COLORADO MESA UNIVERSITY
CMU 21-2715
REQUEST FOR PROPOSALS
FOR
STRATEGIC PLAN FACILITATION AND DEVELOPMENT SERVICES

RFP ISSUE DATE: December 1, 2021
PROPOSAL DUE DATE: December 20, 2021 11:00 MST
ISSUED BY: Suzanne Ellinwood
Purchasing Manager

Electronic Proposals will be accepted until 11:00 AM Mountain Standard Time, December 20, 2021. Any Proposal received after the above indicated time will be returned unopened.

Suzanne Ellinwood, sellinwo@coloradomesa.edu
Colorado Mesa University Purchasing Department
1260 Kennedy Avenue
Grand Junction, CO 81501-3122
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NOTE: To simplify the Colorado Mesa University's review process, the format for all Proposals must be consistent with the format in Section 4, "Offeror's Response Format." In addition, the Offeror Signature Form must be completed and signed by an authorized company representative.
SECTION 1: ADMINISTRATIVE INFORMATION

1. ISSUING OFFICE:
This Request for Proposal (RFP) is issued the State of Colorado acting by and through the Board of Trustees of Colorado Mesa University for the use and benefit of the Facilities Department by the Colorado Mesa University Purchasing Department. The Purchasing Department is the SOLE point of contact concerning this RFP. All communication must be done through the Purchasing Department.

2. OFFICIAL MEANS OF COMMUNICATION:
During the solicitation process for this RFP, all official communication between the Purchasing Department and Offerors will be via postings on the Rocky Mountain Bids System http://www.rockymountainbidsystem.com/ or the Colorado Mesa University's Purchasing website at: http://www.coloradomesa.edu/purchasing/opensolicitations.html. Colorado Mesa University Purchasing Department will post notices which will include, but not be limited to, any modifications to administrative or performance requirements, answers to inquiries received, clarifications to requirements, and the announcement of the apparent winning Offeror. It is incumbent upon Offerors to carefully and regularly monitor either the Rocky Mountain Bids site or the Purchasing website for any such postings.

3. PURPOSE:
This RFP provides prospective Offerors with sufficient information to enable them to prepare and submit proposals for consideration by the Purchasing Department to satisfy the need for expert assistance in the completion of the goals of this RFP.

A. DEFINITIONS
1. In the following RFP the term “University” shall be understood to mean “Colorado Mesa University.”

2. The term “Offeror,” as used herein, shall be understood to mean the individual, company, corporation or firm formally submitting a response to this RFP, and may also be referred to as the “Bidder,” “Vendor” or “Contractor.”

3. The term “Response,” as used herein, shall be understood to mean a written offer to provide goods and/or services in accordance with the general conditions, instruction, and specifications stated herein with the exceptions clearly stated, and may be used interchangeably with the terms “Proposal” and “Bid.”

4. SCOPE:
This RFP contains the instructions governing the proposal to be submitted and the material to be included therein; mandatory requirements which must be met to be eligible for consideration; and other requirements to be met by each proposal.

5. SCHEDULE OF ACTIVITIES

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7. INQUIRIES:
Offerors may make written, e-mail or fax inquiries concerning this RFP to obtain clarification of requirements. No inquiries will be accepted after the date and time indicated in the Schedule of Activities. Offerors shall confirm successful receipt of said inquiries. Inquiries should be directed to the following using the e-mail address:

Suzanne Ellinwood, sellinwo@coloradomesa.edu
Subject Line shall reference Inquiries CMU-21-2715

Response to any Offeror's inquiries will be published as a modification on Rocky Mountain E-Purchasing System and Colorado Mesa University's Purchasing website in a timely manner per the Schedule of Activities. Offerors should not rely on any other statements that alter any specification or other term or condition of the RFP.

8. MODIFICATION OR WITHDRAWAL OF PROPOSALS:
Proposals may be modified or withdrawn by the Offeror prior to the established submission due date and time.

9. PROPOSAL SUBMISSION:
Electronic Proposals must be received on or before the date and time indicated in the Schedule of Activities. Late proposals will not be accepted. It is the responsibility of the Offeror to ensure that the proposal is received by the Colorado Mesa University Purchasing Department on or before the proposal opening date and time.

Proposals shall be sent electronically to sellinwo@coloradomesa.edu

Subject Line shall reference Response to: CMU-21-2715

PROPOSAL DUE: December 20, 2021, 11:00 a.m. MST

The Vendor Signature Form MUST be signed by the Offeror or an officer of the Offeror legally authorized to bind the Offeror to the proposal.

