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1. General Overview

1.1 Description of Cooperative

Educational & Institutional Cooperative Services, Inc. (E&I) is a member owned New York non-profit corporation established in 1934 and is governed by a Board of Directors. The Board of Directors is a group of professionals who are elected by the E&I Membership. The Board provides oversight to ensure the Members' needs are addressed and met. Our Membership is comprised of public and private universities and colleges, community colleges, other affiliated members, K-12, and teaching healthcare facilities throughout the United States.

Our mission is to assist our members in creating supply-chain efficiencies, lowering costs and reducing risks by collaborating with our members, suppliers and strategic partners. We deliver exceptional value to higher education, K-12 and related communities by making it easy for them to access high-quality contracts, strategic sourcing expertise, insights and unrivaled customer service.

1.2 Purpose and Intent of the Request for Proposal (RFP)

The purpose of this RFP is to establish a cost-effective Master Agreement ("Agreement") for Executive Search & Recruitment Services which complies with our Member procurement requirements and will provide E&I Members a procurement vehicle to acquire the services outlined within this RFP. All E&I Members will be eligible to participate in the resulting agreement.

Services considered for award shall equal or exceed the quality level of industry standards as defined within this RFP and shall comply with all applicable federal, state, and local technical, environmental, and performance standards and specifications.

The awarded Respondent(s) is/are expected to be a fully authorized to provide for full executive search and recruitment services. These services will include the entire search process, up to and including the point of final appointment by the E&I Members Institutions. Respondent(s) will be required to work closely with individual E&I Members search committees in the preparation of the job description and recruiting materials, assist in keeping the campus community apprised of the status of the search, and participate in the development and implementation of recruitment strategies, including placing advertisements, etc. Respondent(s) will identify, recruit and encourage potential applicants, review their qualifications and verify the credentials of all finalists. Respondent(s) will also assist the search committee in the preparation of campus visits by candidates, coordinate travel arrangements for candidates, and assist in the finalization details of the candidate's employment contract as may be required by the Institution. Respondent(s) will be responsible for conducting an information session early in the process that includes a discussion of procedures, roles and responsibilities, code of conduct, and time frame for completion. The Respondent must be able to provide services and timely deliveries to all Members and campuses. Direct involvement by the awarded Respondent may be necessary to assist Members in understanding the different types of services available and in selecting the best solution to fit their needs.

The maximum all-inclusive fee proposed on the Cost Proposal Worksheet will be the maximum fee a firm may charge for any individual search awarded as a result of the RFP. Respondent(s) may always provide a quote for less than the maximum fee for any individual search but may never exceed the maximum fee. The all-inclusive fee for an individual search may not exceed 25% of the first year's annual salary, or \$250,000 whichever is the lowest all-inclusive fees. The E&I Members reserve the right to negotiate the all-inclusive maximum fees in accordance with their institutional applicable standards and requirements.

Throughout this RFP, E&I and Institution may be referred to collectively as the "E&I Members". Additionally, the words "respondent", "contractor" and "vendor" will be used interchangeably throughout the RFP.

E&I is committed to utilizing purchasing and business practices in accordance with the National Association of Educational Procurement Code of Ethics. The primary goals and objectives of E&I are to: (1) assist our Members to obtain the absolute lowest cost and best value that exceeds other public sector consortia agreements, (2) establish a strategic sourcing partnership with any selected manufacturer(s) and authorized dealers, and (3) enhance our position as the premier Procurement Cooperative for Education.

1.3 Market Opportunity

By satisfying the above Member needs, the Cooperative anticipates significant Member purchases to be recorded against the resulting Agreement(s). The Cooperative currently has more than 5,000 Members, comprised of roughly 50% public and 50% private. K-12 school districts, academic healthcare and research institutions are eligible for membership in E&I. The

Cooperative's expectations are a substantial opportunity for growth (in terms of Member purchases) with competitively awarded Agreement(s) in these markets. There is also interest in utilizing the potential contract by the Participating Oregon Community Colleges (POCC).

1.4 Member Participation

Once the awarded Respondent has been established and the Agreement finalized, individual E&I Members (in some situations Member departments) will review the awarded Respondent's program and determine their individual participation. See Section B43 of E&I's Master Agreement Template General Terms and Conditions for specific details on how members participate in awarded Respondent's program. The awarded Respondent's program includes the Agreement along with additional supporting materials (if any) developed by the awarded Respondent.

