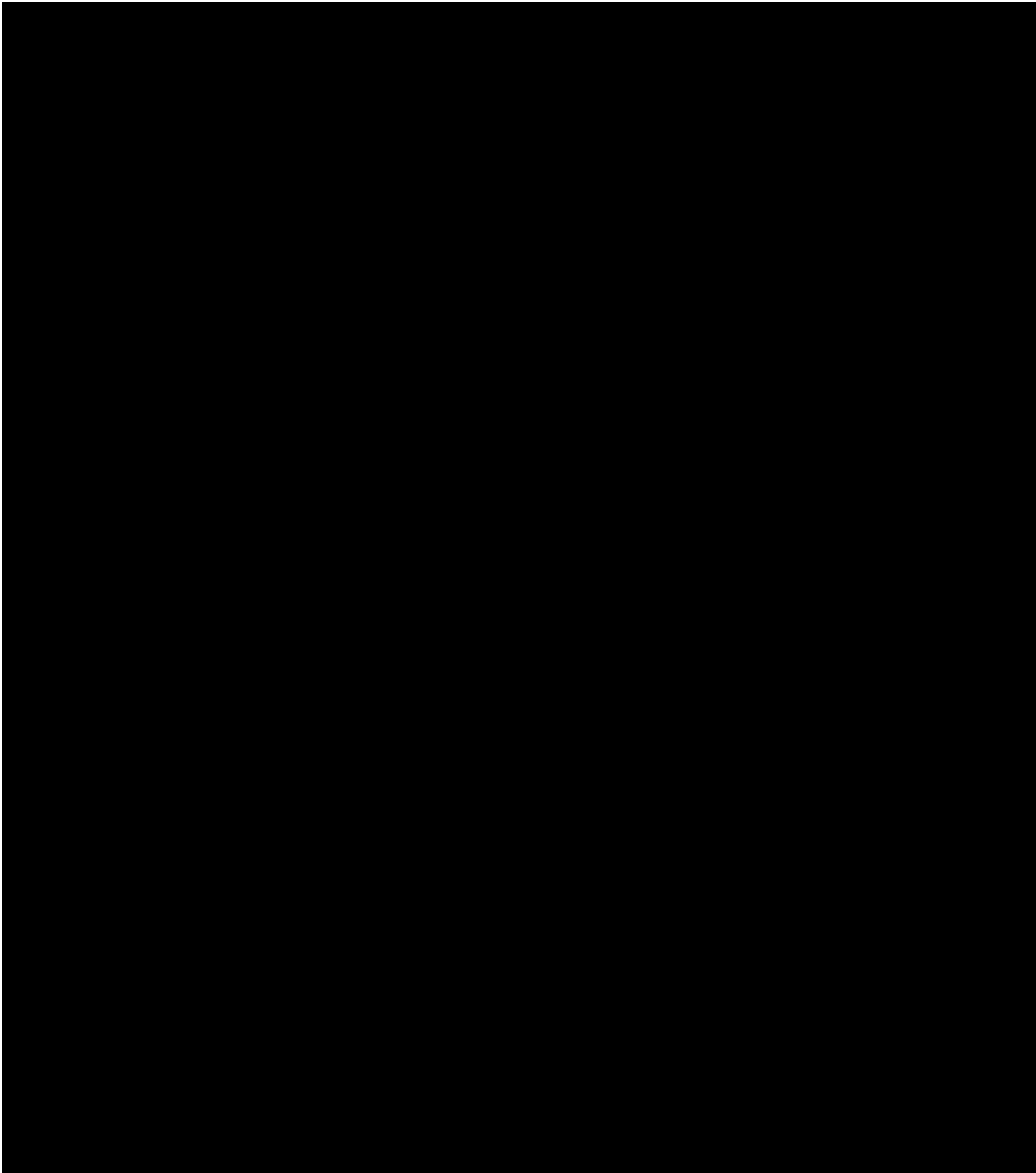
DAVID CLARKE
Senior Human Factors Specialist BS, MA, PhD   davidclarke@bacteam.com|

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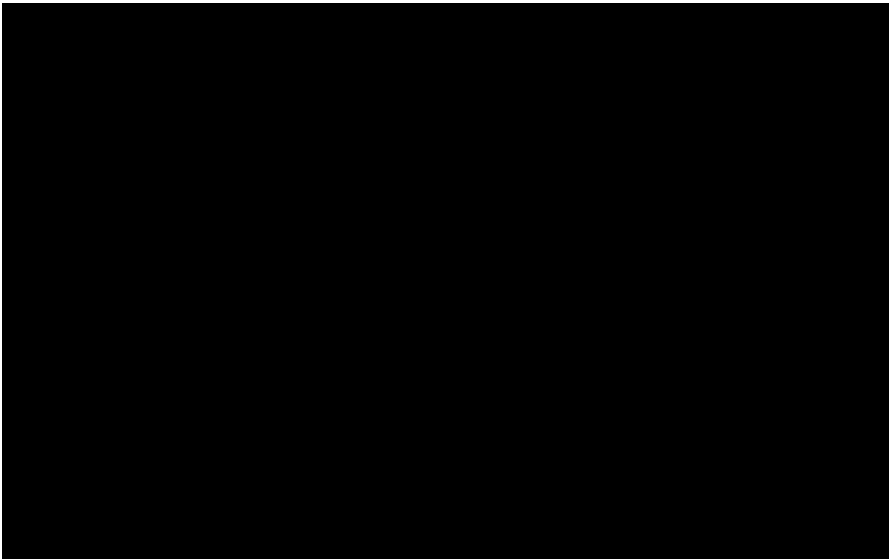
Project Manager

