

ITN #56-001

CONTRACT

THIS CONTRACT (the "Contract") is made and entered into on as of the date fully entered below (the "Effective Date"), by and between **THE FLORIDA INTERNATIONAL UNIVERSITY BOARD OF TRUSTEES ("FIU")** and **GREENWOOD/ASHER & ASSOCIATES, INC.**, a FLORIDA corporation, whose address is 42 Business Center Dr., Suite 206, Miramar Beach, Florida 32550 (the "Contractor").

RECITALS

WHEREAS, FIU requested solicitation responses for Competitive Solicitation ITN No.56-001 ("ITN #56-001") to provide the following goods and/or services: Search Firm services (the "Services");

WHEREAS, the Contractor submitted a solicitation response for ITN #56-001 to perform the Services ("Contractor's Solicitation Response"), which was accepted by FIU.

NOW, THEREFORE, in consideration of the mutual promises and agreements made herein and intending to be legally bound hereby, the parties hereto agree as follows:

1. **Term.** This Contract commences on the Effective Date and will continue for an initial term of three (3) years (the "Initial Term") and may be renewed in writing by the parties for two (2) additional, two (2) year term(s) (each, a "Renewal Term"). The Initial Term and the Renewal Term(s) shall be known, collectively, as the "Term."

2. **Contract.** The Contractor will provide to FIU the Services pursuant to the terms and conditions described in the following: the Competitive Solicitation for ITN #56-001 (including Addendum 1), attached hereto as Exhibit I and incorporated herein by reference; the Contractor's Solicitation Response, attached hereto as Exhibit II and incorporated herein by reference; and the Contractor's Best and Final Offer, attached hereto as Exhibit III and incorporated herein by reference. In the event of conflict between or among terms and conditions contained in the foregoing documents with regards to the Services, such documents shall govern in the following order of precedence: first, this Contract; second, Exhibit I (the Competitive Solicitation for ITN #56-001, including Addendum 1); third, Exhibit III (the Contractor's Best and Final Offer); and fourth, Exhibit II (the Contractor's Solicitation Response).

3. **Payment.** The Contractor shall provide the Services to FIU pursuant to the pricing set forth in Exhibit III. The Contractor shall submit invoices for fees or other compensation for services or expenses in detail sufficient for a proper pre-audit and post-audit. FIU will make payment in accordance with FIU Regulation FIU-2202, which states the Contractor's rights as a vendor and FIU's responsibilities concerning interest penalties and time limits for payment of invoices. Upon receipt, FIU has five (5) business days to inspect and approve the goods or services. If a payment is not issued within **forty (40) days of receipt** of a proper invoice and receipt and inspection and approval of the goods and services, FIU will pay to the Contractor, in addition to the amount of the invoice, an interest penalty at the rate established pursuant to Florida

ITN #56-001

Statutes §55.03(1), provided the interest penalty is in excess of one dollar (\$1.00). A Vendor Ombudsman has been established within the Office of Business and Finance. The duties of this individual include acting as an advocate for vendors who may be experiencing problems in obtaining timely payment from FIU. The Vendor Ombudsman may be contacted at (305) 348-2101.

The Contractor shall cooperate with FIU and provide specific records and/or access to all of the Contractor's records related to the Contract for purposes of conducting an audit or investigation. FIU will provide Contractor with reasonable notice of the need for such records or access.

4. **Assignment/Modification of Contract.** This Contract may not be assigned or modified by either party except as agreed to in writing and signed by both parties. The Contract shall be binding upon the parties' successors and assigns.

5. **Sovereign Immunity.** Nothing in this Contract shall be construed as an indemnification of the Contractor by FIU or as a waiver of sovereign immunity beyond that provided in Florida Statutes §768.28.

6. **Governing Law; Venue.** This Contract is governed by the laws of the State of Florida and exclusive venue of any actions arising out of this Contract shall be in the courts in Miami-Dade County, Florida.

7. **Relationship of the Parties.** The Contractor is an independent contractor, and neither the Contractor nor the Contractor's employees, agents, or other representatives shall be considered FIU's employees or agents. The Contractor shall not use FIU's name, trademarks, logos, or marks without FIU's prior written approval. The Contractor represents and warrants that it is not on the Convicted Vendor List (see Fla. Stat. § 287.133(2)(a)). Each party hereby assumes any and all risk of personal injury and property damage attributable to the willful or negligent acts or omissions of that party and the officers, employees, and agents thereof. The Contractor also assumes such risk with respect to the willful or negligent acts or omissions of the Contractor's subcontractors or persons otherwise acting or engaged to act at the instance of the Contractor in furtherance of the Contractor fulfilling the Contractor's obligations under the Contract.

8. **Compliance with Public Records Law.** FIU is subject to applicable public records laws as provided by provisions of Florida Statutes Chapter 119, and FIU will respond to such public records request without any duty to give the Contractor prior notice. If Contractor is a "contractor" as defined under Section 119.0701, Florida Statutes, Contractor shall comply with all applicable public records laws. Specifically, Contractor shall: (1) keep and maintain public records required by FIU to perform the service; (2) Upon request from FIU's custodian of public records, provide FIU with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided under that section, or as otherwise provide by law; (3) Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if Contractor does

ITN #56-001

not transfer the records to FIU; and (4) upon completion of the contract, transfer, at no cost, to FIU all public records in possession of Contractor or keep and maintain public records required by FIU to perform the Service. If Contractor transfers all public records to FIU upon completion of the contract, Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Contractor keeps and maintains public records upon completion of the contract, Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to FIU, upon request by FIU's public records custodian, in a format that is compatible with FIU's information technology systems. If FIU receives a request for public records, and FIU does not possess such records, FIU shall immediately notify Contractor of such request, and Contractor must provide them to FIU or allow the records to be inspected or copied within a reasonable time. If Contractor does not comply with the request for records, FIU shall enforce the terms of the contract, and Contractor may be subject to civil action under Section 119.0701, Florida Statutes, and the penalties outlined under Section 119.10, Florida Statutes. FIU may unilaterally cancel the Agreement for Contractor's refusal to allow public access to all public records that were made or received in conjunction with the Agreement. This provision shall survive the expiration or earlier termination of the Agreement. **IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT (305) 348-1377, BY EMAIL AT rose.nicholson@fiu.edu, OR BY MAIL at 11200 SW 8 ST., GL 460, MIAMI, FLORIDA 33199.**