Upon award of a Master Agreement from this RFP, the Respondent shall be provided an electronic file listing of E&I Members. Updated versions will be sent as needed. E&I will post the awarded Respondent's program on the E&I internal web site which is password protected and only available to E&I Members.

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2. Standard RFP Provisions

2.1 Definitions

The following are the definitions of general terms used in this RFP.

DAYS: All days specified are based on calendar days unless otherwise noted.

EDUCATION: The combination of Higher Education and K-12.

GO TO MARKET: Strategy or action plan specifying how the Respondent will utilize its inside and outside resources (e.g. sales force and distributors, marketing initiatives, etc.) to deliver its products and/or services to the Education market through an E&I contract.

<u>Contract Region Key</u>	<u>States</u>
Northeast	CT, MA, ME, NH, NY, RI, VT
Mid-Atlantic	DC, DE, MD, NJ, PA, VA, WV
Southeast	AL, FL, GA, KY, MS, NC, SC, TN
Central	AR, IA, KS, LA, MN, MO, ND, NE, OK, SD, TX
Great Lakes	IL, IN, MI, OH, WI
Western	AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

GREATEST BENEFIT: The decision for award will be based on an overall combination of variables such as quality, price and various elements of required service that in total are optimal relative to the needs of the E&I Membership.

HIGHER EDUCATION: All Universities, Colleges, Healthcare Facilities (private and public), i.e., Associate, Bachelor, Master, and/or PhD in the United States, that provide for advanced learning and/or grant degrees. These Universities, Colleges and Healthcare Facilities may or may not be members of E&I.

HUBS: Historically Underutilized Businesses e.g., minority, women-owned businesses (for the State of Texas, Certified HUBS within the State of Texas).

K-12: All School Systems and Districts (private and public) in the United States that provide education for students in Kindergarten through 12th Grade. These School Systems and Districts may or may not be members of E&I.

MANUFACTURER: Indicates an entity that makes the products from raw materials outlined in this RFP, all of its agents, and employees.

MAY: Indicates something that is not mandatory but permissible/desirable.

MEMBERS: Includes Institutions, Universities, Colleges (private and public) and K-12 schools that are listed in the E&I record.

MONTH END: Shall mean the last calendar day of each month.

MOST RESPONSIBLE: A Respondent whose reputation, past performance, and business and financial capabilities are such that the Respondent would be deemed most capable of satisfying Member needs for a specific contract.

MUST, SHALL, WILL: The words “shall,” “must,” or “will” are equivalent and indicate mandatory requirements or conditions. E&I will not waive Responder’s material deviation from any of the mandatory requirements.

MWBE: Minority, Woman-owned Business Enterprises.

NATIONAL AGREEMENT: E&I awards an Agreement which is available throughout the United States (including Alaska and Hawaii).

REGIONAL AGREEMENT: E&I may elect to award an Agreement by Geographical Areas of the United States. See table below for geographic breakdown:

RESPONDENT: Entity who submits a proposal to an RFP.

RESPONSIBLE: A Respondent is responsible if they are capable or qualified to perform the work.

RESPONSIVE: A proposal is responsive if it meets all of the requirements of the RFP.

SHALL, MUST, WILL: Indicates a mandatory requirement(s) that must be addressed. Failure to address these mandatory requirements will result in rejection of your proposal as non-responsive. E&I may, but is not required to, reserve the right to request additional information.

SHOULD: Indicates something that is recommended but not mandatory. If the Respondent fails to provide recommended information, E&I may, at its sole option, ask the Respondent to provide the information or evaluate the proposal without the information.

SOLE POINT OF CONTACT: The Contract Manager or designee to whom Respondents shall address any questions regarding the solicitation or award process. The sole point of contact shall be the arbitrator of any dispute concerning performance of the Contract.

SUCCESSFUL RESPONDENT: The Respondent(s) or individual(s) who are the recommended recipient(s) of the award of a contract under this RFP (also synonymous with “Payee,” “Offeror,” “Contractor,” “Vendor,” and “Supplier”). If a Respondent is a manufacturer, its certified dealers and resellers may also furnish products under the Contract; in choosing to do so, the dealers and resellers agree to honor the Contract and the term “contractor” shall be deemed to refer to them. Unless awarded the Contract as a direct Respondent, however, dealers and resellers are not parties to the Contract, and the Respondent that certifies them shall be responsible for their actions and omissions.

SUPPLIER: Indicates an entity that distributes/furnishes the products and or services of a company, all of its agents, and employees. For the purposes of this RFP, the terms Supplier and Respondent may be used interchangeably.