Human Performance & Perception

Experimental Design

Data Analysis

Research Methods

Risk Assessment

Heuristic Reviews

UX Design

Agile Development

DAVID CLARKE
Senior Human Factors Specialist BS, MA, PhD

DEE CLAXTON, PMP

deeclaxton@bacteam.com|

EXPERTISE

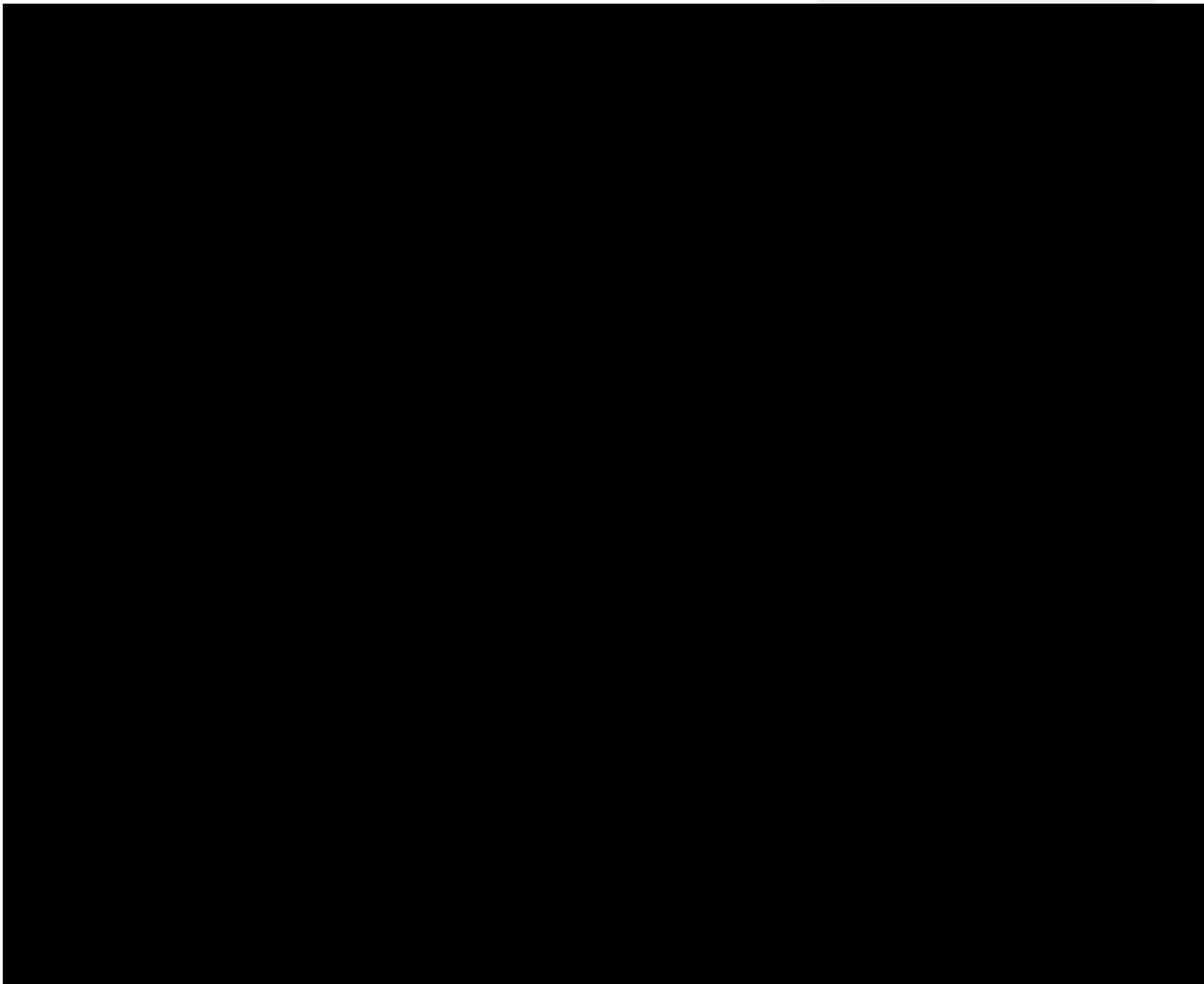Program Management & Development