9. **Annual Appropriations.** FIU's performance and obligation to pay under the Contract is subject to and contingent upon the availability of funds appropriated by the Florida Legislature or otherwise lawfully expendable for the purposes of such Contract for the current and future periods. FIU will give notice to the Contractor of the non-availability of funds when FIU has knowledge thereof. Upon receipt of such notice by Contractor, Contractor is entitled to payment only for those services performed and accepted by FIU prior to the date such notice is received.

10. **Taxes.** FIU is a tax immune sovereign and exempt from the payment of sales, use or excise taxes. The Contractor shall pay all personal property taxes on leased equipment and all taxes based upon net income.

11. **Travel Expenses.** Contractor shall not charge FIU for any travel expenses, meals, and lodging unless otherwise provided in this Contract and FIU's prior written approval of the expenses has been obtained. Under such circumstances, Contractor is authorized to incur the agreed to travel expenses which will be payable by FIU, but only to the extent permitted in Florida Statutes § 112.061 and the FIU Policy 1110.060 Travel: University Travel Expense Policy, which is available at http://policies.fiu.edu/record_profile.php?id=548&s=travel. Contractor is responsible for any expenses in excess of these prescribed amounts.

12. **Force Majeure.** No default, delay or failure to perform on the part of the either party shall be considered a default, delay or failure to perform otherwise chargeable, hereunder, if such default, delay or failure to perform is due to causes beyond either party's reasonable control including, but not limited to, strikes, lockouts or inactions of governmental authorities; epidemics; acts of terrorism; war; embargoes; fire; earthquakes; hurricanes; acts of God; or default of common carrier. In the event of such default, delay or failure to perform, any date or times by which either party is otherwise scheduled to perform shall be extended automatically for a period of time equal in duration to the time lost by reason of the excused default, delay or failure to perform.

13. **Indemnification.** The Contractor is responsible for its performance under the Contract. The Contractor will indemnify and hold harmless, assume liability for and defend, the State of Florida, the Florida Board of Governors, FIU and their officers, employees, and agents, from and against any and all actions, claims, liabilities, assertions of liability, losses, costs and expenses, which may arise in any manner or are alleged to have arisen, from the acts, omissions or wrongful conduct of Contractor or Contractor's officers, employees, agents, guests, patrons, licenses, invitees or subcontractors in connection with or related to their operations, activities, and/or occupancy or use of the FIU premises in performance of the Contract. This provision shall survive termination or expiration of the Contract.

14. **Trademark or Copyright Infringement.** Contractor will, at its expense, defend any suit brought against FIU and will indemnify FIU against an award of damages and costs made against FIU by settlement or final judgment of a court that is based on a claim that the use of the Contractor's product infringes a trademark or copyright of a third party; provided that FIU notifies Contractor in writing of the suit or any claim of infringement within thirty (30) days after receiving notice thereof, and further provided that Contractor is permitted to control the defense in any litigation or settlement of the suit. FIU will provide reasonable cooperation in the defense of the suit at Contractor's expense. Such defense and indemnity shall survive termination or expiration of the Contract.

15. **Confidentiality of Information.** The Contractor acknowledges and agrees that (a) all documents, studies, materials and information furnished to the Contractor by FIU or FIU's affiliates in connection with this Contract and (b) all reports, studies, plans, deliverables, strategies, materials and other documents and information developed or prepared for FIU in connection with this Contract or which reflect any of the documents, studies, materials or information furnished to the Contractor by FIU (the materials described in (a) and (b) are collectively referred to as the "Information") are and shall remain at all times confidential, proprietary, and the sole property of FIU. The Contractor agrees that it shall not use the Information and will not share the Information with its employees, except as necessary to the Contractor's performance under this Contract, and the Contractor shall at all times comply with all state and federal laws governing the use and/or safe-keeping of confidential and/or personally identifiable information. The Contractor shall not disclose Information to third parties unless it obtains FIU's written consent to such disclosure.

In the event the Contractor is required by subpoena or other judicial or administrative process or by law to disclose such records, the Contractor shall (i) provide FIU with prompt notice

ITN #56-001

thereof; (ii) consult with FIU on the advisability of taking steps to resist or narrow such disclosure; (iii) furnish only that portion of the information that is responsive to the request; (iv) comply with the requirements of all state and federal privacy laws applicable to the Information, which may include but is not be limited, to Florida Public Records laws, FERPA, the Gramm-Leach Bliley Act, the Federal Trade Commission's Red Flags Rule (which implements Section 114 of the Fair and Accurate Credit Transactions Act of 2003); and (v) reasonably cooperate with FIU in any attempt that FIU may make to obtain an order or other reliable assurance that confidential treatment will be accorded the records. Upon termination of this Contract or upon request by FIU, the Contractor shall promptly return the Information to FIU. Notwithstanding the foregoing, if FIU will share or provide access to protected health information or "PHI" to FIU for the Contractor to perform this Contract, FIU and the Contractor will enter into a separate business associate agreement which will govern the confidentiality and non-use obligations of the Contract regarding the PHI (in lieu of this provision). This provision shall survive the termination or expiration of this Contract.

16. **Lobbying.** Contractor is prohibited from using funds provided under this Contract for the purpose of lobbying the Legislature or any official, officer, commission, board, authority, council, committee, or department of the executive branch or the judicial branch of state government.