Proposals which are determined to be at a variance with this requirement may not be accepted.

10. BID OPENING:
Due to the complexity of this Proposal, information provided at the bid Opening shall be restricted to the NAME AND NUMBER OF RESPONDERS. Inspection of the Offerors’ proposals will not be allowed until after the notice of intent to award if posted on the Rocky Mountain Bids system.
11. ADDENDUM OR SUPPLEMENT TO REQUEST FOR PROPOSAL:
In the event that it becomes necessary to revise any part of this RFP, an addendum notice will be posted on the Rocky Mountain Bids website, [http://www.rockymountainbidsystem.com/](http://www.rockymountainbidsystem.com/) and the Purchasing website at [http://www.coloradomesa.edu/purchasing/opensolicitations.html](http://www.coloradomesa.edu/purchasing/opensolicitations.html). Offerors shall not rely on any other interpretations, changes or corrections.

12. WRITTEN INQUIRIES AND RESPONSES:
Any explanation desired by an Offeror regarding the meaning or interpretation of any Request for Proposal provision must be submitted in writing and clearly marked with the RFP number and title. Inquiries can be e-mailed to the point of contact for the Request for Proposal; it is incumbent upon the Offeror to verify receipt of written inquiries. Written responses to inquiries will be provided as an addendum to be posted on the Rocky Mountain Bids website, [http://www.rockymountainbidsystem.com](http://www.rockymountainbidsystem.com) and the Purchasing website at [http://www.coloradomesa.edu/purchasing/opensolicitations.html](http://www.coloradomesa.edu/purchasing/opensolicitations.html) on the date shown in the Schedule of Activities.

13. ORAL PRESENTATIONS/SITE VISITS:
The Evaluation Committee may conclude after the completion of the proposal evaluation that oral interviews/presentation and/or demonstrations are required in order to determine the successful Offeror. All Offerors may not have an opportunity to interview/present and/or give demonstrations. The presentation process will allow the Offerors to demonstrate their proposal offering, explaining and/or clarifying any unusual or significant elements related to their proposals. Offeror’s key personnel may be required to participate in a structured interview to determine their understanding of the requirements of this proposal, their authority and reporting relationships within their firm, and their management style and philosophy. Offerors shall not be allowed to alter or amend their proposals.

Detailed notes of oral interviews/presentations and/or demonstrations may be recorded and supplemental information (such as briefing charts, etc.) may be accepted. Additional written information gathered in this manner shall not constitute replacement of proposal contents.

Once oral interviews/presentations and/or demonstrations have been completed Colorado Mesa University reserves the right to make a contract award without any further discussion with the Offerors regarding the proposals received.

Any cost incidental to the oral interviews/presentations and/or demonstrations shall be borne entirely by the Offeror.

14. ACCEPTANCE OF RFP TERMS:
A proposal submitted in response to this RFP shall constitute a binding offer. Acknowledgment of this condition shall be indicated by the signature of the Offeror, or an officer of the Offeror legally authorized to execute contractual obligations. A submission in response to this RFP acknowledges acceptance by the Offeror of all terms and conditions including compensation, as set forth herein. An Offeror shall identify clearly and thoroughly any variations between its proposal and the University’s RFP. Failure to do so shall be deemed a waiver of any rights to subsequently modify the terms of performance, except as outlined or specified in the RFP.

15. PROTESTED SOLICITATIONS AND AWARDS:
Any actual or prospective Offeror or contractor who is aggrieved in connection with the solicitation or award of a contract may protest to the University Purchasing Manager. The protest shall be submitted in writing within seven working days after such aggrieved person knows, or should have known, of the facts giving rise thereto. [Reference Colorado Revised Statutes (CRS) Section 24-109-101 et. seq., 24-109-201 et. seq., and Colorado Procurement Rules R-24-109-101 through R-24-109-206.]

With regard to the emphasized language above, it is important for Offerors to note that a challenge to the solicitation’s requirements or specifications should be made within 7 days of when the protested item is known. In other words, if you believe that the solicitation contains a requirement you want to protest, the
protest should be submitted within the 7 day time period, even if that means it is filed during the time the solicitation is still open.