Project/Product Management

Business Strategy

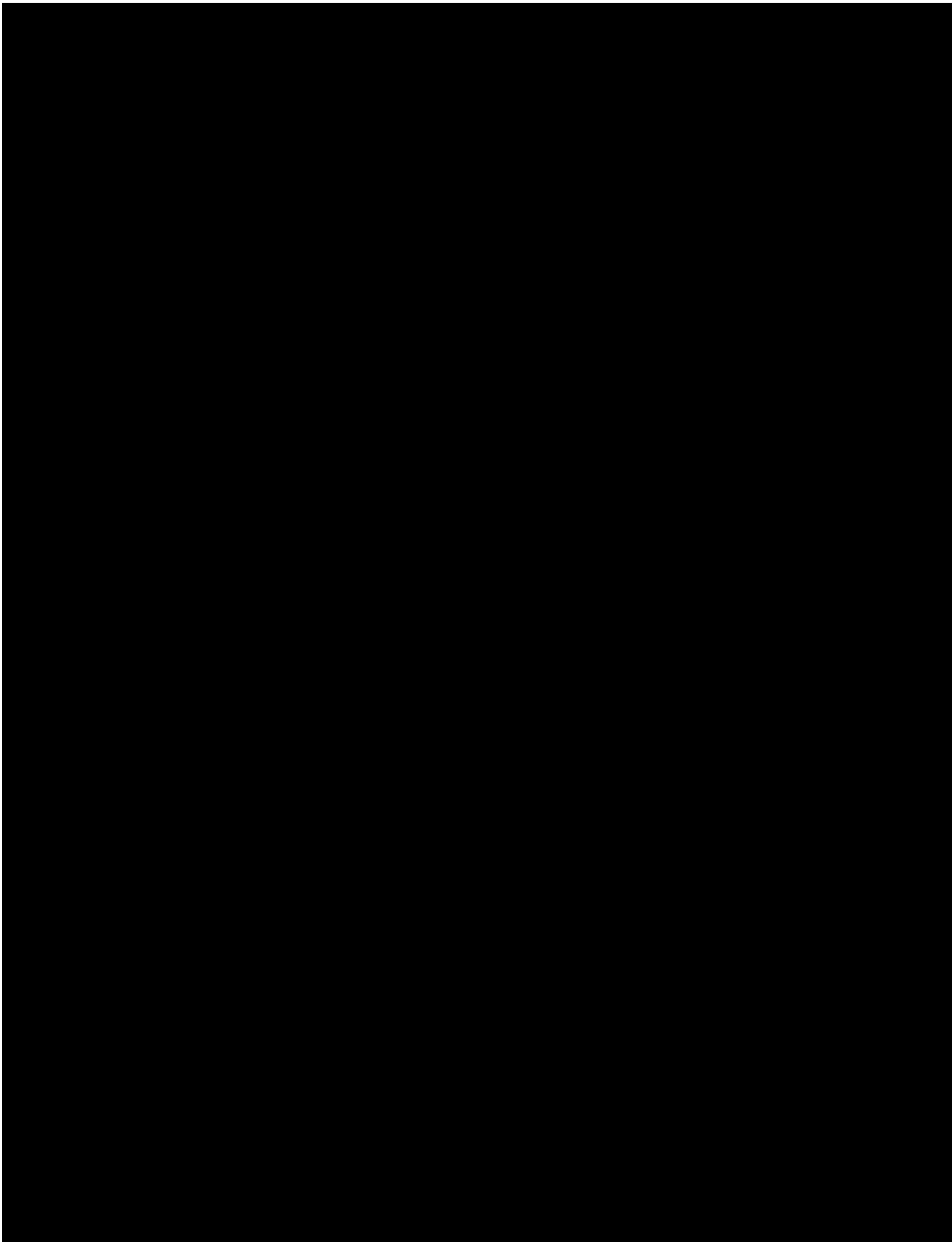Business Process Engineering

Risk Management

Systems Modernization

Training Programs Mgmt
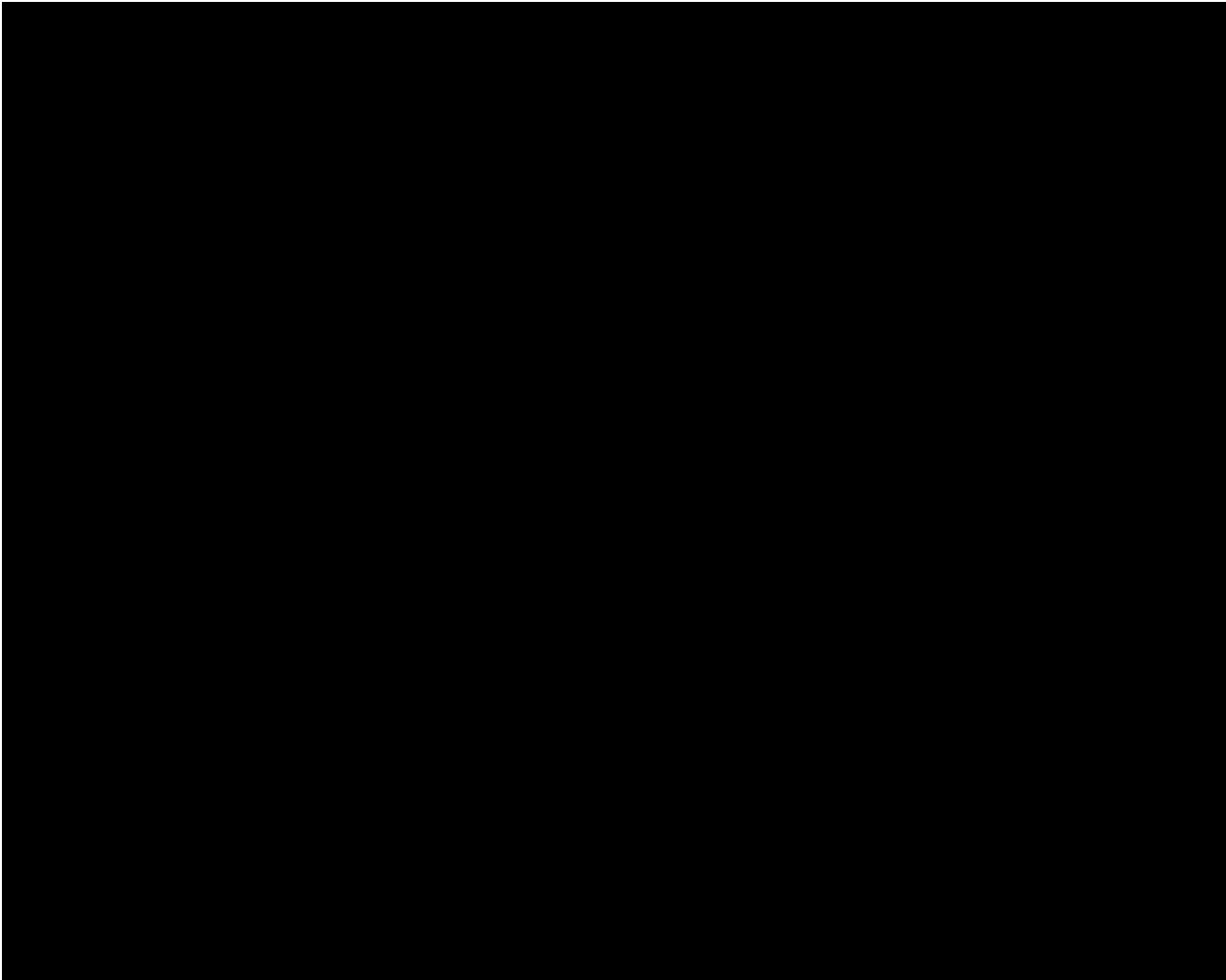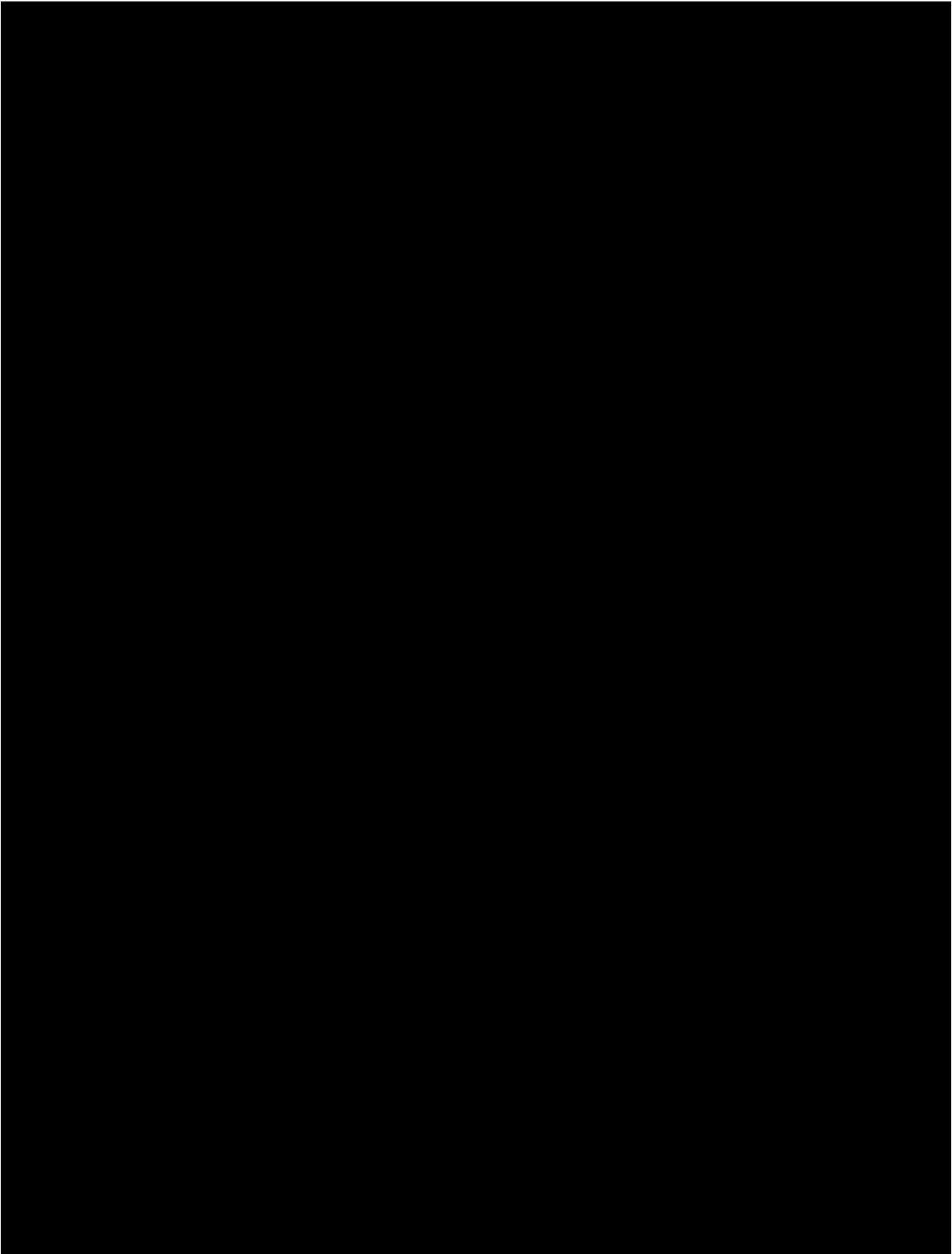
DEE CLAXTON, PMP