2.2 Term

The Agreement term will be for five (5) years with the option of one five (5)-year renewal. Exercise of any renewal will require formal written notification and mutual agreement between E&I and Respondent at least one (1) year prior to Agreement expiration.

If this RFP results in an Agreement, a hold-over clause may be invoked by the E&I member on a month by month or year by year basis as per the agreement between the member and Respondent utilizing the same terms and conditions as listed in Agreement between the awarded Respondent and E&I.

2.3 Sole Point of Contact

Stephanie Moore

Contract Manager, General Service
Educational and Institutional Cooperative Services, Inc.
2 Jericho Plaza, Suite 309
Jericho, New York, 11753-1671
Voice: (631) 630-8300
E-Mail: smoore@eandi.org

Respondents to this RFP or persons acting on their behalf shall not contact any E&I employee, officer, or agent; any E&I Board of Directors; or any E&I Member concerning any aspect of this RFP, except in writing to the Sole Point of Contact, from the date of release of this RFP through the official award date. Violation of this provision may be grounds for rejecting a proposal response. See Section 3.4 on how to submit questions.

2.4 Evaluation Process

Any contract(s) resulting from this Request for Proposal will be awarded in writing to responsive and responsible Respondents whose proposal, in the opinion of the evaluation team, offers the greatest benefit to our members when considering the total value including the quality, service levels, customer service and total cost (including any trade, prompt payment discounts, and other miscellaneous charges).

All proposals should be complete to be considered responsive. If the proposal fails to conform to the requirements of the RFP, E&I and/or the RFP evaluation team will determine whether the variance is significant enough to consider the proposal.

The evaluation team conducts its evaluation across the criteria listed in section “2.5 Evaluation Criteria.” Each stage is independent of the other, and the evaluation team will not evaluate the pricing nor will they be privy to the pricing until the technical evaluation is complete.

As part of the evaluation process, E&I may require a demonstration/presentation before the award is made and the demonstration/presentation may be considered as an additional factor in award. Selected Respondent(s) shall be given a script and/or instruction for the presentation in order to provide the evaluation team further insight regarding their proposal and to clarify any issues. Failure of a Respondent to conduct a presentation on the date scheduled may result in rejection of the Respondent’s proposal. In addition, E&I may decide to make site visits, as needed, during the evaluation process which shall be coordinated with the respective Respondent(s).

2.5 Evaluation Criteria

The RFP evaluation team will review and evaluate RFP responses according to the following weighted criteria based on a total of 100 points.

No.	Criteria	Criteria Overview	Points
1	RFP Response Quality	<ul style="list-style-type: none"> Thoroughness, detail, and engagement in RFP response 	10
2	Contract Alignment & Connection	<ul style="list-style-type: none"> Contract connection process to Member Contract channeling to E&I (direct, net new, etc.) 	10
3	Supplier Diversity	<ul style="list-style-type: none"> Certifications and Designations Company Program and Overall Commitment to Supplier Diversity Quality and Availability of Reports 	10
4	Business Partner Capability	<ul style="list-style-type: none"> References Qualifications and Experience Ability to partner with E&I to deliver a superior competitive advantage to our Members. 	30
5	Economic Value and Financial Overview	<ul style="list-style-type: none"> Pricing, Discounts, Rebates, etc. Financial reporting, audit, and compliance. 	25
6	RFP Exceptions	<ul style="list-style-type: none"> Business Partner ability to closely aligns with RFP and Members’ institutional policies, federal, state, and local legal and regulatory requirements and policies 	10
7	Risk Profile	<ul style="list-style-type: none"> Litigation Financial Health Education Sector Spend Profile 	5

2.6 Terms and Conditions of Agreement

As a result of this RFP process, it is our expectation that an Agreement will be established between E&I and one or more of the Respondents. The Agreement will incorporate the relevant terms and conditions of this RFP and Respondent’s proposal.

2.7 Protest Procedures

Any actual or prospective Respondent (“Protesting Party”) who is aggrieved in connection with a solicitation or selection for award may file a written protest up to seven (7) calendar days after issuance of a Non-Award Letter in accordance with the procedures described herein and pursuant to the Protest Rules in the Execution of Offer.

2.7.1 Filing of Protest

1. The Protesting Party shall send its written protest to:

Senior Vice President of Sourcing & Contracts
E&I Cooperative Services, Inc
Attention: Solicitation Protest
2 Jericho Plaza, Suite 309
Jericho, NY 11753

In addition to sending the written protest to the address listed below, the Protesting Party shall also send an electronic copy to supplierrelations@eandi.org.

