

Request for Proposal (RFP)
Consulting Services Related to Campus wide Strategic Planning for
University of California at Riverside
December 16, 2008

Revised and reissued ~ January 2, 2009

The University of California, Riverside is seeking sealed proposals from qualified firms for Professional University Strategic Planning Services.

Proposals are to be received in the Purchasing Department, University of California, Riverside at the following address **by 5:00 PM PST on January 15, 2009** in accordance with the instructions contained herein.

University of California, Riverside

Purchasing Department

3401 Watkins Drive

Riverside, CA 92521

Attn: Russ Lewis, Director of Materiel Management

Institutional Background Information

The University of California at Riverside (UCR), one of 10 universities within the University of California system, is often recognized as one of the most ethnically diversity research universities in the United States. In addition to the diverse student population, the University has also increased its student enrollment throughout the campus by 70% over the last 10 years. The University also enjoys a growing research enterprise, with several institutes and centers. The University is in the midst of tremendous growth, including the construction and development of several facilities on campus, the approval for the newest medical school and school of public policy within the UC system, and the recent addition of a Chancellor, Timothy P. White.

As part of the UCR's regular process of evaluating its strategic priorities and market positioning, the leadership of UCR has decided to develop a new strategic plan to guide the organization over the next decade.

Objectives of the Strategic Planning Process

The Chancellor's office has been meeting for a period of time and has identified some possible approaches to the strategic planning process. As part of our initial meetings, we have concluded that a Strategic Planning Committees should be formed from various stakeholder groups.

Objectives of the Consulting Engagement

The objective of this consulting engagement is to manage and facilitate the strategic planning process that will develop a strategic plan leading to strategic decision making, more efficient operations, and ultimately alignment of resources with strategic objectives.

The specific objectives include:

- Revisions to the UCR's current mission and vision statements, as appropriate
- A definition of UCR's extended community, taking into consideration population trends, competition and educational needs
- An evaluation of current and future University models of engagement with communities-at-large
- The creation of a multi-year enrollment and financial analysis which examines area demographic and enrollment trends
- An analysis of UCR's key schools and research institutes to understand the University's relative positioning amongst its competitors, as well as the organization's current operational strengths and weaknesses
- Input and participation from UCR's various stakeholders including the faculty, staff, Administration, and key community leaders
- An analysis of UCR's financial position to determine the investments needed to fund its future and the improvements to its financial position required to access the capital markets at reasonable terms. Evaluation of appropriate business models and strategies to generate additional revenue

Deliverables

In addition to the project management and facilitation, the consultant will provide a written report/strategic plan to the Steering Committee that will include:

- A summary of meetings and activities of the engagement
- Documentation of recommendations for UCR's mission, vision, and strategic imperatives
- Rationale of each recommendation

- Documentation of agreed-upon strategic plan and strategic imperatives
- High level implementation plan for each strategic imperative

Qualifications

The following is a list of qualifications UCR expects its consultant to possess:

- Demonstrated, substantial professional experience in providing similar consulting assistance to universities or other institutions
- Experience in facilitating strategic visioning sessions with different constituency groups
- Experience in analyzing and evaluating the financial arrangements within large, complex organizations/universities that include both public and private entities

Expected Time Frame

The following represents the timetable for the proposal process:

- Release of RFP – December 16, 2008
- Written proposals due for evaluation – January 15, 2009, by 5p.m. (pst)
- Interview of finalists – January 30, 2009
- Engagement to start on February 9, 2009 and conclude on January 2010

Proposal Requirements

Proposals shall include the following:

- A brief executive summary
- General company information
- A description of similar projects involving strategic plans in the past 5 years
- As identification and detailed background of individuals to work this engagement and commitment of these individuals for completion of the engagement.

- A description of management approach and methodology proposed to be employed to achieve the objectives of this engagement.
- Fees and estimated expenses broken out by phase/stage of engagement
- Proposed team members must disclose any real or potential conflicts of interest.
- References from past engagements

Other Items

Proposals should be strictly limited to the items listed in the RFP. Consultants will be required to sign a binding confidentiality agreement.