KARLA FLOOD, PMP

Project Management & Operations Management Expert, BS

karlaflood@bacteam.com ███████████

EXPERTISE

Project Management

Strategic Communications

Cost & Risk Management

Project Coordination

Business Operations

KARLA FLOOD, PMP

Project Management & Operations Management Expert, BS
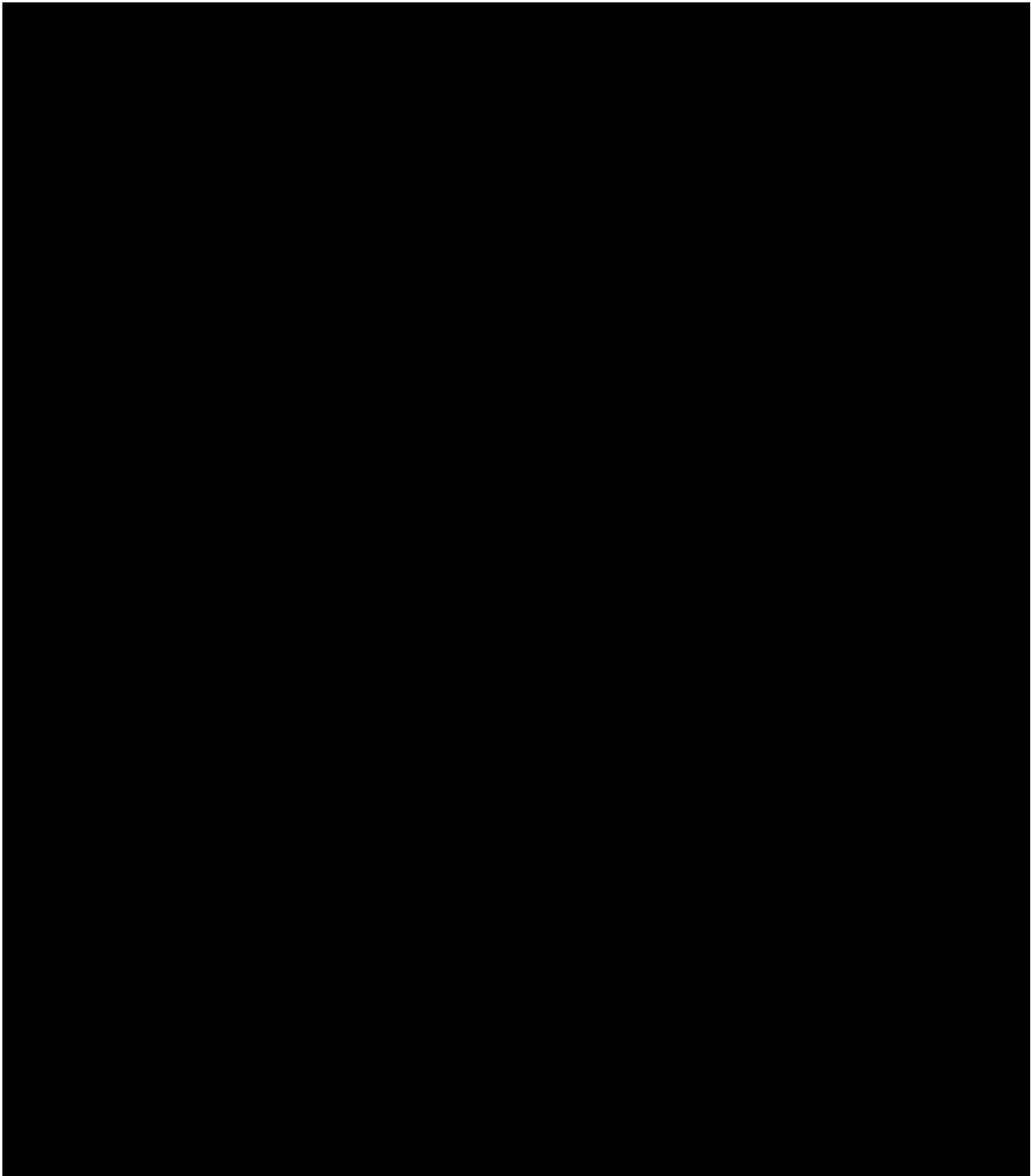
MOLLY MANION, MSN, RN-BC, CPHIMS

mollymanion@bacteam.com

EXPERTISE

Clinical Nursing: Staff and Supervisory

Clinical Informatics

Educational and Technical Project Leadership

Instructional design and delivery of in-person and online learning programs

MOLLY MANION, MSN, RN-BC, CPHIMS

OCTAVIO SAMAYOA LSSMBB

LSSMBBHealth Care Program Mgr. BA, MA, JD   octabivosamayoa@bacteam.com

EXPERTISE

LSS Master Black Belt

Mentoring, Coaching

Training & Education

Stakeholder Engagement

RIXON RAFTER
Health Care Program Mgr. BA, MA, JD   rixonrafter@bacteam.com|
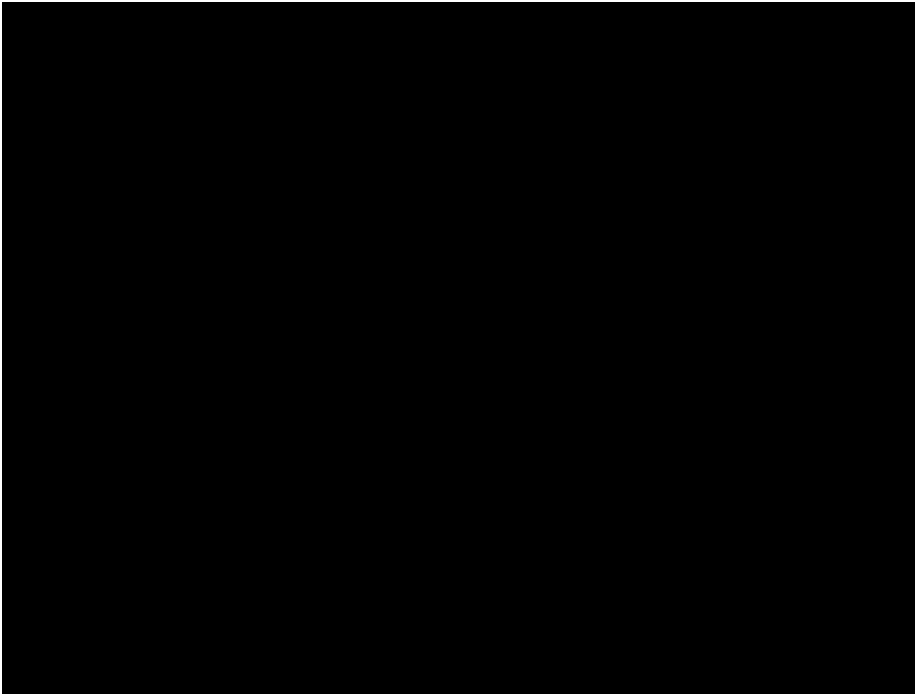
EXPERTISE

Program Manager

Change Management

Strategic Planning

Mentoring, Coaching

Training & Education

VHA Health Care and
Informatics Consultant

Stakeholder
Engagement
Coordination, Facilitation

VHA Requirements
Elicitation, Development
and Management

Ben Allegretti Consulting, Inc.
Response to VT Negotiation
Questions (06192023)