2. The written protest shall contain the following:
 - a. Name, address, telephone number, fax number, and email address of the Protesting Party.
 - b. The signature of the Protesting Party or their representative.
 - i. The signature of an attorney or Protesting Party on a protest or other document constitutes a certificate by the signer that the signer has read such document, that to the best of the signer's knowledge, information, and belief formed after reasonable inquiry, and that it is not interposed for any improper purpose, such as to harass, limit competition, or to cause unnecessary delay, or needless increase in the cost of the procurement. If a protest or other document is signed in violation of this subsection before or after appeal to the Chief Solutions Officer, the Protesting Party shall be liable to pay E&I the amount of the reasonable expenses incurred because of the filing of the protest, including E&I's reasonable attorneys' fees.
 - c. Identification of the solicitation and award that is being protested.
 - d. A detailed statement of the legal and factual grounds of the protest including copies of relevant documents.
 - e. The form of relief requested.
3. E&I shall be entitled to payment of its reasonable expenses incurred because of the filing of the protest, including E&I's reasonable attorneys' fees, in the event of a decision by the Chief Solutions Officer that:
 - a. A protest or other document was signed, before or after appeal to the Chief Solutions Officer, in violation of subsection 2.b.(i) above;
 - b. The protest has been brought or pursued in bad faith; or
 - c. The protest does not state on its face a valid basis for protest.
4. The Protesting Party shall post a bond in an amount of \$10,000 at the time of filing the written protest payable to E&I Cooperative Services, Inc. Such protest bond shall be in form and substance acceptable to E&I and shall be immediately payable to E&I to secure payment under section 3 above. E&I does not waive any right to seek payment of additional amounts if the bond is not adequate to reimburse E&I the full amount of its reasonable expenses caused by the protest.
5. E&I shall hold such protest bond for at least fourteen (14) calendar days after the date of the final determination by E&I. If the Protesting Party appeals the determination in accordance with the procedures herein, E&I shall hold such protest bond until instructed by the Chief Solutions Officer to either keep the bond or return it to the Protesting Party.
6. The Senior Vice President of Sourcing & Contracts shall have the authority to resolve the protest. If deemed necessary, the Senior Vice President of Sourcing & Contracts may request a meeting with the Protesting Party to seek clarification of the protest issues.
7. The Senior Vice President of Sourcing & Contracts shall promptly issue a decision in writing within seven (7) calendar days of receipt of the written protest. E&I will mail a copy of the decision or otherwise furnish a copy to the Protesting Party which will include the reasons for the action taken.

2.7.2 Waiver of Protest

Any of following actions shall constitute a Protesting Party's waiver of protest proceedings and litigation.

- If the Protesting Party does not adhere to the Protest procedures as outlined herein to include filing a written protest within seven (7) calendar days after issuance of a Non-Award Letter in conjunction with an E&I competitive solicitation, or in the case of an appeal within five (5) calendar days of the protest decision.
- If the subject matter of the Protest was known or should have been known to the Protesting Party before the Deadline for Submission of RFP-Related Written Questions and the Protesting Party did not raise the issue in a written comment.
- If the Protesting Party fails to post a bond at the time of filing the written protest payable to E&I Cooperative Services, Inc. in an amount equal to \$10,000. The bond shall be conditioned upon the payment of all costs which may be adjudged against the Protesting Party filing the protest action.

2.7.3 Appeals

1. The Protesting Party may file an appeal of the decision made by the Senior Vice President of Sourcing & Contracts with the Chief Solutions Officer, within five (5) calendar days of the written protest decision.

2. The Protesting Party shall send Appeals to:

Chief Solutions Officer
E&I Cooperative Services, Inc
Attention: Protest Appeals
2 Jericho Plaza, Suite 309
Jericho, NY 11753

In addition to sending the written appeal to the address listed below, the Protesting Party shall also send an electronic copy to supplierrelations@eandi.org.

3. The decision by the Chief Solutions Officer is final and shall be given in writing and submitted to the Protesting Party within five (5) calendar days of receipt of the written appeal.
4. No further appeal of E&I decision on the protest is authorized, and Respondent expressly waives any right to invoke any other authority or dispute resolution mechanism concerning matters addressed by these Protest Procedures.

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3. Proposal Response Requirements

All proposals are subject to the conditions specified herein. E&I, in its sole discretion, may reject a Proposal as non-responsive if Respondent fails to follow these instructions and requirements.