17. **Termination for Cause.** Either party may terminate this Contract for cause by giving the other party thirty (30) calendar-days written notice setting forth with specificity the basis for the termination of the Contract for cause. For purposes of this Contract, "cause" shall mean the failure by either party to: (i) provide the goods or perform the services within the time specified in this Contract; or (ii) adhere to any terms of this Contract.

18. **Notice.** Any notices required under this Contract shall be sent via U.S. Mail, return receipt requested, to the parties at the following addresses:

Notices to Contractor:

Dr. Jan Greenwood
President and Partner
Greenwood/Asher & Associates, Inc.
42 Business Center Dr., Suite 206
Miramar Beach, FL 32550

Notices to FIU:

Purchasing Director
FIU- Purchasing Services Department
Campus Support Complex, CSC 411
11200 S.W. 8th Street
Miami, Florida 33199

With copy to:

Dr. Betty Turner Asher
Vice President and Partner
Greenwood/Asher & Associates, Inc.
42 Business Center Dr., Suite 206
Miramar Beach, FL 32550

With copy to:

Florida International University
Office of the General Counsel
Modesto A. Maidique Campus
11200 S.W. 8th Street, PC 511
Miami, Florida 33199

19. **Termination without Cause.** FIU may terminate this Agreement by giving Contractor at least ninety (90) days prior written notice of termination. FIU shall only be liable for payment of goods received and/or services rendered and accepted by FIU prior to the effective date of termination.

20. **No counterparts; facsimile signatures allowed.** This Contract may not be executed in counterparts. The Contract, along with any and all Exhibits, may be executed and delivered by facsimile signature by any of the parties to the other parties; to the extent permissible under Florida law, a facsimiles signature shall have the same legal force and effect as an original signature and the receiving party may rely on the receipt of such document so executed and delivered by facsimile signature as if the original had been received.

21. **Compliance with Laws.** In the performance of this Contract, Contractor shall, at its own expense, at all times during the Term, comply with all applicable federal, state, and local laws, rules, regulations, and ordinances and all other governmental requirements. Contractor acknowledges and agrees that Contractor has and will at all times during the Term maintain all governmental permits, licenses, consents, and approvals necessary to perform its obligations under this Contract.

22. **Clarifications/negotiated points (if any) are:** Please see the exceptions.

THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK.

ITN #56-001

IN WITNESS WHEREOF, the duly authorized representatives of the parties have affixed their signatures, effective on the Effective Date first written above.

FOR THE CONTRACTOR:

GREENWOOD/ASHER ASSOCIATES, INC.

BY: 

Jan Greenwood, President

NAME & TITLE:

DATE: 6/23/2016

FOR FIU:

**THE FLORIDA INTERNATIONAL UNIVERSITY
BOARD OF TRUSTEES**

BY: 

NAME & TITLE: Dr. Jaffus Hardrick
Vice President of Human Resources

DATE: 6/23/16

By: 
Wendi Appelbaum
Assistant General Counsel

Date: 6-21-16

EXHIBIT I

SUBMIT RESPONSE TO: FLORIDA INTERNATIONAL UNIVERSITY PURCHASING SERVICES MODESTO A. MAIDIQUE CAMPUS 11200 SW 8 th Street CAMPUS SUPPORT COMPLEX – CSC 411 MIAMI, FL 33199 (305) 348-2161	INVITATION TO NEGOTIATE COVER DOCUMENT ("Solicitation") ITN No. 56-001
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RESPONSE OPENING (Date and Time): December 17, 2015 @ 2:00PM EST	SOLICITATION TITLE: <i>Search Firms</i>
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Please refer to the above address for Response opening location

POSTING OF BID TABULATION AND NOTICES

The bid tabulation and notices of a decision or intended decision and recommended award related to this Competitive Solicitation will be posted at the Florida International University Purchasing website- <http://finance.fiu.edu/purchasing> and will remain posted for a period of 72 hours. Failure to file a protest in accordance with Florida Board of Governors' ("BOG") regulation 18.002, or failure to post the bond or other security as required in BOG regulations 18.002 and 18.003, shall constitute a waiver of protest proceedings.

PURCHASING REPRESENTATIVE	<i>Chandra Nix, Procurement Manager</i>
VENDOR'S LEGAL NAME	
VENDOR'S MAILING ADDRESS	
VENDOR'S CITY, STATE, ZIP	
VENDOR'S WEB ADDRESS	
VENDOR'S E-MAIL ADDRESS	
VENDOR'S FACSIMILE	
VENDOR'S TELEPHONE NUMBER	
VENDOR'S TOLL FREE NUMBER	

By signing this document, I certify that this solicitation response ("response") is made without prior understanding, agreement, or connection with any corporation firm, or person submitting a response for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this competitive solicitation and certify that I am authorized to sign this solicitation response for the Vendor and that the Vendor is in compliance with all requirements of the competitive solicitation, including but not limited to, certification requirements. In submitting a solicitation response to the University, the Vendor offers and agrees that if the solicitation response is accepted, the Vendor will convey, sell, assign, or transfer to the State of Florida all rights, title and interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of Florida for price fixing relating to the particular commodities or services purchased or acquired by the State of Florida. At the State's discretion, such assignment shall be made and become effective at the time the University tenders final payment to the Vendor.