As noted in the paragraph above, announcement of the apparent winning Offeror will be made via a posting on the Rocky Mountain Bids system. The requirement for timely submission of any protest (7 working days) will begin on the first working day following posting of the award notice on Rocky Mountain Bids.

16. CONFIDENTIAL/PROPRIETARY INFORMATION:
Any restrictions of the use or inspection of material contained within the proposal shall be clearly stated in the proposal itself. The Offeror must state specifically what elements of the proposal are to be considered confidential/proprietary. Confidential/proprietary information must be readily identified, marked and separately packaged from the rest of the proposal. Co-mingling of confidential/proprietary and other information is NOT acceptable. Neither a proposal in its entirety, nor proposal price information will be considered confidential/proprietary. Any information that will be included in any resulting contract cannot be considered confidential.

17. RFP RESPONSE MATERIAL OWNERSHIP:
All material submitted regarding this RFP becomes the property of Colorado Mesa University. Proposals may be reviewed by any person after the "Notice of Intent to Make an Award" letter has been issued, subject to the terms of § 24-72-201 et.seq. CRS, as amended, Public (open) Records.

18. PROPOSAL PRICES:
Estimated proposal prices are not acceptable. Proposal prices will be considered to be your best and final offer, unless otherwise stated in the RFP. The proposal price will be considered in determining the apparent successful Offeror.

19. DISCUSSION WITH RESPONSIBLE OFFERORS AND REVISIONS TO PROPOSAL:
Discussions may be conducted with responsible Offerors who submit proposals determined to be reasonably susceptible of being selected for award; for the purpose of clarification to assure full understanding of, and responsiveness to, the solicitation requirement. Offerors shall be accorded fair and equal treatment with respect to any opportunity for discussions and revision of proposals, and such revisions may be permitted after submissions and prior to award, for the purpose of obtaining best and final offers. In conducting discussions, there shall be no disclosure of any information derived from proposals submitted by competing Offerors.

The University reserves the right to hold discussions with Offerors who have been found to be in the competitive range, such discussions may result in the University conducting Best & Final Offers.

20. SELECTION OF PROPOSAL:
As described within the RFP, an Evaluation Committee will review and score offers submitted and make a recommendation for award. The selection will be for award to the responsible Offeror whose proposal is determined to be most advantageous to the University. The Purchasing Department, after review and approval of the evaluation committee’s written recommendation, will notify all Offerors via a posting on the Rocky Mountain Bids system of the results of the RFP evaluation. The posting will be an announcement of the "Notice of Intent to Make an Award" will name the apparent successful Offeror.

21. AWARD OF CONTRACT:
The award will be made to the responsive and responsible Offeror whose proposal, conforming to the RFP, will be the most advantageous to Colorado Mesa University, price and other factors considered. A contract must be completed and signed by all parties concerned. In the event the parties are unable to enter into a contract, the State may elect to cancel the "Notice of Intent to Make an Award" letter and make the award to the next most responsible Offeror.
22. **ACCEPTANCE OF PROPOSAL CONTENT:**
The contents of the proposal (including persons specified to implement the project) of the successful Offeror will become contractual obligations if acquisition action ensues. Failure of the successful Offeror to accept these obligations in a contract may result in cancellation of the award and such Offeror may be removed from future solicitations. Under these conditions, the University reserves the right to enter into negotiations with the next ranking bidder on the same terms and conditions as set forth in the Request for Proposal.

23. **STANDARD CONTRACT:**
The successful bidder will enter into a consultant contract with the University. The Consultant Contract contains certain required provisions for doing business with the State of Colorado, labeled “Special Provisions.” The Special Provisions are required to be contained in every state contract without modification or exception. The Offeror shall include with its proposal a separate page entitled “Exceptions to Contract Terms,” setting forth in detail all objections and exceptions it may have to any other terms and provisions contained in the special provisions, and failing such, shall be deemed to have accepted such terms and provisions. Failure to accept the University’s standard contract provisions may result in cancellation of the award. The State Contract, including the Special Provisions, is attached electronically as a separate PDF document.

24. **RFP CANCELLATION:**
The University reserves the right to cancel this Request for Proposal at any time, without penalty.

25. **OWNERSHIP OF CONTRACT PRODUCTS/SERVICES:**
Proposals, upon established opening time, become the property of the Colorado Mesa University. All products/services produced in response to the contract resulting from this RFP will be the sole property of the Colorado Mesa University unless otherwise noted in the RFP. The contents of the successful Offeror’s proposal will become contractual obligations.