3.1 Tentative Schedule of Events

The following is a tentative schedule of events for this RFP: all due dates are subject to change with notification.

Activity	Due Date
Request for Proposal issued (“Open Date”)	June 24, 2022
5 PM ET Deadline for submission of RFP-related written questions (“Q&A Submission Close Date”)	July 28, 2022
1 PM ET Deadline for Receipt of Proposals (“Close Date”)	Aug. 8, 2022
Evaluation, Clarifications (Technical)	Aug. 22, 2022
Evaluation, Clarifications (Pricing)	Sept. 12, 2022
Negotiations Begin on or about	Sept. 19, 2022
Anticipated Award(s)/Letter of Intent (LOI)	Oct. 19, 2022
Acceptance and Execution of Agreement	Oct. 31, 2022
Implementation	Nov. 1, 2022

3.2 Proposal Submission

- 3.2.1 Proposal responses must be submitted via E&I’s Electronic Sourcing Solution via the link below and clicking on the “Respond Now” button.
<https://bids.sciquest.com/apps/Router/PublicEvent?CustomerOrg=EandICooperative>
- 3.2.2 Hard copy submissions or submissions through any other medium other than through [E&I’s Electronic Sourcing Solution](#) are not permitted.
- 3.2.3 Proposal responses shall be submitted exactly as outlined, and the required information shall be provided in the section under which it is requested. Respondents may not combine or reorganize headings and/or requests for information or indicate the information will be included in another section. Proposal responses shall not refer E&I to any location outside the requested sections noted within the required format below (i.e. links to external website).
- **Prerequisites** – Review the following prerequisites and certify acknowledgment where indicated.
 - RFP Provisions and Specifications
 - Execution of Offer and Certifications
 - **Supplier Attachments** – Upload additional files relevant to proposal response. NOTE: Information submitted that is not requested by E&I may be considered to be supplemental and not subject to evaluation.
 - **Questions** – Review and respond to each question section.
 - Response to Specifications
 - Respondent’s Capabilities
 - Respondent’s Qualifications
 - Supplier Diversity
 - Added Value Solutions
 - RFP Exceptions
 - Pricing
 - Contract Alignment & Connection
 - eMarket Integration & Capability
 - **Q&A Board** – Ask sourcing event-related questions, receive responses, read other public questions and answers, and respond to buyer-submitted questions. See additional information in section 3.4.
- 3.2.4 Proposals must be received by the RFP Close Date/Time Deadline.

- 3.2.5 Each Respondent is solely responsible for the timely delivery of its proposal. Failure to meet the proposed date and time shall be grounds for rejection.
- 3.2.6 DO NOT ALTER THE RFP document IN ANY WAY. The only acceptable changes or alterations to the RFP will be made in the form of addenda issued only by E&I.
- 3.2.7 A Supplier may withdraw or modify its proposal prior to the Close Date/Time Deadline.
- 3.2.8 Elaborate proposals (e.g. expensive artwork) beyond that sufficient to present a complete and effective proposal are not necessary or desired. E&I will not pay for any information requested nor is it liable for costs incurred by the Respondent in responding to this RFP.
- 3.2.9 All submitted proposals constitute an offer by each respective Respondent and shall remain irrevocable for a period of 180 days following the Submission Deadline.
- 3.2.10 If Respondent's proposal deviates from these instructions, such proposal may, at E&I's sole discretion, be rejected.

3.3 Upload Instructions and Recommendations

- 3.3.1 Submissions are to be uploaded prior to the Close Date/Time Deadline as indicated in Section 3.1 Tentative Schedule of Events. It is strongly recommended to allow sufficient time and at least ONE (1) hour before the Close Time to begin the uploading process and to finalize submission.
- 3.3.2 Each item of Requested Information is instantly sealed (no one from E&I can review) and will only be visible after the Close Date/Time. Submissions may be edited as needed up until the Close Date/Time.
- 3.3.3 Responders may elect to utilize the import/export feature to export questions into Excel in order to work on responses offline and import into the system upon completion.
- 3.3.4 Keep in mind that when answering questions in the provided text box within the system (if applicable) there is a limit to the number of characters you can use in your response. The dynamic character limit counter at the bottom of each text box will display the remaining characters available.
- 3.3.5 Uploading large documents may take significant time, depending on the size of the file(s) and your Internet connection speed. The maximum upload file size is 50 MB. If your file is greater than 50 MB, you can either break it up into multiple files as there is no limit to the number of files less than 50 MB. Alternatively, you could also provide a link to an online file share location (i.e. Dropbox, Box, Google Drive, Microsoft OneDrive/SharePoint etc.).
- 3.3.6 Do not embed any documents within your uploaded files, as they will not be accessible or evaluated.
- 3.3.7 Information submitted that is not requested by E&I may be considered to be supplemental and not subject to evaluation.
- 3.3.8 Any questions relating to log-in issues or technical issues, including attachments, can be submitted to our third-party software host, Jaggaer via a Support Form:
<https://go.jaggaer.com/SupplierSupportRequest.html> or via (800) 233-1121, option 2 then option 2.