All questions should be provided in writing to Les Martin at the address below. Both the question and the answers will be provided, in writing, to all qualified potential consultants who have expressed interest in this RFP.

BASIS FOR AWARD/PROPOSAL EVALUATION

Proposals will be evaluated based on the total information requested and supplied, an evaluation of past performance, and a determination of the proposer's ability to serve the University in this scope requirement. The University shall consider only those proposals from financially responsible organizations presently engaged in the business of professional University Strategic Planning Services which have the capacity to provide the scope of work contained herein.

Proposals will be evaluated on the following basis:

1. General quality and adequacy of response
 - a. Completeness
 - b. Grasp of the scope of work
 - c. Responsiveness to RFP
2. Technical approach
 - a. Clarity and reasonableness of proposed method of providing services
 - b. Demonstrated knowledge required to provide scope of work described herein
3. Demonstrated expertise in this particular field
 - a. Qualifications of personnel to be assigned to the project

- b. Past experience in this area of professional services
 - c. Qualifications of sub-consultants, if any
- 4. Ability to complete project in a timely manner
 - a. Availability of qualified staff to support the project
 - b. Sufficient personnel to be assigned to the project
- 5. Cost

Representatives of the University reserve the right to require an oral presentation by the top finalists, prior to award of any contract resulting from the RFP. Proposals will be evaluated using a weighted point scoring system.

UNIVERSITY CONTACT PERSONS

1. For contractual and RFP submittal questions:

Russ Lewis

Director of Materiel Management

Phone: (951) 827-3009

FAX : (951) 827-5392

E-mail: russell.lewis@ucr.edu

2. For scope of work questions regarding this RFP:

Tim Ralston

Associate Vice Chancellor

Phone: (951) 827-2432

FAX : (951) 827-2402

E-mail: timothy.ralston@ucr.edu

ADDITIONAL TERMS AND CONDITIONS OF THIS RFP

- A. The University's Director of Materiel Management is the only one authorized to amend any portion of this RFP, in any respect, by an oral statement, or to make any representation or interpretation in conflict with the provisions. If necessary, supplemental information in addendum form will be emailed to all prospective proposers. Failure of any proposer to receive such addendum or interpretation shall not relieve such proposer from any obligation under their proposal as submitted. All addenda so issued shall become part of this RFP.
- B. Proposer certifies neither he/she, his/her close relative nor his/her employer is employed by the University (compensatory or otherwise).
- C. Proposers submitting proposals in response to this RFP do so at their own expense. All proposals become the property of UCR. Contents of proposals shall be held in confidence until a notice of award. Thereafter, proposal information will be available in compliance with Federal and State public disclosure laws. Trade secrets and other confidential business information, properly identified by the proposal, will be held in strictest confidence where there is no violation of public disclosure laws.
- D. Proposer shall complete the enclosed University's Business Information Form and submit with Proposal.
- E. Attached Appendix A will be incorporated in the award of a purchase order contract resulting from this RFP.
- F. Proposers shall abide by and promote the following University of California nondiscrimination and Affirmative Action Statement:
The University of California prohibits discrimination against or harassment of any person employed by or seeking employment with the University on the basis of race, color, national origin, religion, sex, physical or mental disability, medical condition (cancer-related or genetic characteristics), ancestry, marital status, age, sexual orientation, citizenship, or status as a covered veteran (special disabled veteran, Vietnam era veteran, or any other veteran who served on active duty during a war or in a campaign or expedition for which a campaign badge has been authorized). The University of California is an affirmative action/equal opportunity employer. The University undertakes affirmative action to assure equal employment opportunity for minorities and women, for persons with disabilities, and for special disabled veterans, Vietnam era veterans, and any other veterans who served on active duty during a war or in a campaign or expedition for which a campaign badge has been authorized. University policy is intended to be consistent with the provisions of applicable State and Federal law. Inquiries regarding the University's equal opportunity policies may be directed to: Dr. Gladys Brown, Director, Affirmative Action Office, 339 Surge Building, (951) 827-5604.