<hr/> AUTHORIZED SIGNATURE (MANUAL)
<hr/> PRINT NAME AND TITLE
<hr/> DATE SIGNED



**FLORIDA
INTERNATIONAL
UNIVERSITY**

**FLORIDA INTERNATIONAL UNIVERSITY
COMPETITIVE SOLICITATION NUMBER: ITN 56-001**

**FOR
Search Firms**

TABLE OF CONTENTS

1.0 OVERVIEW..... 1

1.1 Statement of Objective 1

1.2 Calendar of Events 1

1.3 Scope of Work and Deliverables..... 2

1.4 Solicitation Response 4

1.5 Evaluation Points..... 8

1.6 Definitions 9

1.7 FIU Environment..... 9

2.0 PROCESS..... 10

2.1 Authorized FIU Representative/ Vendor’s Submission of Solicitation Response 10

2.2 Vendor Communications and/or Inquiries 11

2.3 Restricted Vendor Communications 11

2.4 Addenda 11

2.5 Protests 11

2.6 Delivery and Labeling of Sealed Solicitation Response 12

2.7 Required Solicitation Response Format 12

2.8 Economy of Presentation 12

2.9 Solicitation Responses Must be in Ink or Typed..... 13

2.10 Vendor’s Signature 13

2.11 Complete Responses Required 13

2.12 Use of Forms 13

2.13 Errors or Omissions 13

2.14 Solicitation Response Validity Period..... 13

2.15 Solicitation Response Opening..... 13

3.0 SELECTION PROCESS, EVALUATION PROCESS AND CRITERIA 14

3.1 Selection process 14

3.2 Cash Discounts 14

3.3 Tie Responses..... 15

3.4 Contract Award 15

3.5 Posting of Intent to Award/Protest 16

3.6 Commencement of Work 16

3.7 Alternate Brands or Equivalent Products 16

4.0 SPECIFIC TERMS..... 16

5.0	GENERAL TERMS	18
5.1	Insurance	18
5.2	Workers' Compensation.....	18
5.3	Software Warranty and Back up	20
5.4	Services and Warranty	20
5.5	Safety.....	20
5.6	Compliance With Laws and Regulations.....	20
5.7	Public Records Laws; Trade Secrets Certification.....	21
5.8	Parking	22
5.9	Public Entity Crimes	22
5.10	Waiver of Rights and Breaches	22
5.11	Conflict of Interest.....	22
5.12	Covenant Against Commissions, or Brokerage and Contingent Fees.....	23
5.13	Use of Contract by Other Governmental Agencies	23
5.14	Disposition of Solicitation Responses	23
5.15	Licensing Requirements	24
5.16	Subcontractors	24
5.17	Small Business Minority Enterprise (SBME) Reporting	24
5.18	Equal Opportunity Statement	24
5.19	Vendor's Employment of Unauthorized Aliens	25
APPENDIX I	26
APPENDIX II	30
APPENDIX III	33
APPENDIX IV	39

Attached is Appendix V Sample Addendum.

1.0 OVERVIEW

1.1 Statement of Objective

This is a competitive solicitation for consulting services to enable the Florida International University Board of Trustees (FIU) to enter into a contract with multiple vendors to assist with providing candidates for open positions in a Higher-Education environment. The purpose of establishing multiple agreements is so that University departments will have the opportunity to evaluate resulting Agreements for each qualified firm and select the firm that best suits its needs. The initial term of the contract will be for three (3) years, and the University will have the option to renew for two (2) additional, two (2) year terms. Renewals are not automatic. Successful Vendor(s) performance is expected to begin on the effective date the agreement which is the last date signed by either party.

This contract will enable the State of Florida's State University System (SUS), to obtain the services of qualified and experienced Vendors. **All references to FIU or the Florida International University shall be considered to mean any or all of the SUS Universities in the Florida SUS system.** The Successful Vendor(s) will be able to provide the services as required by any of the Universities. The SUS spend for the period from July 1, 2013 through June 30, 2015 has been approximately **\$4.4M**, for search firm services. The utilization of the contract will not be required exclusively. Firms selected for award will be placed in a pool for search services on an as-needed basis. This contract is not a guarantee of work.

1.2 Calendar of Events

Unless otherwise revised by an Addendum to this competitive solicitation, the dates and times by which stated actions will be taken or completed are listed below. If FIU determines, in its sole discretion, that it is necessary to change any of these dates and times, it will issue an Addendum to this competitive solicitation which will be posted on the Website. All times listed are Eastern Standard Time (EST).

Date/Time	Action
11/23/2015	Competitive solicitation advertised and released.
12/02/2015	Last Day for FIU to receive communications and/or inquiries from Vendors regarding the competitive solicitation via email to Authorized FIU Representative at nixc@fiu.edu before 2:00 pm (" Inquiry Deadline Date ").
12/9/2015	FIU will respond to inquiries and requests for clarifications by posting an Addendum on the Website.
12/17/2015	Deadline for FIU to receive solicitation responses from Vendors at 2:00 p.m. (" Solicitation Response Due Date ") and solicitation response opening at 2:00 p.m. (<i>Note: Any solicitation responses received after the Solicitation Response Due Date and time shall be deemed non-responsive.</i>)

The Purchasing Department will post notice of changes to any of the above dates, and will provide advance notice of any pre-proposal meetings and evaluation committee meetings related to this competitive solicitation by posting the information on the FIU Purchasing Services Department’s Website at <http://finance.fiu.edu/purchasing> (“the Website”). Vendor is solely responsible for checking the Website periodically in order to verify whether any changes have been made to the Calendar or whether any meetings are scheduled to take place. FIU reserves the sole discretion over the conduct of any meetings and the extent, if any, that those attending may participate in such meetings.

1.3 Scope of Work and Deliverables

The Successful Vendor’s performance of the Services shall be in accordance with the following items listed below:

1. Provide assistance to Florida International University in the recruitment, selection and placement of individuals of superior qualifications in categories that may include the following in Table 1 below:

Table 1

<u>Search Categories</u>
Intercollegiate Athletics
Higher Education Senior Level
Academic Senior Level
Museum
Development/Fundraising/Foundation
Information Technology
Physician/Medical/Healthcare/Nursing
Financial/Business Finance/Accounting
Human Resources
Legal
Facilities/Construction/Engineering
Public Relations/Marketing/Governmental Affairs
Sciences
Arts

2. The Services to be provided by Contractor for these Engagements may include, but are not limited to the following: meeting with FIU to gather information; collaborating with FIU to develop an overall search plan of action, timeline and recruitment materials; and designing an interview and selection process; assisting in creation or updates to the Position profiles; assisting in determining how to advertise the Position and assisting with placement of the advertisements; actively recruiting applicants, screening applicants; tracking and managing prospect and candidate information throughout the search process, comparing potential candidates; assisting FIU in conducting background checks and

coordinating reference checks on selected candidates; providing technical, administrative, and logistical support for the search and interview process, site visits, final selection, contract negotiations, transition considerations, and follow-up; and collaborating with FIU throughout the search; and any other services as described in the Agreement. The University is requesting assistance from search firms to augment search efforts for direct hires.