26. **INCURRING COSTS:**
Colorado Mesa University is not liable for any cost incurred by Offerors prior to issuance of a legally executed contract. No proprietary interest of any nature shall accrue until a contract is awarded and signed by all concerned parties.

27. **MINORITY-OWNED/WOMAN-OWNED PARTICIPATION:**
It is the State’s intent to achieve the goals of the Governor’s Executive Orders D0055-87 and D0005-94 regarding minority/woman-owned businesses. Offerors are reminded it is illegal to discriminate.

28. **NON-DISCRIMINATION:**
The Offeror shall comply with all applicable state and federal laws, rules and regulations involving non-discrimination on the basis of race, color, religion, national origin, age or sex.

29. **REJECTION OF PROPOSALS:**
The University reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal or all items proposed if deemed in the best interest of Colorado Mesa University.

30. **PARENT COMPANY:**
If an Offeror is owned or controlled by a parent company, the main office address and parent company’s tax identification number shall be provided in the proposal. The tax identification number provided must be that of the Offeror responding to the RFP.

31. **NEWS RELEASES:**
News releases pertaining to this RFP shall NOT be made prior to execution of the contract without prior written approval by the University.
32. CONTRACT CANCELLATION:
The University reserves the right to cancel, for cause, any contract resulting from this RFP by providing timely written notice to the offeror.

33. CERTIFICATION OF INDEPENDENT PRICE DETERMINATION:

1. By submission of this proposal, each Offeror, and in the case of a joint proposal, each party thereto, certified as to its own organization, that, in connection with this procurement:
   a. The prices in this proposal have been arrived at independently, without consultation, communication, or agreement, for the purpose of restricting competition, as to any matter relating to such prices with any other Offeror or with any competitor;
   
   b. Unless otherwise required by law, the prices which have been quoted in this proposal have not been knowingly disclosed by the Offeror and will not knowingly be disclosed by the Offeror prior to opening, directly or indirectly to any other Offeror or to any Competitor; and
   
   c. No attempt has been made or will be made by the Offeror to induce any other person or firm to submit or not to submit a proposal for the purpose of restricting competition.

2. Each person signing the Invitation for Bid form of this proposal certified that:
   
   a. He is the person in the Offeror's organization responsible within that organization for the decision as to the prices being offered herein and that he has not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above; or
   
   b. He is not the person in the Offeror's organization responsible within that organization for the decision as to the prices being offered herein but that he has been authorized in writing to act as agent for the persons responsible for such decision in certifying that such persons have not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above, and as their agent does hereby so certify; and he has not participated, and will not participate, in any action contrary to (1)(a) through (1)(c) above.

3. A proposal will not be considered for award where (1)(a), (1)(c), or (2) above has been deleted or modified. Where (1)(b) above has been deleted or modified, the proposal will not be considered for award unless the Offeror furnishes with the proposal a signed statement which sets forth in detail the circumstances of the disclosure and the head of the agency, or his designee, determines that such disclosure was not made for the purpose of restricting competition.

34. CONFLICTS OF INTEREST:
The holding of public office or employment is a public trust. A public officer or employee whose conduct departs from his fiduciary duty is liable to the people of the State. Rules of conduct for public officers and state employees:

1. Proof beyond a reasonable doubt of commission of any act enumerated in this section is proof that the actor has breached his fiduciary duty.

2. A public officer or a state employee shall not:
   
   a. Engage in a substantial financial transaction for his private business purposes with a person whom he inspects, regulates, or supervises in the course of his official duties;
   
   b. Assist any person for a fee or other compensation in obtaining any contract, claim, license, or other economic benefit from his agency;
c. Assist any person for a contingent fee in obtaining any contract, claim, license, or other economic benefit from any state agency, or

d. Perform an official act directly and substantially affecting to its economic benefit a business or other undertaking in which he either has a substantial financial interest or is engaged as counsel, consultant, representative, or agent.

3. A head of a principal department or a member of a quasi-judicial or rule-making agency may perform an official act notwithstanding paragraph (d) of subsection (2) of this section if his participation is necessary to the administration of a statute and if he complies with the voluntary disclosure procedures under CRS section 24-18-110.

4. Paragraph (c) of subsection (2) of this section does not apply to a member of a board, commission, council, or committee if he complies with the voluntary disclosure procedures under CRS 24-18-110 and if he is not a full-time state employee. Reference CRS 24-18-108.