3.4 Respondent Questions

All sourcing event-related communications between Respondents and E&I is managed and tracked in [E&I's Electronic Sourcing Solution](#) through the RFP Event's Q&A Board.

- 3.4.1 Use the Question & Answer (Q&A) Board within the RFP event of [E&I's Electronic Sourcing Solution](#) to ask any questions. Refer to the Tentative Schedule of Events for the last day to submit questions. At all times it shall remain the responsibility of the Respondent participating in the RFP to check the RFP event for any addenda, notices or award decisions and the Q&A Board for updates. No further notice will be given.
- 3.4.2 Respondents are expected to raise any questions or concerns they have regarding the RFP. If Respondent discovers any significant ambiguity, error, conflict, discrepancy, omission or other deficiency in this RFP, Respondent should immediately notify the Sole Point of Contact of the deficiency and request modification or clarification of the RFP document using the Q&A Board.

- 3.4.3 Any questions and responses specific to the terms and conditions, process, procedures, language, specifications and other parts of the RFP may be made public and may be shared with other Respondents. Do not provide any proprietary information in a question or in a response to an answer to a question.
- 3.4.4 Only those communications that are in writing from E&I shall be considered as a duly authorized expression on behalf of E&I. Respondents may not consider any verbal instructions as an official expression on E&I's behalf. **QUESTIONS DIRECTED TO, OR ANY PROPOSALS RECEIVED FROM ANY OTHER PERSON, AGENT, OR REPRESENTATIVE OF E&I WILL NOT BE CONSIDERED VALID OR BINDING.** Also, E&I will recognize only communications from Respondents that are either signed and in writing or submitted directly within E&I's Electronic Sourcing System as duly authorized expressions on behalf of the Respondent.

3.5 Rights Reserved by E&I and Restrictions on RFP Process

- 3.5.1 E&I reserves the right to issue Addenda to the RFP at any time prior to the Close Date/Time.
- 3.5.2 E&I reserves the right to reject any or all proposals or any part thereof.
- 3.5.3 E&I reserves the right to make an award and/or multiple awards by section, in whole, or to make no award as determined to best meet the needs of the membership.
- 3.5.4 E&I reserves the right to make an additional award to the highest ranked diverse supplier.
- 3.5.5 E&I recommends that a Respondent's initial proposal reflect its most favorable terms. E&I reserves the right to negotiate with any Respondent(s) and to arrive at its final decision and/or to request additional information or clarification on any matter included in the proposal.
- 3.5.6 If this RFP is regional in scope, E&I, upon mutual agreement of the Respondent, may expand the Agreement to additional regions or nationally.
- 3.5.7 E&I, in its sole discretion, reserves the right to waive any irregularity or minor variance in any proposal received, including but not limited to obvious mathematical errors in extension of pricing, failure to date the proposal, or failing to execute any certification not considered salient to price, delivery or acceptance of an agreement award.
- 3.5.8 E&I reserves the right to select the most responsible Respondent(s) without further discussion, negotiation, or prior notice.
- 3.5.9 E&I may presume that any proposal is a final proposal revision (otherwise known as a "Best-and-Final Offer").
- 3.5.10 E&I reserves the right to delete specific line items in order to provide a basis for an evaluation of the prices quoted by all Respondents.
- 3.5.11 **Any discussion with E&I personnel, other than the Contract Manager listed as the Sole Point of Contact regarding this RFP while the RFP is in progress (from the time Respondent receives this RFP until final award is made) is strictly prohibited. Such contact and discussion may result in disqualification of Respondent's proposal.**
- 3.5.12 E&I is the sole owner of all data and information contained within the RFP document and accompanying attachments. Respondent shall use this information exclusively to prepare a proposal. Respondent should not disclose this information to any other firm or use it for any other purpose unless required by law or legal process.
- 3.5.13 Respondent proposals will be opened and reviewed at the convenience of E&I.
- 3.5.14 All proposals and related information submitted become the property of E&I; they will not be returned and may be subject to disclosure under the Freedom of Information Act, Open Records laws or other laws existing in E&I Members' states. As such, proposal(s) may be released to third parties, without prior notice to Respondent(s), as required to comply with legal requirements.
- 3.5.15 Respondents must clearly indicate which portions of their response are "Confidential" – considered to contain confidential or proprietary information.