3. Provide documented expertise and significant value in recruiting senior-level executive management positions in or for higher education, medical center leadership, and physician specialties.
4. Provide searches with utmost sensitivity in these highly visible and closely monitored positions.
5. Ability to establish partnerships and clarify expectations with University search committees and Human Resources. Collaborate with the University in developing an overall search plan of action, timeline, recruitment materials and design interviews and selection process. The selected search firm(s) will use its network to establish direct contact with a highly selective and diverse list of college and university officials in appropriate positions and other similarly situated individuals in private industry and the not-for-profit sector. The consulting firm will also establish contact with individuals in its data bank and will communicate with other professionals, committees and organizations in the professional area at issue.
6. Provide assistance in preparation and submission of advertisements for higher education and healthcare publications.
7. Provide highly qualified candidates regardless of gender, ethnicity, and age.
8. Ability to ensure that during the interview process, candidates feel the University's process remains confidential and sensitive.
9. Coordinate candidate flights and any other travel arrangements.
10. Conduct Employment Searches in Compliance with the Office of Federal Contract Compliance Regulations. The Selected Firms agree to conduct all employment searches pursuant to this ITN in accordance with the Office of Federal Contract Compliance regulations. For each position for which an employment search is conducted, the Selected Firms will compile applicant demographic and disposition information ("information") for each applicant who meets the Office of Federal Contract Compliance Definition of an Internet Applicant and will maintain this information in a Microsoft Excel file ("record"). The record will include, at a minimum, Applicant Number or Name, Gender, Race and Ethnic Identification (Based on EEO reporting category definitions), Applicant Status, and Working Title of the position for each applicant. Applicants must be requested to self-identify their gender and race and ethnic identification.

11. When services are needed, the University will contact one or more of the firms from the pool under the contract for the applicable area of expertise before assigning a particular search. Final assignment will be via Contract Addendum (**See Appendix V – Sample Addendum**), outlining the scope of services, agreed upon fees, and timetable for the particular search. Being part of the pool is not a Guarantee of Work.
12. Once the potential candidates have been identified, the consultant shall conduct candidate evaluations based upon the candidate’s resume and a screening telephone call to ascertain interest, salary requirement and potential match with requirements.
13. The Selected Firms further agree to provide the University with an electronic copy of the record for each employment search within ten business days of the termination of the employment search. The Selected Firms will maintain all records for any employment search resulting in a hire for a period of three years.

All goods and services proposed must meet or exceed the specifications as of the date the Competitive Solicitation Responses are due, unless specifically stated as otherwise in the Competitive Solicitation documents.

1.4 Solicitation Response

Each Vendor shall organize its solicitation response to provide the following information in order to assist FIU in the selection, evaluation and award process.

- Tab 1 - **Appendix I** Conditions and Requirements, completed and signed, along with Vendor’s and any specific requests for changes to terms and conditions, if any.

The Vendor must initial the designated items, in **APPENDIX I**, indicating that the Vendor understands and agrees to the terms and conditions as provided in this competitive solicitation. **If the Vendor wants to request additional language or specific changes to the terms and conditions, Vendor must specifically do so in Vendor’s solicitation response and include such requests with APPENDIX I. Requests for additional language or requests for revisions to language in this ITN document must be included in their entirety as part of Vendor’s solicitation response under Tab 1 for consideration by FIU. In addition, any documents incorporated by reference in the requests for additional language or request for revisions and any and all forms FIU will need to fill out, prepare or submit to Vendor if awarded the contract must be included in Vendors’ solicitation response.**

Please be advised that FIU, as a State university, must adhere to applicable laws and regulations and therefore certain terms and conditions may not be altered.

- Tab 2 - Contact information, including name(s), title(s), email address(es), mailing address(es) and phone number(s) for the individual(s) responsible for Vendor’s proposal and negotiation during this process. As well as contact information for the

individual(s) who should receive any notices related to this contract if awarded to Vendor.

Tab 3 - Corporate Governance Documents, including Vendor's W9 form and Vendor application, available on the FIU Purchasing website at http://finance.fiu.edu/purchasing/2vendor_forms.html, and a Certificate of Good Standing from Vendor's State of Incorporation, if other than Florida.

Tab 4 - **Vendor Experience and Qualifications**

- a. Company Established
- b. The history of the firm, including a listing of principals and firm locations. Include the names of companies that have been incorporated into your firm. Relevant dates should be included as well.
- c. President/Company Executive Officer
- d. Describe your firm's experience conducting searches in higher education or healthcare. Describe experience in any specialty areas where you believe your firm has unique expertise, including but not limited to Intercollegiate Athletics, Museums, Development/Fundraising/Foundation, Information Technology, Financial/Business Finance/Accounting, Human Resources, Legal, Facilities/Construction/Engineering, Public Relations/Marketing/Governmental Affairs, Sciences, and/or the Arts.
- e. Provide the qualifications of senior professionals in your firm that are likely to be assigned to University searches. Define who will be primarily responsible and have final authority over decisions made in the search of candidates.
- f. Provide an organizational chart with lines of authority for those individuals that will be directly involved in this contract.
- g. Provide at least four references where similar Services to institutions of higher education or healthcare have been provided within the past four years. Include the name of the firm/organization, date of last search closure, the complete mailing address, and the name, telephone number and email address of the contact person.
- h. Provide a list of successful filled positions in the past four years, including the client name, contact information and position(s) filled.