Negotiation Questions

1. As part of Virginia Tech standard procedures, all awarded contracts will be publicly posted on an online contracts portal. Is there any information included that would be used to identify or harm a person's identity, finances or personal information? If so, please provide a redacted copy of your proposal.
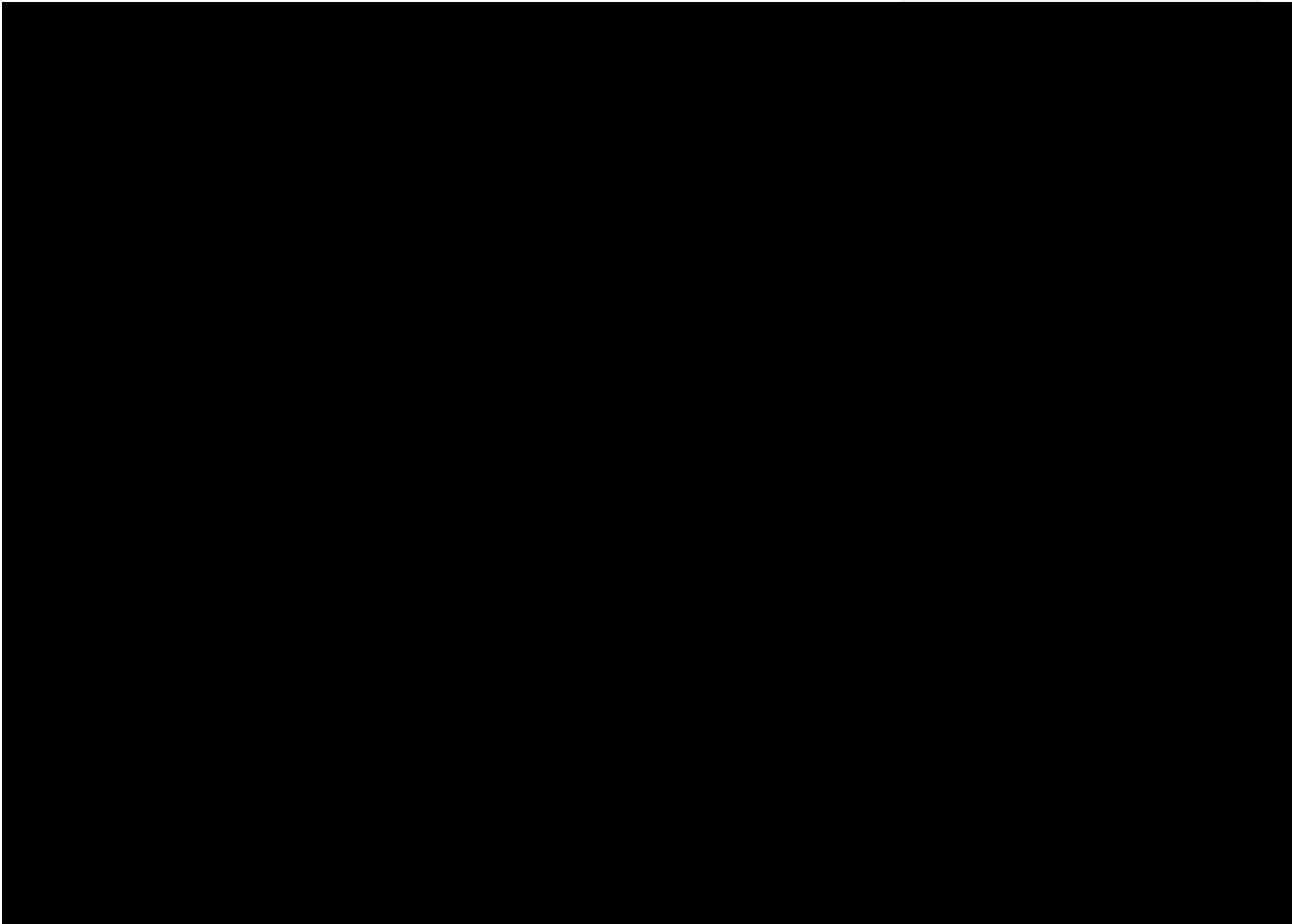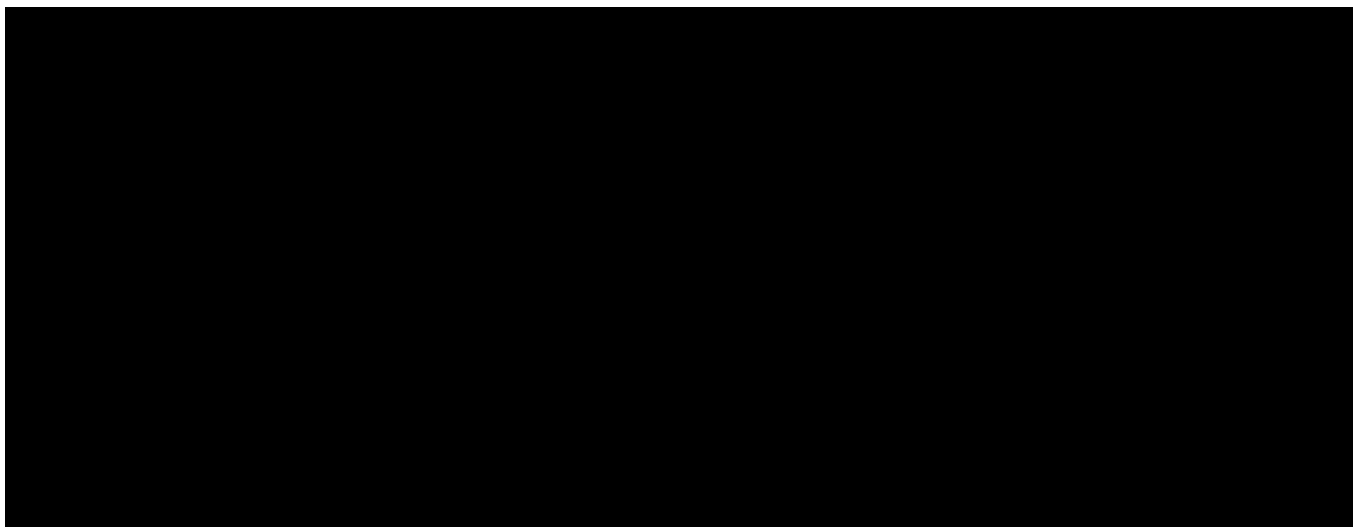
   Ben Allegretti Consulting response – BAC's Tech and Cost proposals do not contain information that would identify or harm a person's identity, finances, or personal information.

2. Are there any additional forms or documents that you will require to be incorporated into the contract documents? If so, please submit.

   Ben Allegretti Consulting response – No.

3. Does your company agree to provide monthly invoices with payment due thirty (30) days after receipt of invoice or goods/services, whichever is later?

   Ben Allegretti Consulting response – Yes

4. Do you agree that you will be performing services as an Independent Contractor, Company, Corporation or other business entity and are not an employee of Virginia Tech or any other Commonwealth Entity?

   Ben Allegretti Consulting response – Yes

5. Do you further agree that Virginia Tech will not withhold any income taxes from its payments to contractors nor will it provide any employment benefits to the contractor or contractor's employees?

   Ben Allegretti Consulting response – Yes.

6. Please describe your quickest turn-around time from the delivery of scope of work to the beginning of the start of work.

   Ben Allegretti Consulting response – BAC anticipates and expects to begin work Immediately upon receipt of scope of work delivery. Pre-planning, internal BAC kick off meetings would begin in less than one day. Consultations with VT procurement, project associated VT staff should would begin as soon as possible since the nature and scope the tasking determine turn-around times; matters that are simple can be responded to quickly, without delay. More complex scope of work requirements may require substantial upfront planning, direct communication, and stakeholder engagement just to outline the approach and may take longer as warranted by the best interests of VT.

7. Do you agree that all information obtained and provided will be property of Virginia Tech if or when a transition of service to another provider is required?