35. TAXES:
Colorado Mesa University, as purchaser, is exempt from all federal excise taxes under Chapter 32 of the Internal Revenue Code Registration No. 84-6000546) and from all state government use taxes (Ref. Colorado Revised Statutes Chapter 39-26.114(a)). Our Colorado State Sales Tax Exemption Number is 98-03693. Seller is hereby notified that when materials are purchased in certain political subdivisions the seller may be required to pay sales tax even though the ultimate product or service is provided to the State of Colorado. This sales tax will not be reimbursed by the State.

36. ASSIGNMENT AND DELEGATION:
Except for assignment of antitrust claims, neither party to any resulting contract may assign or delegate any portion of the agreement without the prior written consent of the other party.

37. AVAILABILITY OF FUNDS:
Financial obligations of the State payable after the current fiscal year are contingent upon funds for that purpose being appropriated, budgeted and otherwise made available. In the event funds are not appropriated, any resulting contract will become null and void, without penalty to Colorado Mesa University and the State of Colorado.

38. BID BONDS/SECURITY:
If the RFP so states, a bid security in an amount equal to 5% of your proposal shall be furnished if your proposal exceeds $50,000. If the specifications so state, it may be required for projects of less than $50,000. Not required for this Solicitation.

39. CONTRACTOR’S PERFORMANCE BOND:
Not required for this Solicitation.
40. STANDARD INSURANCE REQUIREMENTS:

A) The Offeror shall obtain, and maintain at all times during the term of this contract, insurance in the following kinds and amounts:

1) Workers’ Compensation Insurance as required by state statute, and Employer’s Liability Insurance covering all of offeror’s employees acting within the course and scope of their employment.

2) Commercial General Liability Insurance written on ISO occurrence form CG 00 01 10/93 or equivalent, covering premises operations, fire damage, independent offerors, products and completed operations, blanket contractual liability, personal injury, and advertising liability with minimum limits as follows:
   a) $1,000,000 each occurrence;
   b) $2,000,000 general aggregate;
   c) $2,000,000 products and completed operations aggregate; and
   d) $50,000 any one fire.

3) Automobile Liability Insurance covering any auto (including owned, hired and non-owned autos) with a minimum limit as follows: $1,000,000 each accident combined single limit.

B) Colorado Mesa University shall be named as additional insured on the Commercial General Liability and Automobile Liability Insurance policies (leases and construction contracts will require the additional insured coverage for completed operations on endorsements CG 2010 11/85, CG 2037, or equivalent). Coverage required of the contract will be primary over any insurance or self-insurance program carried by the University.

C) The Insurance shall include provisions preventing cancellation or non-renewal without at least 30 days prior notice to the University.

D) The offeror will require all insurance policies in any way related to the contract and secured and maintained by the offeror to include clauses stating that each carrier will waive all rights of recovery, under subrogation or otherwise, against the University, its agencies, institutions, organizations, officers, agents, employees and volunteers.

E) All policies evidencing the insurance coverages required hereunder shall be issued by insurance companies satisfactory to the University.

F) The offeror shall provide certificates showing insurance coverage required by this contract to the University within 7 business days of the effective date of the contract, but in no event later than the commencement of the services or delivery of the goods under the contract. No later than 15 days prior to the expiration date of any such coverage, the offeror shall deliver the State certificates of insurance evidencing renewals thereof. At any time during the term of this contract, the University may request in writing, and the offeror shall thereupon within 10 days supply to the University, evidence satisfactory to the University of compliance with the provisions of this section.

G) Notwithstanding subsection A of this section, if the offeror is a “public entity” within the meaning of the Colorado Governmental Immunity Act CRS 24-10-101, et seq., as amended (“Act”), the offeror shall at all times during the term of this contract maintain only such liability insurance, by commercial policy or self-insurance, as is necessary to meet its liabilities under the Act. Upon request by the University, the contractor shall show proof of such insurance satisfactory to the University.
41. INDEPENDENT CONTRACTOR CLAUSE:
All personal service contracts must contain the following clause:

"THE CONTRACTOR SHALL PERFORM ITS DUTIES HEREUNDER AS AN INDEPENDENT
CONTRACTOR AND NOT AS AN EMPLOYEE. NEITHER THE CONTRACTOR NOR ANY AGENT OR
EMPLOYEE OF THE CONTRACTOR SHALL BE OR SHALL BE DEEMED TO BE AN AGENT OR
EMPLOYEE OF THE STATE. CONTRACTOR SHALL PAY WHEN DUE ALL REQUIRED
EMPLOYMENT TAXES AND INCOME TAX WITHHOLDING, SHALL PROVIDE AND KEEP IN FORCE
WORKER’S COMPENSATION (AND SHOW PROOF OF SUCH INSURANCE) AND UNEMPLOYMENT
COMPENSATION INSURANCE IN THE AMOUNTS REQUIRED BY LAW, AND SHALL BE SOLELY
RESPONSIBLE FOR THE ACTS OF THE CONTRACTOR, ITS EMPLOYEES AND AGENTS."