Tab 5 - **Search Process.**

- a. Describe the firm's search process, including the level and type of participation by the principals/partners. Indicate how you would propose to conduct an effective, timely national search for senior and mid-level administrators and academics at the University. Indicate how your firm would propose to conduct an effective, timely national search for the specialty positions noted. Include a model timeline. Lastly, discuss your methodology in searching for 'hard-to-fill' senior and mid-level positions.
- b. State firm's capabilities in providing assistance during the interview process. Examples of assistance to include but not be limited to: assistance with correspondence between applicants, nominators and nominees, and coordinate interviews of internal and external prospects and the University. Provide a

- University dedicated website with password protection so that resumes are available to search committees at all times.
- c. Describe in detail the process by which your company verifies all education degrees of candidates. Provide detail on coordination of obtaining credit/financial background check and litigation background check.
 - d. Describe how firm handles candidate reference checks.
 - e. State the firm's internal screening methodology that produces the most viable candidates (video conference/in person/telephone, etc.). Provide examples of external screening tools in providing possible past controversies with which a candidate has been associated.
 - f. Provide to the University a salary comparison of the position among peer institutions early in the process.
 - g. Develop and provide the University a timeline for each candidate from search initiation and establishment of expectations through candidate selection, negotiation, and search completion. The timeline should include milestones, activities and deliverables along the interviewing process.
 - h. Provide a full list of successful recruiting conclusions and resulting positions by title and institution of higher education or healthcare including any successful positions among the specialty fields noted.
 - i. Describe how the firm complies with the Final Rule for Section 503 of the Rehabilitation Act

Tab 6 - Financial Proposal

- a. What is your firm's proposed fee for providing the Services? Innovation in fee proposals may set your firm apart from the competition.
 - Would firm consider a fixed fee regardless of the final compensation provided to the successful candidate?
 - Another possible option among others would be to propose a sliding scale, fixed price fee schedule based on final salary package.
 - What expenses are billed to the client?
 - Will there be any mark-up on expenses?
 - Describe in detail the expenses for which it would seek reimbursement.
- b. Vendor should include a fee structure and terms, including provisions for the following:
 - State the fee structure for a successful candidate's voluntary or involuntary termination within the first year of employment.
 - The University's early termination of a search prior to position being filled.
 - Vendor's procedures for a failed search where the firm is unable to provide an adequate pool of candidates.
 - Vendors should provide any price incentive packages for example multiple searches, etc.
 - Vendors should provide fee schedule for all services requested.
- c. Describe how the University will be charged. Include any additional discounts available for early payment of invoices.

- d. Describe how the University will benefit from cost savings by accepting the firm's proposal.
- e. What are the firm's payment terms? The Successful Vendor may indicate payment terms of less than 40 days so long as those terms also contain a cash discount for early payment. For example: "5% 15/Net 40" would correspond to a 5% discount if paid in 15 days, otherwise net 30. The University will compute discounts from the date of completion of services, or from the date the correct invoice is received in Accounts Payable, whichever is later. The University will take the cash discount if payment is made within the specified time frame. Unless alternate payment terms, with cash discounts, are proposed by the Successful Vendor(s), invoices submitted to the University by the Successful Vendor(s) will be paid on a Net 40 days after receipt and approval of the corresponding invoice.
- f. State the firm's capability for accepting electronic payments through Automated Clearing House (ACH) and/or purchasing card, SUA and provide any additional discounts that may result from paying electronically.
- g. Disclose any other fees that may be incurred by the university.

Tab 8 - The completed and signed competitive solicitation cover document, along with completed and signed Addendum Acknowledgement Forms, if any. The Vendor shall complete, sign and date the cover document, but shall not alter the language provided in this competitive solicitation document or the Addendum(a) in any way; any such alterations are void.

Tab 9 - Information regarding alternate brands or equivalent products being offered by Vendor, if any.

Tab 10- Information regarding subcontractors (list of subcontractors with services to be provided by each and amount Vendor will pay to each; Vendor's certification that subcontractors are appropriately licensed and registered with the State of Florida).

Tab 11 - **Appendix II**, completed, signed and dated.

Tab 12 - If applicable, **Appendix IV** - Affidavit of Trade Secret Certification completed and signed by a high level officer of the Vendor as to applicable trade secrets contained in the Vendor's documents; Vendor must segregate and clearly mark all documents certified in Appendix IV and include such documents in this section (tab) of Vendor's proposal.

Tab 13 - **Insurance** - letter or certificate from Vendor's insurer.

Tab 14 - Vendor's Services and Warranties, if applicable.

Tab 15- Disclosures regarding: (a) Vendor employees having employment relationship with FIU, State of Florida or any Florida State Agencies AND/OR (b) any FIU

or State employee(s) owning an interest of 5% or more of Vendor's company or its affiliates or branches.

Tab 16- Additional information requested in the competitive solicitation and/or addenda, if applicable.

Tab 17- Additional pertinent information Vendor would like to provide.

1.5 Evaluation Points

The evaluation criteria and points are provided below.

Table A –

Criteria	Max Points
Vendor Experience and Qualifications	45
Search Process	35
Financial Proposal	20
Evaluation of Solicitation Responses Point Total	100

1.5.1 Evaluation Criteria

1.5.1.2 Vendor Experience and Qualifications

Vendor's proposal should show evidence that they have the qualifications and experience to perform the scope of services and deliverables outlined in this ITN. The area(s) of expertise for which your firm is proposing to provide services in **Section 1.3 item#1, Table 1. Search Categories** of this ITN document. Proposals will be evaluated base on the information provided in **Section 1.4, Tab 4 Vendor Experience** as it relates the **Scope of Services and Deliverables** outlined in **Section 1.2 of the ITN document**.

1.5.1.3 Search Process

A detailed description of your firm's philosophy and approach in conducting searches outlined in **Section 1.4, Tab 5 Search Process**.