   Ben Allegretti Consulting response –Yes.

8. Do you agree that the initial contract period shall be two years?

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Response to VT Negotiation
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Ben Allegretti Consulting response – Yes.

9. Upon completion of the initial contract period, does your company agree that the contract may be renewed by Virginia Tech upon written agreement of both parties for three (3) two-year periods, under the terms of the current contact?

Ben Allegretti Consulting response – Yes.

10. If awarded a contract, do you agree to limit price increases to no more than the increase in the Consumer Price Index, CPI-W, services category for the latest twelve (12) months for which statistics are available at the time of renewal or 3 percent, whichever is less?

Ben Allegretti Consulting response – Yes.

11. If awarded a contract, are you willing to hold prices firm for the initial contract period and the first year?

Ben Allegretti Consulting response – Yes.

12. Please identify the highest-level executive in your organization that is aware of this solicitation. Describe that person's commitment to assuring the highest quality service to Virginia Tech if your organization is awarded a contract.

Ben Allegretti Consulting response – Ben Allegretti (President BAC) is the highest level executive aware of the VT solicitation. BAC's President will have direct and daily interaction with the BAC team for any work performed under this contract. Our commitment to assuring the highest level of support for VT is evidenced in our creation of a PM-to-President (P2P) direct communication process; daily SCRUM sessions our PM and VT SME team perform; and continual feedback scheduling with VT customers and stakeholders throughout the period of support.

13. Are you willing to contact departments on a monthly basis to address service issues? If so, how can your company ensure customer service will be at its highest?

Ben Allegretti Consulting response – Yes. will employ an active Quality Assurance (QA) process (see graphic below) along with daily and weekly communications between PM and client lead as well as perform monthly check-in between BAC exec management and client leadership to ensure continuous and open communications are kept and any issues are at once identified and addressed.

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- Perform data quality assurance with VT customer leads to verify accurate representation of the delivered project work
- Analyze and parse source data for applicability by BAC SME's to execute an initial data scrub to eliminate duplicity, gathering errors, outliers.
- Ensure any existing systems remain operable amid testing or improvements or legacy system project innovations
- Verify with VT leads and managers and end users to ensure that changes to any VT systems or processes are intact and stable
- Validate output and accurate of data from end-user perspective with VT managers and VT stakeholders.
- Prepare process or policy drafts for VT review to promote acceptance and support from stakeholders.
- Provide updates to VT information depository as needed for use by appropriate VT Teams
- Provide a document describing each PMO Project update

14. Will you be able to handle increased volumes of business and/or provide service to multiple departments and remain on a reasonable timeline for each project during the course of the contract?

   Ben Allegretti Consulting response – Absolutely. BAC is organized and structured to allow scaling of BAC staff and resources to meet multiple simultaneous requirements.

15. Please provide your best and final price structure?

   Ben Allegretti Consulting response – Ben Allegretti Consulting has made discounts to a number of labor categories and are providing an updated best and final price structure along with this document. Additionally, depending upon the requirements of the tasks released under the IDIQ, we may be able to provide additional discounts.

16. How soon after contract award can you begin providing services?

   Ben Allegretti Consulting response – Immediately.

17. Are you registered with and willing to participate in the eVA internet procurement solution described in the terms and conditions of the RFP?

   Ben Allegretti Consulting response –Yes

18. Do you acknowledge, agree and understand that Virginia Tech cannot guarantee a minimum amount of business if a contract is awarded to your company?

   Ben Allegretti Consulting response –Yes

19. Are the prices for all goods/services listed in your proposal inclusive of all applicable eVA system transaction fees?

Ben Allegretti Consulting response – Yes.

20. Does the vendor acknowledge, agree, and understand that the terms and conditions of the RFP # 5671412306 shall govern the contract if a contract is awarded to your company?

Ben Allegretti Consulting response – Yes.

21. Can your company become a certified SWaM (Small, Women Owned and Minority) vendor with the Virginia Department of Small Business and Supplier Diversity and maintain that certification throughout the term of this contract?

Ben Allegretti Consulting response – Yes.

22. In the event you may need to subcontract a proportion of the work out to another vendor, do you agree to utilize to the fullest extent possible a SWaM certified vendor?

Ben Allegretti Consulting response – Yes

23. Do you agree that all requests for travel reimbursement shall be at the established GSA Travel rates for the appropriate location?

Ben Allegretti Consulting response - Yes

BAC Updated Pricing with Newly Discounted Rates for VT for Negotiation Phase

Labor Category	Functions	Degree Requirement	Years of Experience	Proposed Hourly Rate	Newly Discounted Rate
Administrative Assistant, Junior	Prepares reports and other program documentation, prepares graphics presentations, plans and coordinates meetings/conferences, performs data entry, filing, and reproduction. Applies familiarity with specialized and technical terminology to proofread and edit documents	HS Diploma/BA	3 years	$46.88	
Administrative Assistant, Senior			8 years	$55.19	
Business Architect	Performs tasks which structure the enterprise in terms of its governance structure, business processes, and business information; align strategic goals and objectives with decisions regarding products and services, partners and suppliers, organization, capabilities, and key business and IT initiatives. Tasks may include developing a business architecture strategy based on a situational awareness of various business scenarios and motivations; applying a structured business architecture approach and methodology for capturing the key views of the enterprise; capturing the tactical and strategic enterprise goals that provide traceability through the organization and are mapped to metrics that provide ongoing governance; defining the set of strategic, core and support processes that transcend functional and organizational boundaries; identifying external entities such as customers, suppliers, and external systems that interact with the business and describing which people, resources and controls are involved in the processes; and capturing the relationships among roles, capabilities and business units, the decomposition of those business units into subunits, and the internal or external management of those units.	BA/BS degree	4 years	$116.48	
Business Process Engineer	Performs management and support of the analysis, design, development, and implementation of diverse, enterprise-wide processes and application systems. Tasks may include the design study process; conducting studies in support of system redesign and business process reengineering, improvement and management; developing implementation plans; and supporting the process of implementing and sustaining improvements.	BA/BS degree	5 years	$91.69	
Business Process Expert	Researches, analyzes, and recommends changes to an organization's business processes to improve operational efficiencies, quality, service, and profitability. Agile/SCRUM, LSS experience and/or certifications.	BA/BS	8 years	$169.37	$165.14

Role	Description	Education	Experience	Rate	Rate
Change Management Specialist	Performs tasks requiring the knowledge and skills for a multidisciplinary approach to managing change and transition within organizations, programs, and projects. Tasks may include developing plans associated with transition management, implementation of major initiatives, communications associated with major initiatives, risk assessment, and organizational transformation and culture change; completing change management assessments and change management strategy; identifying and managing anticipated resistance; creating actionable deliverables, such as a communication plan, roadmap, coaching plan, training plan, or resistance management plan; supporting and engaging senior leaders; supporting organizational design and definition of roles and responsibilities; integrating change management activities into project plan, and evaluating and ensuring user readiness; managing stakeholders; tracking and reporting issues; defining and measuring success metrics and monitoring change progress.	BA/BS degree	3 years	$98.88	
Communications Products Specialist, Junior	Communications or public relations specialists may handle public relations, information output, press releases and media requests, social media and/or advertising for a wide variety of organizations	BA/BS degree	Junior: 4 years	$66.48	
Communications Products Specialist, Senior			Senior: 8 years	$169.69	$165.45
IT/Data Analyst, Junior	Performs tasks which may include obtaining data through advanced computerized models; extrapolating data patterns through advanced algorithms; developing simple graphs and charts to explain how the mathematical information will influence the specific project or business; and presenting to managers how to best alter their business models to generate profitable future trends.	BA/BS degree	Junior: 3 years	$64.48	
IT/Data Analyst, Senior			Senior: 8 years	$169.71	
Data Management Specialist, Junior	Performs tasks which ensure strategic and coordinated data systems management, accuracy and integrity of data, and reporting of data to internal and external stakeholders. Tasks may include ensuring timely and accurate monthly, quarterly and annual reports as required; establishing, maintaining, and updating databases and records for recurring internal reports; recommending and implementing new operating methods to improve data flow, collection, editing, processing and distribution; and ensuring data integrity of high level data analysis.	BA/BS degree	Junior: 3 years	$62.04	
Data Management Specialist, Senior			Senior: 8 years	$169.18	