42. INDEMNIFICATION:
To the extent authorized by law, the contractor shall indemnify, save and hold harmless the University, its
employees and agents, against any and all claims, damages, liability and court awards including costs,
expenses, and attorney fees incurred as a result of any act or omission by the contractor or its
employees, agents, subcontractors, or assignees pursuant to the terms of the contract resulting from this
RFP.

43. VENUE:
The laws of the State of Colorado, U.S.A. shall govern in connection with the formation, performance and
the legal enforcement of any resulting contract. Further, Title 24, C.R.S. as amended, Article 101 through
112 and Rules adopted to implement the statutes govern this procurement.
SECTION 2: BACKGROUND, OVERVIEW AND GOALS

1. Background
   
   Colorado Mesa University
   
   A comprehensive university in Grand Junction, Colorado on the cusp of its 100 year anniversary, Colorado Mesa University provides exceptional educational opportunities on a state-of-the-art campus. As western Colorado's largest university, CMU serves students on its main campus in Grand Junction, its satellite campus in Montrose, its career and technical campus, Western Colorado Community College and via online offerings.

   Colorado Mesa University serves as the primary intellectual and cultural center of western Colorado and promotes the exchange of ideas that are of regional, national and international importance. Founded in 1925, it’s a dynamic university enrolling more than 11,000 students at the technical certificate, associate, baccalaureate and graduate levels.

   At the heart of the CMU experience is an integrative and experiential approach to higher education that encourages students to think differently and empowers them to challenge assumptions. CMU brings students together with expert scholars and thinkers from different disciplines to make connections between ideas and gain the skills to solve the unstructured, complex problems they’ll encounter in life. Our focus is on providing quality academic programs, built on a strong liberal arts core that support students’ interests and regional employment needs, as well as technical programs that respond to vocational workforce demands.

2. Overview

   Colorado Mesa University (“University”) is soliciting proposals in response to this solicitation for Selection of a qualified Strategic Plan Facilitation and Development Consultant (Consultant) to aide campus leaders in developing and facilitating a process to engage stakeholders and develop a new Strategic Plan that will guide the University in its academic pursuits and development.

3. Goals

   A copy of the current Colorado Mesa University Strategic Plan can be found at:
   
   https://www.coloradomesa.edu/president/documents/StrategicPlan01-2016.pdf

   The goal of this process is to engage in a thorough process to engage all needed stakeholders in order to update the strategic plan and cast a vision for university success over the next defined planning period.

4. Schedule and Timeline

   University leaders wish to select a Consultant early in calendar year 2022 in order to begin gathering needed data, metrics and information in preparation for thorough on and off campus stakeholder engagement during the 2022-23 academic year (beginning in Fall of 2022). Upon conclusion of all needed engagement exercises, campus leaders will collaborate with Consultant to craft a new strategic plan to be adopted by the Colorado Mesa University Board of Trustees in May of 2023.
SECTION 3: STATEMENT OF WORK

In evaluating responses to this RFP, the University is interested in partnering with a strategic planning consultant that possess a varied skill set to succeed in developing a strategic plan. Please describe your abilities and expertise in the following areas:

- Exceptional group facilitation experience, including examples
- Planning and organization
- Critical thinking
- Strong decision-making skills
- Relationship management
- Prioritization
- Exceptional written and verbal communication, including examples

When working with a college, university or other similar complex organization, describe the process you follow for identifying problems, critical issues and designing a solution. How long will it take your team to study the situation, gather and analyze information, and finally develop recommendations to present to the University?

When working with universities and other institutions to develop and help reach their strategic goals, describe how you achieve the following:

- Maximize student outcomes
- Manage various budgetary pressures
- Advise upon other organizational issues
- Recommend improvements to university policies and programs
- Identify specific problems (and design custom solutions to those problems)

Your proposal response should include demonstrated knowledge and ability to advise on topics such as enrollment management, diversity and inclusion, student engagement & success, campus planning, strategic planning, and leadership development.