4. Scope of Products and Services

The Respondent(s) is/are expected to provide executive searches and conduct recruitments according to guidelines promulgated by the E&I Members Institutions. An E&I Members Institutions may have search committee serves as an advisory group that selects the finalist and ultimately make final selections. All services offered under a resulting agreement shall include services for executive search, recruitment, and retention of C-Suite leadership and development of strategies for increasing diversity and inclusion organization-wide.

4.1 Executive Search and Recruitment Services

The services of Respondent(s) will be utilized by E&I Members to recruit and retain academic C-Suite leadership and executive leadership for various professional disciplines throughout its Institutions, and to develop strategies for increasing diversity and inclusion organization-wide. Respondent(s) will be expected to also conduct searches for senior management positions assuring a diverse and inclusive slate of candidates for every search. Respondent(s) will provide dedicated resources with extensive experience in the Education vertical, to include Higher Education athletics, research, and healthcare teaching facilities and K-12. The Respondent(s) will possess a deep understanding of the emerging trends and evolving challenges in the market and the needs of the talent perspective to drive success and growth. Respondent(s) must include a robust and thoughtful employment screening program to be able to procure candidate background information using diverse technological innovations tailored to the requirements of both the Institution and the position to avoid negligent hiring lawsuits.

Respondent(s) must possess a deep knowledge of key leadership positions, the responsibilities of these roles, and the attributes that define qualified executive talent. The expectation for Respondent(s) leading the search would ensure a senior level personnel is leading the searches with a keen insight to confidentiality, data security and privacy protection for personal information collected in conducting executive searches. Respondent(s) personnel must uphold a proven track record of representing organizations with professionalism and discretion. The right firm will have the expertise to validate Member's criteria where it makes sense, but also challenge the Member's search when it limits hiring potential.

Respondent(s) must be able to provide services for a full search. These services will include the entire search process, up to and including the point of final appointment by the E&I Members Institutions. Respondent(s) will be required to work closely with individual E&I Members search committees in the preparation of the job description and recruiting materials, assist in keeping the campus community apprised of the status of the search, and participate in the development and implementation of recruitment strategies, including placing advertisements, etc. Respondent(s) will identify, recruit and encourage potential applicants, review their qualifications and verify the credentials of all finalists. Respondent(s) will also assist the search committee in the preparation of campus visits by candidates, coordinate travel arrangements for candidates, and assist in the finalization details of the candidate's employment contract. Respondent(s) will be responsible for conducting an information session early in the process that includes a discussion of procedures, roles and responsibilities, code of conduct, and time frame for completion.

The Bidder's All-Inclusive Fee

The maximum all-inclusive fee proposed on the Cost Proposal Worksheet will be the maximum fee a firm may charge for any individual search awarded as a result of the RFP. Respondent(s) may always provide a quote for less than the maximum fee for any individual search but may never exceed the maximum fee. The all-inclusive fee for an individual search may not exceed 25% of the first year's annual salary, or \$250,000 whichever is the lowest all-inclusive fee payable in minimum of three consecutive payments. E&I Members reserve the right to negotiate the all-inclusive fees for a lower percentage rate or a flat fee in accordance with their institutional standards and requirements. The Respondent(s) will be expected to provide a minimum one (1) year guaranteed placement, with no additional charges or fees for providing a replacement anytime within the first year of the initial placement.

Non-Solicitation/Non-Employment

Respondent(s) must not solicit, employ, hire, or otherwise engage any person employed at the time or within the following twelve months thereafter any E&I Member Institution personnel or any affiliate personnel thereof. In the event of a breach there will be an assessment of liquidated damages no less than 10% of such employee's annual base compensation. Notwithstanding, the following does not constitute a breach of the foregoing: (a) general advertisements for employment; (b) the use of an employee placement service not specifically directed at an employee or consultant of the parties; and (c) unsolicited applications for employment.