Role	Description	Degree	Experience	Rate
Editor	Performs tasks such as writing and editing materials, such as reports, regulations, articles, newsletters, magazines, news releases, training materials, brochures, interpretive handbooks, pamphlets, guidebooks, scholarly works, reference works, speeches, or scripts. Tasks may include writing, editing, or reviewing training materials for a course, user guidebook, briefing packages, workbooks, or study reports.	BA/BS degree	4 years	$73.10
Evaluation Specialist, Junior	Designs and implements evaluation systems, measuring program impact and activities and is skilled in content analysis, quantitative tracking, and qualitative assessment. Uses tools such as surveys, focus groups, structured interviews, and	BA/BS	Junior: 5 years	$51.27
Evaluation Specialist, Senior	secondary research. Oversees performance report generation and communication and integration of findings into current strategies. Meets with VT regularly to discuss progress, propose		Senior: 8 years	$159.28
Executive Career Coach	Performs tasks which allow a partnership with executive clients in a thought-provoking and creative process that inspires them to maximize their professional potential. Tasks may include supporting clients through their career transition, expertly coaching clients on their job search strategy and providing them services including mock interviews, interview preparation, evaluation and salary negotiation coaching, information on networking best practices and other support as requested.	Masters	10 years	$169.88
Facilitator	Performs tasks such as defining, refining, and resolving disputes, disagreements, and divergent views; leading or facilitating group briefings and discussions; enabling focused decision-making; recording discussion content; related facilitation support services, such as debriefing stakeholders, and preparing and providing draft and final reports relating to the facilitated issues. Tasks may include facilitating meetings or training classes raining from a day to a few weeks.	BA/BS degree	3 years	$75.43
Humans Factor Engineer, Junior	The scientific discipline concerned with the understanding of interactions among humans and other elements of a system, and the profession that applies theory, principles, data and methods to design in order to optimize human well-being and overall	BS Degree	4 years	$78.80
Human Factors Engineer, Mid	system performance. Ergonomists contribute to the design and evaluation of tasks, jobs, products, environments and systems in	BS/MS Degree	6 years	$150.28
Human Factors Engineer, Senior	order to make them compatible with the needs, abilities and limitations of people	PhD or similar Degree	10 years	$220.86	$215.33

Information Management Specialist	Performs tasks which support program, project and organizational work through the design and control of systems that input, delete, retrieve, manipulate, and correct information in databases or automated/electronic records. Tasks may include designing and producing reports via a wide variety of information management research tools, systems, and processes.	BA/BS degree	4 years	$76.60
Information Technology Specialist	Performs tasks related to leading, administering, developing, delivering, and supporting information technology (IT) systems and services, including data storage, information assurance, software applications, networking, and systems and services used in the automated acquisition, storage, manipulation, management, movement, control, display, switching, interchange, transmission, assurance, or reception of	BA/BS degree	4 years	$75.23
Instructional System Designer, Junior	Performs tasks related to planning, coordination, and development components of instructional design based on the findings of occupational analysis; determining the learning objectives and task learning relationships, clustering learning events, organizing course content, and developing instruction design plans; and analyzing learning problems, selecting teaching strategies using appropriate models, and developing course plans using this information. Tasks may include identifying training needs, presenting recommendations, and delivering learning solutions to address performance gaps;		Junior: 3 years	$95.75
Instructional System Designer, Senior	leveraging instructional design and performance improvement processes to analyze, design, develop, implement, and evaluate instructional materials and performance improvement programs; working with key stakeholders and subject matter experts to design and develop training interventions that incorporate best practices in behavioral and cognitive sciences to effectively address business and performance objectives.	BA/BS degree	Senior: 8 years	$166.65	$162.48

Labor Category	Description	Education	Experience		
Lean Six Sigma Specialist	Performs tasks which require knowledge of Six Sigma philosophies and principles, including supporting systems and tools; an understanding of team dynamics and how to assign team member roles and responsibilities based on a thorough understanding of all aspects of the DMAIC model in accordance with Six Sigma principles; and Lean enterprise concepts, with the ability to identify non-value-added elements and activities using specific tools related to Lean and Six Sigma. Tasks may include employing quality management systems, tools, and techniques to help organizations transform, including, but not limited to Lean Six Sigma (LSS), ISO 9000/9001, and the Malcolm Baldrige Quality Award criteria.	BA/BS degree	4 years	$151.26	$147.48
Management Analyst, Junior	Performs tasks requiring delivery of analysis and advice for management regarding the evaluation of the effectiveness and efficiency of large scale programs and operations. Tasks may include conducting organization studies that specifically assess and analyze current organization states and management systems; performing gap analyses of differences between current and targeted states; documenting and delivering findings and recommendations; and conducting surveys, focus groups, and other accepted techniques for data collection in support of organization studies that specifically assess and analyze current organization states and management systems.		Junior: 3 years	$64.72	
Management Analyst, Senior		BA/BS degree	Senior: 8 years	$165.76	$161.62
Process Improvement Specialist I	Performs evaluating, planning, and recommending improvements to VT. The individual can also facilitate brainstorming events that are focused on the improvement of processes within the organization.	AAS Degree	Level I: 1 year	$71.13	
Process Improvement Specialist II			Level II: 5 years	$75.94	
Process Improvement Specialist III			Level III: 10 years	$87.58	
Project Manager	Performs responsibilities of initiating, planning, executing, controlling, and finalizing work on individual projects supporting broader VT efforts to achieve specific goals and meet specific success criteria. Application of knowledge, skills, tools, and techniques to project activities to meet the project requirements and milestones.		Senior 8 years	$97.52	

Program Manager	Performs responsibilities of initiating, planning, executing, controlling, and closing the work of the VT support team to achieve specific goals and meet specific success criteria. Application of knowledge, skills, tools, and techniques to project activities to meet the project requirements and milestones.	Senior 8 years	$102.11
Quality Management Specialist	Performs tasks related to promoting systems and techniques assuring the quality of products and services including the development of plans and programs for achieving and maintaining product and service quality throughout the product/service life cycle; monitoring operations to prevent the production of defects and to verify adherence to quality plans and requirements; and analysis and investigation of adverse quality trends or conditions and initiation of corrective action. Tasks may include employing quality management systems, tools, and techniques to help organizations transform, including, but not limited to ISO 9000/9001, and the Malcolm Baldrige Quality Award criteria.	BA/BS degree 4 years	$80.93
Requirements Manager	Manages and verifies VT customer requirements; captures detailed descriptions of system capability and functionality; and ensures the project team has clear, consistent, and testable requirements documented in test plans, test procedures, and completion criteria. Reviews requirements with VT customer representatives. Develops and maintain the Requirements Verification Traceability Matrix (RVTM) or similar tracking tool. Coordinated with the Test Engineers to align testing priorities with the business needs and confirmed requirements. Supports Change Control processes and VT review boards to ensure that the appropriate categorization and disposition of all requirements. Supports the Program Manager and Contracts Administrator for requirements disposition, when an explicit requirement cannot be met as specified, to revise the requirement with the customer.		$75.94