1.5.1.4 Financial Proposal

Vendor should provide clear answers to the questions provided in **Section 1.4, Tab 6 Financial Proposal**. Vendor should provide a fee schedule that outlines all services requested.

1.6 Definitions

“**Authorized FIU Representative**” means the FIU Purchasing representative assigned to handle all Vendor communications related to this competitive solicitation. (See Section 2.1)

“**Contract**” means the formal bilateral agreement signed by the representatives of FIU and the Successful Vendor which will incorporate this competitive solicitation, including those terms and conditions in **Appendix III**, and the Vendor’s solicitation response.

“**Successful Vendor**” or “**Contractor**” means a firm or individual who is awarded a contract under this competitive solicitation.

“**Vendor**” means a proposer who submits a timely solicitation response to this competitive solicitation.

“**Direct Costs**” includes fees associated with travel, report reproduction, copying and supplies, research, phone/video/telecommunications, out-of-pocket expenses, and express mail.

“**Indirect Costs**” includes fees associated with candidate’s travel expenses (with evidence of receipts), advertising, background checks, and subscription fees for advertising.

“**Employment Date**” means the date upon which the hired employee begins work with FIU.

“**Website**” means the FIU Purchasing Services Department’s website at <http://finance.fiu.edu/purchasing>.

The words “**shall**”, “**must**”, or “**will**” are equivalent and indicate mandatory requirements or conditions, FIU will not waive Vendor’s material deviation from any of the mandatory requirements.

The words “**should**” or “**may**” are equivalent and indicate very desirable conditions or requirements. Vendor’s deviation from any such desirable conditions or requirements may result in Vendor’s solicitation response being considered as not being in FIU’s best interest.

1.7 FIU Environment

Florida International University is a public, research institution with a student body of nearly 55,000. The university operates two main campuses in Miami-Dade County—namely the Modesto Maidique Campus (MMC) and the Biscayne Bay Campus (BBC). Additionally, FIU also has various other locations which include the Engineering Center, near MMC; the FIU at I-75 in Miramar; the business center in Downtown Brickell; and the Miami Beach Urban Studios (MBUS) on South Beach. For students seeking to learn abroad, the Marriot Tianjin China Program teaches hospitality and tourism management from a center in one of China’s largest cities. In addition to our campuses, FIU operates vital research and cultural centers in South Florida such as the Aquarius undersea research program, The Jewish Museum of Florida-FIU and the Wolfsonian FIU art and history museum in Miami Beach.

The main campus, Modesto A. Maidique Campus, is located in West Dade and occupies 342 acres of land which contributes to the pleasant collegiate atmosphere encompassing an environmental preserve, library, residence halls, sports arena and other wonderful attributes. Biscayne Bay Campus, located on 200 acres on Biscayne Bay, is the hub for FIU's community outreach effort. The Wolfsonian museum uses objects to illustrate the persuasive power of art and design, to explore what it means to be modern, and to tell the story of social, historical, and technological changes that have transformed our world. The Brickell Center houses the College of Business Administration which offers accelerated graduate programs designed specifically to meet the needs and schedules of today's working professionals. The School of International & Public Affairs in the Metropolitan Center focuses on economic development, planning, performance improvement and policy solutions to public, private and non-profit organizations in South Florida. The Lincoln Road Center houses a design studio for 70 graduate students in architecture, interior design, and landscape architecture, a gallery with exhibition and performance space as well as studio space for graduate visual arts students, music practice rooms and an ensemble room that will enhance the College's collaboration with the nearby New World Symphony, and the College of Architecture + The Arts' new Office of Engaged Scholarship and Creative Activities, whose mission will be to use design, visual, performing, and communication arts to engage with the community in collaborative problem-solving. The FIU Center for Engineering and Applied Sciences is a 38-acre urban research and training complex, located on the corner of N.W. 107th Avenue and Flagler Street in West Dade. The building consists of 180,000 usable square feet, housing approximately 500 employees and numerous classes and research labs. The FIU Broward Pines Center is part of an innovative educational complex that offers non-traditional undergraduate and graduate students a distinctive higher educational experience. The structure of the programs offered at the Center has successfully made the lives of working adults easier by scheduling class-time around working hours. Evening and weekend courses, as well as fast-track programs are available to accommodate non-traditional adult students who lead busy lifestyles. We currently have an alumni base of over 180,000 represented in every state and in more than 30 countries around the world.

2.0 PROCESS

2.1 Authorized FIU Representative/ Vendor's Submission of Solicitation Response

The Authorized FIU Representative for this competitive solicitation is:

Chandra Nix, Procurement Manager
FLORIDA INTERNATIONAL UNIVERSITY
MODESTO A. MAIDIQUE CAMPUS
PURCHASING SERVICES DEPARTMENT
CAMPUS SUPPORT COMPLEX – CSC 411
11200 S.W. 8th Street
MIAMI, FLORIDA 33199
EMAIL: NIXC@FIU.EDU

Vendor must submit its sealed solicitation response to the Authorized FIU Representative at the address stated immediately above.

Only those communications that are in writing from the Authorized FIU Representative shall be considered as duly authorized expressions on behalf of FIU.

2.2 Vendor Communications and/or Inquiries

The Vendor shall review this competitive solicitation in its entirety to determine whether FIU's objective, scope of services, conditions and requirements are clearly stated. If Vendor has any questions regarding this competitive solicitation, Vendor must submit such inquiries and requests for clarification via email only to the Authorized FIU Representative at NIXC@FIU.EDU. The Vendor's inquiries or requests for clarification must provide the questions along with the relevant Section(s), Subsection(s), Paragraph(s), and page number(s) of the competitive solicitation being questioned by the Vendor.

FIU will consider only those communications and/or inquiries submitted via email and received by the Authorized FIU Representative on or before the Inquiry Deadline Date specified in **Section 1.2, "Calendar of Events"**. Unless the Authorized FIU Representative specifically requests Vendor to provide additional communications, FIU will not accept or consider any of Vendor's written or other communications and/or inquiries (except solicitation response) received between the Inquiry Deadline Date and the posting of an award, if any, under this competitive solicitation.