Additionally, proposal responses must address these other items of interest.

1. Customize the process aligned with University specific needs.
2. Identify an appropriate number of strategic goals.
3. Ensure inclusion of all stakeholders (faculty, community, parents, students, alumni, staff, etc.) and ensure all have an opportunity to provide structured input.
4. Involve members of the Board of Trustees as an integral part of the process providing input, support and commitment.
5. Facilitate conversations with stakeholders.
6. Support the strategic planning committees and subcommittees in gathering and organizing internal and external environmental assessments.
7. Help communicate the work of the strategic planning committee and subcommittees and the outcomes of their work.
8. Keep the process on track, on time and on budget.
9. Review existing planning and assessment documents, including the most recent strategic plan (see above).
10. Align Strategic Plan process (including outreach efforts and data analysis) to existing activities and systems.
11. Employ both Quantitative and Qualitative Data to guide University in identifying priority goals/strategies.
12. Outline a process to ensure implementation and evaluation of the plan with measurable key performance-based indicators/metrics.
13. Describe the process for renewal of the vision, mission and beliefs.

The Proposal must identify the following:
14. The consultant’s experience with higher education, emphasizing facilitating strategic planning processes.
15. How the consultant/facilitator will use technology to streamline the process (i.e., electronic input), as well as sufficient opportunities for face-to-face input (i.e., public forums, focus groups) including any technology support needs University would be expected to provide.
16. Costs must be total and inclusive.
17. Team members, including both the lead consultant, and team members, along with their curriculum vitae.
18. How timeline outlined above will be aligned with University needs.

Deliverables will include:
19. Facilitating large group meetings with diverse stakeholders
20. Needs Assessment
21. Methodology/Dissemination
22. Assessment of Representative Stakeholders’ Input and Perspectives
23. Preliminary Report and Recommendations
24. Final Written Report, and Multi-Year Vision and Strategic Plan

SECTION 4: OFFEROR’S RESPONSE FORMAT

Offeror’s response format shall be structured to respond to each item listed in Section 3: Statement of Work. Responses should be prepared to bring clarity to the Offeror’s proposal and subsequent evaluation process, simply and economically, in a straightforward and concise manner to fully describe the Offeror’s ability to meet the requirements of the RFP.

The following describes the minimum information that is required from interested Offerors. If references are made in your response to accompanying materials, specify document names and pages where the information can be found. Failure to comply with the required format and content of all required information may, at the discretion of the University, result in the proposal being eliminated from further consideration.

THIS INFORMATION MUST BE SUBMITTED.

A. COVER LETTER
The Offeror shall furnish a cover letter to introduce the company, its qualifications, provide a general overview of the Offeror’s proposal.

B. EXPERIENCE AND CAPABILITIES
1. Provide an overview of your firm and the type/breadth of services you offer.
2. Tell us about the individual(s) who will be assigned to the CMU account, their areas of expertise and where they are located. Who will be the University’s single point of contact?
3. Provide a list of five (5) current clients…. Include the dates of the relationship, client name and address. Include the contact name, phone number and email address of the individual we have permission to contact if necessary.
C. **FINANCIAL CONSIDERATIONS**

1. The total proposal cost shall reflect the full Scope of Services defined herein inclusive of all associated cost for Labor, Material, Supplies, Equipment, delivery, insurance, taxes, overhead, and profit.

H. **ADDITIONAL INFORMATION**

Provide any additional information believed to be relevant to the RFP and your firm’s capability to provide the services requested.

I. **EXCEPTIONS TO THE RFP TERMS AND CONDITIONS**

Any and all exceptions to the provisions contained in this RFP must be clearly and specifically stated in this section. Failure to specifically address an exception shall be conclusively deemed a waiver of any such objection. Failure or refusal to execute the contract documents as accepted, within the required time period stated in this RFP, shall be cause for immediate cancellation of the award.

J. **AUTHORIZED AGENT**

The attached signature page, Appendix B, must be completed by an authorized agent of the firm and attached to the proposal.

K. **RELATED SERVICES**

Please indicate any other related services your firm can provide to the University

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**SECTION 5: EVALUATION PROCESS & CRITERIA**

A. **Evaluation Process**

All proposals submitted in response to this RFP will be reviewed for responsiveness prior to referral to the evaluation committee. The evaluation of proposals and the selection of Contractor will be based on the information provided in the proposal. University may consider additional information if University determines the information is relevant.