Title	Description	Education	Experience	Rate
Research Assistant	Performs tasks which support the relevant research of a project. Tasks may include conducting literature or other relevant research; supporting the development of project deliverables such as position papers, guides and cognitive interview materials; providing administrative research support; maintaining documents and records for assigned tasks; and utilizing external resources to supplement, organize, and contribute to tasks and deliverables.	Baccalaureate Candidate	3 years	$32.88
Research Intern	Performs tasks which support the relevant research of a project. Tasks may include conducting literature or other relevant research; supporting the development of project deliverables such as position papers, guides and cognitive interview	Baccalaureate Candidate	0 Years	$23.74
Researcher	Performs tasks related to performing research, or other professional and scientific work, in one or more of the social sciences, including economics, psychology, social work, or in the administration of public welfare and insurance programs. Tasks may include developing and conducting experimental research design plans; translating data into actionable insight; and conducting site visits or phone interviews to support the research team.	Masters	6 years	$57.80
Senior Consultant	Analyzes client information and develops and evaluates top-line outreach strategies to meet objectives. Demonstrates in-depth knowledge and manages the client service aspects of the account portfolio and assumes responsibility for bottom-line results. Develops and implements high-level strategic communications; manages, motivates, and leads staff; and builds and manages project teams. Ensures the contract team performs work on schedule and budget.	MA/MBA Degree	10 years	$95.51
Junior Consultant		BA	6 years	$74.60
Statistician, Senior	Performs tasks related to applying statistical theories, techniques, and methods to gather, analyze, interpret, and/or report quantified information. Tasks may include performing valid and useful analyses of data sets in support of task areas using existing data or data to be collected.	BA/BS degree	Junior: 3 years	$102.49
Statistician, Junior			Senior: 8 years	$69.57

Role	Description	Education	Experience	Rate	
Strategic Planner, Junior	Performs tasks related to providing content and process expertise for providing advice for establishing and implementing a strategic direction. Tasks may include supporting strategic planning, including the development of strategic goals, objectives, strategies, performance measures, targets, improved programmatic outcomes, and linkages to programming, budgeting and evaluations; supporting strategic performance measure development, including improved linkage between VT-wide strategic goals and programmatic outcomes.	BA/BS degree	Junior: 3 years	$69.57	
Strategic Planner, Senior		MA	Senior: 8 years	$96.33	
Subject Matter Expert	Performs tasks requiring a recognized level of expertise in a specified subject area.	Masters	8 years	$146.08	
Subject Matter Expert – CHANGE IMPLEMENTATION	The contractor shall designate a Change Implementation SME to support VT in executing organizational change. The staff shall assist in the development and conducting of stakeholder analyses, impact analyses, and implementation planning. The Change Implementation SME shall also provide input on the associated risks resulting from the change activities in the organization and to the VT stakeholder Community.	Master's	8 years	$98.42	
Subject Matter Expert – COMMUNICATIONS	Corporate knowledge of large-scale communications in a learning/institutional setting; knowledge/experience with stakeholder outreach and communication campaigns; media analysis regarding social media platforms; experience with implementing successful (proven) communications campaigns in an integrated setting. Provide expert advice related to strategic communications for both internal and external stakeholders.	Master's	8 years	$99.06	
Subject Matter Expert – PROGRAM IMPLEMENTATION	The contractor shall designate Program Implementation staff to implement new Projects and/or Programs, as identified by senior VT leadership. The Projects and/or Programs may or may not be VT enterprise wide, or may be localized to a single, or multiple VT entities. Tasks will include release and implementation management, supporting performance outcomes, targets, improved programmatic outcomes, and linkages to programming, budgeting and evaluations; supporting strategic performance measure development, including improved linkage between VT-wide strategic goals and programmatic outcomes.	Master's	8 years	$183.75	$179.16

Title	Description	Education	Experience	Rate	Rate
Subject Matter Expert –EDUCATION LEADERSHIP	Education Leadership SME experts support VT in the analysis, design, development, and implementation of appropriate business processes within the organization. The EL SME shall assist VT with the analysis of current and future state concepts for the VT; development of new business processes; diagnosis of current problems, and redesign, reconstruction, and monitoring processes to make sure they are effective. The SME shall assist VT with the continuous analysis per policy or organizational changes.	Master's	8 years	$183.75	$179.16
Subject Matter Expert -Functional	"Functional Responsibilities: A Functional/SME requires a minimum of ten years XXXXXXX consulting experience. Experience include management and direction on project engagements, working experience in project definition and business and systems analysis, creation of competitive strategies, cost benefit analysis for make/buy decisions and integration of system to system business solutions across an integrated delivery system. A Functional/SME works with the Project Director and other senior staff to monitor the status of the engagement, identify potential risks, issues, advises and consults on all significant developments, and designs a strategy for addressing them and monitor quality. A Functional/SME is proficient in reviewing strategic plans and business strategies and design, organizational and infrastructure designs, and project deliverables to maintain a standard of consistency and quality throughout a project's life cycle. .	Master's	8 years	$163.77	
Technical Writer, Junior	Experience writing, editing, publishing reports and technical documents. Strong experience with computer based systems.		Junior: 3 years	$59.59	
Technical Writer, Senior	Gathers, analyzes and composes technical information required for preparation of user manuals, training materials, installation guides, proposals, reports, etc. Edits functional descriptions, system specifications, user manuals, special reports, or any other customer deliverables and documents. Conducts research and ensures the use of proper technical terminology. Translates technical information into clear, readable documents to be used by technical and non-technical personnel	HS Diploma	Senior: 8 years	$83.00	

Training Analyst	Performs tasks related to the development and maintenance of all user documentation and training materials. Tasks may include developing and maintaining traditional and non-traditional user support materials, such as e-learning and job aids; providing training support, both in person and online, on an as-needed basis; conducting business process reviews with clients to understand current workflows; preparing gap analysis and requirements documentation; authoring software specifications for enhancements to a system; preparing training plans; and participating in go-live events.	BA/BS degree	4 years	$73.16
Trainer, Junior	Performs tasks related to the planning, creating, and executing test administration, learning management, customized subject matter specific training and educational courses that are delivered via an instructor-led (traditional classroom setting or conference/seminar) or web-based (Internet/Intranet, software packages and computer applications) system. Tasks may include conducting evaluations; analyzing and identifying communication and skill requirements; translating needs into workshop and remedial training modules; developing and revising workbooks and class instructional materials associated with standard and customized workshops; performing training related administrative tasks; developing and maintaining training databases; conducting face-to-face and online training; attending and participating in meetings and committees; and making presentations as needed.		Junior: 3 years	$46.20
Trainer, Senior		BA/BS degree	Senior: 8 years	$65.52