4.2 Category Experience Specifications (See 4.2 Category Experience Specifications Attachment A)

Specifications must include but are not limited to:

- Clear identification of the category specialty type of executive searches offered and fee structure(s)
- A well-defined comprehensive executive search strategy indicating the ability to provide regional and/or national recruitment searches. (*If regional, indicate specific regions and territory for recruitment searches*)
- Ability to provide salary recommendations based on years of experience and current market analysis
- Provide DEI (Diversity, Equity, and Inclusion) pool of talent
- Leveraging a robust research function
- Full transparency into the talent search process (to include but not limited to)
 - The “Milestone” (when 3 to 5 vetted candidates are discovered within the first 45 days of the search)
 - Candidate Response Rate
 - Candidate Engagement Rate
 - Elimination Reason Trends
 - Total Days to Close
- Ability to perform an informed and targeted search utilizing innovative technology
- Capabilities to grow with the Member’s as their needs evolve supporting the entire lifecycle
- Well-defined Service Level Agreements (SLAs) to measure and track the level of service provided by firm
- Firm ability to place all advertising on behalf of E&I Member
- Firm ability to coordinate all candidate travel arrangements
- Firm’s ability to provide a not to exceed “All-Inclusive Fee”

These would include things within the supplier's control that are easily trackable like; record retention metrics, qualifications (diversity metrics, staff certifications, etc.), replacement guarantees, time limits, etc.

4.3 Specification Checklist

Proposals must include details for the following as described below:

- 4.3.1 The firm’s overall comprehensive executive search strategy and ability to provide regional and/or national searches.
- 4.3.2 How the firm is able to meet the demands of multiple clients simultaneously.
- 4.3.3 The firm’s understanding of the executive search and recruitment process at the highest of academic levels, including teaching hospitals
- 4.3.4 The firm’s strategies, experience and success in recruiting women and minority candidates, as well as its strategy for attracting diverse pools of applicants
- 4.3.5 A description of the resources available to the firm in conducting searches
- 4.3.6 A description of the types of searches in which the firm specializes.
- 4.3.7 The firm’s contingency plan for the replacement of principles should an emergency arise.
- 4.3.8 The firm’s plan for providing demographic information for affirmative action purposes at the conclusion of the search.
- 4.3.9 A detailed Profile that includes:
 - The number of years that the company or its officers have been engaged in providing comparable services to educational institutions.
 - Information regarding the experience and background of the firm’s principals.
- 4.3.10 Detail of the firm’s experience recruiting candidates for key positions at academic institutions and/or teaching hospitals, including but not limited to: (See 4.2. Category Experience and 4.4. Placement Experience Attachment A for referencing)

- Academic/hospital administration roles
- Philanthropy and development roles
- Information and technology roles
- Student affairs administration roles

4.4 Placement Experience (See 4.4 Placement Experience Attachment A)

Please provide the details of past experience of the following:

- a) Institution (this should include name, size, and type of institution)
- b) Placement designation status
- c) Diversity designation(s)
- d) Placement type
- e) Institutional Reference (Name, Phone and Email)

4.5 Key Performance Indicators

Key Performance indicators applicable include but are not limited to:

- a) **Time to Hire:** Date you find candidate # of days until they accept offer
- b) **Sourcing Channel Efficiency:** # of qualified candidates from a specific source – average # of applicants
- c) **Number of Qualified Candidate:** # of candidates identified/# of those qualified moving to the next stage
- d) **Submit to Interview Ratio:** # of candidates submitted to hiring manger/committee after screening process/#of those interviewed
- e) **Interview to Offer Ratio:** # of interviews / # of offers
- f) **Offer Acceptance Rate:** # of jobs offers / # of accepted offers
- g) **Cost Per Hire:** Total recruiting cost / # of hires
- h) **Quality of Hire:** Pre-hire Metric #1 + Pre-hire Metric #2 + Pre-hire Metric #3 = Total # of Pre-hire Metrics
- i) **Hires to Goal:** # of new hires in period /hiring goal for that period x 100
- j) **Adverse Impact Ratio:** % hired by EEO Group / % hired of highest selection rate x 100
- k) **Candidate Net Promoter Score (NPS):** % of promoters – % of detractors

4.6 No Exclusions

E&I recognizes that any one Respondent may not provide all specialty categories recruitment services and/or product lines. No specialty categories recruitment services and/or product lines, or systems, have been excluded from this RFP. All categories of services, systems, products, and accessories carried in a Respondent's catalog(s), price book(s) or otherwise available by special request are part of this solicitation.

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