The Committee’s evaluations will be based on all available information, including qualification statements, subsequent interviews, if necessary, reports, discussions, reference checks, and other appropriate checks. The highest rated proposer(s) evaluated by the Committee may be invited to make an oral presentation of their written proposal to the Committee.

Each response will be scored by each member of the Evaluation Committee in each of the following areas outlined in Section 4, Offeror’s Response Format and each area will be rated on a scale from 1-10 with 10 being the highest rating and 1 being the lowest rating:

B. **Evaluation Criteria**

   a) Firm’s Experience (similar projects, size & complexity). Experience of Principal Account Manager assigned to Colorado Mesa University
   b) Proposed Approach & Methodology
   c) References and Past Performance
d) Proposal Fee and Pricing

While a numerical rating system may be used to assist the evaluation committee in selecting the competitive range (if necessary) and making the award decision, the award decision ultimately is a business judgment that will reflect an integrated assessment of the relative merits of the proposals using the factors and any relative weights if established.

**Basis of Award**

The technical factors will be assessed based on the soundness of the Offeror’s approach and understanding of the requirements. The experience and/or demonstrated capabilities factor will be assessed by considering the extent to which the qualifications, experience, and past performance are likely to foster successful, on-time performance. Assessments include a judgment concerning the potential risk of unsuccessful or untimely performance and the anticipated amount of University involvement necessary to ensure timely, successful performance. The selection is ultimately a business judgment that will reflect an integrated assessment of the relative merits of proposals using the factors identified above. The University reserves the right to reject any (or all) proposal(s) that pose in the judgment of the University, unacceptable risks of unsuccessful or untimely performance, unacceptable University resource requirements, or costs exceeding the budget constraints.

Failure of the Offeror to provide any information requested in the RFP may result in disqualification of the proposal and shall be the responsibility of the Offeror.

**SECTION 6: REQUIRED SUBMITTALS**

- Offeror Signature Form
- All items required in Section 3, Statement of Work and Section 4, Offeror’s Response Format.
OFFEROR SIGNATURE FORM
CMU 21-2715 Strategic Planning Services

Proposals Due: December 20, 2021 Time: 11:00 am MST

Email Proposal to: Colorado Mesa University - Purchasing Office
Contact/Attention: Suzanne Ellinwood
1260 Kennedy Avenue               (970) 248-1337
Grand Junction, CO 81501                   sellinwo@coloradomesa.edu

Electronic proposals properly marked with Bid No., Due Date and Time, subject to the conditions herein stipulated in accordance with specifications set forth herein, will be accepted in the CMU Purchasing Office, 1260 Kennedy Avenue, Grand Junction, CO 81501 prior to the due date and time set forth above. All prices shall include shipping, handling and delivery, FOB Destination, Colorado Mesa University, Grand Junction, CO.

The Offeror herein noted has carefully examined all components, instructions and requirements of this Quote and proposes to furnish the services described herein. The undersigned hereby agrees to provide strategic planning services on behalf of Colorado Mesa University in accordance with the specifications, requirements, terms and conditions contained herein for the rates quoted. The undersigned certifies that all representations, certifications and statements within its proposal are true and accurate as of the date of the proposal submission. The person signing this Offeror Signature Form certifies that he/she is a duly authorized officer for the Offeror, and that the information and any materials enclosed with this proposal represent the capability of the company to provide the services described in the quote.

This Offeror Signature Form page MUST be signed for proposal to be valid.

COMPLETE THE FOLLOWING:

Federal Employer ID No. ___________________________ Date:_______________________________
Company Name: ________________________________________________________________________________________
Authorized Signature: ________________________________________________________________________________________
Typed/Printed Name: ________________________________________________________________________________________
Title: ________________________________________________________________________________________
Address: ________________________________________________________________________________________
City/State/Zip: ________________________________________________________________________________________
Phone No.: ___________________________ Fax No.: ___________________________

Contact for Clarifications:
Name: ________________________________________________________________________________________
Title: ________________________________________________________________________________________
Phone No.: ___________________________ Fax No.: ___________________________
Email: ________________________________________________________________________________________

Offeror Acknowledges Receipt of Addendum No. ____, ____, ____, ____ (Addendums MUST be acknowledged)