To the extent FIU determines, in its sole discretion, to respond to any communications, inquiries or requests for clarification, FIU's response will be made in an addendum to this competitive solicitation and posted on the Website.

FIU will consider the Vendor's failure to communicate inquiries, or request clarifications by the Inquiry Deadline Date to constitute the Vendor's acceptance of all of the conditions and requirements as stated in the competitive solicitation documents.

2.3 Restricted Vendor Communications

From the date of issuance of this competitive solicitation until FIU takes final agency action, the Vendor must not communicate with any FIU employees, Evaluation Committee members or FIU representatives regarding this competitive solicitation or Vendor's solicitation response except as provided herein or as expressly requested by the Authorized FIU Representative. Violation of this restriction may result in rejection of the Vendor's solicitation response.

2.4 Addenda

Purchasing Services will post any Addenda to this competitive solicitation along with Addenda Acknowledgment Forms on the Website. The Vendor's authorized representative must sign and date the Addenda Acknowledgment Form(s), if any, and include the form(s) in the Vendor's solicitation response. All vendors, including known interested vendors, are solely responsible for checking the Website periodically to verify whether any such Addenda and forms were issued.

2.5 Protests

Any Vendor/interested person who is disputing the specifications or is adversely affected by a decision or intended decision concerning this competitive solicitation or contract award and who

wants to protest such specifications, decision, or intended decision shall file a protest in compliance the Florida Board of Governors' regulations. Failure to file a protest in accordance with Florida Board of Governors' regulation 18.002, or failure to post the bond or other security as required in BOG regulations 18.002 and 18.003 shall constitute a waiver of protest proceedings.

2.6 Delivery and Labeling of Sealed Solicitation Response

Vendor's solicitation response to this competitive solicitation shall be prepared in accordance with **Section 1.4, "Solicitation Response"**. Vendor's sealed solicitation response must be received by the Authorized FIU Representative on or before the Solicitation Response Due Date and time specified in **Section 1.2, "Calendar of Events"** at Florida International University, Modesto A. Maidique Campus, Purchasing Services Department, Campus Support Complex, CSC 411, 11200 S.W. 8th Street, Miami, Florida 33199 according to the time clock in FIU's Purchasing Services Department. Vendor may not submit its solicitation response, or amendments to its solicitation response via telephone, facsimile, electronic mail, or telegraph.

If the Vendor elects to mail in its solicitation response package, the Vendor must allow sufficient time to ensure the Authorized FIU Representative's receipt of the solicitation response package by the Solicitation Response Due Date and time. Regardless of the form of delivery, it is the Vendor's responsibility to ensure that the solicitation response package arrives at the Authorized FIU Representative's mailing address (**See Section 2.1**) no later than 2:00 p.m. on the Solicitation Response Due Date. Vendor may not include more than one solicitation response (along with the copies) per sealed envelope.

FIU will accept solicitation responses up to, and no solicitation responses may be withdrawn after, the Solicitation Response Due Date and time. Solicitation responses must be delivered in sealed envelopes with the following information clearly provided on the front of the envelope: The Authorized FIU Representative's name and address as provided in **Section 2.1** and **ITN56-001 Search Firms** and the date and time of the Solicitation Response Due Date. The solicitation response must be submitted in **one (1) original and eight (8) copies**. The document containing the original signature must be marked "**ORIGINAL.**" In addition, Vendor is asked to submit **one (1) courtesy copy** of the solicitation response on CD or PC compatible disk, preferably in .pdf format.

2.7 Required Solicitation Response Format

To facilitate FIU's analysis of Vendor's solicitation response, the Vendor must prepare its solicitation response in accordance with the instructions provided in this competitive solicitation. If Vendor's solicitation response deviates from these instructions, such solicitation response may, in FIU's sole discretion, be rejected.

2.8 Economy of Presentation

The Vendor must use sections and tabs that are clearly identified and also must number and label all parts, pages, figures, and tables in its solicitation response. Vendor should prepare its solicitation response simply and economically, providing a straightforward, concise description of the Vendor's capability to satisfy the conditions and requirements of this competitive solicitation.

(Fancy bindings, colored displays, and promotional material are not desired). Vendor's emphasis should be on completeness and clarity of content. To expedite FIU's evaluation of the solicitation response, it is mandatory that Vendor follow the instructions contained herein. FIU is not liable for any costs incurred by Vendors in responding to this competitive solicitation including, without limitation, costs for any oral presentations requested by FIU.

2.9 Solicitation Responses Must be in Ink or Typed

Vendor's solicitation response must be typed or printed in permanent ink.

2.10 Vendor's Signature

Where Vendor's signature is required, Vendor's solicitation response must contain Vendor's authorized representative's manual signature, in permanent ink, in the space provided. In addition, Vendor's authorized representative must initial all of Vendor's handwritten corrections (additions or deletions) in its solicitation response.

2.11 Complete Responses Required

Vendor must complete and execute this competitive solicitation document, including any addenda, appendices, exhibits, attachments, requested information and response forms and submit them with and as a part of Vendor's sealed solicitation response.

2.12 Use of Forms

If this competitive solicitation includes forms for the submission of information, the Vendor must submit the requested information on the forms, attaching additional pages if necessary, or FIU may reject the Vendor's solicitation response.

2.13 Errors or Omissions

Vendor should examine its solicitation response carefully for any errors prior to submission. The Vendor is solely responsible for the accuracy and completeness of its solicitation response. The Vendor's errors or omissions, if any, are solely at the risk of the Vendor and may be grounds for FIU's finding that the Vendor's solicitation response is non-responsive. In case of Vendor's errors in extensions, the unit price will prevail.

2.14 Solicitation Response Validity Period

Vendor's solicitation response, shall in its entirety, remain valid for 180 calendar days after the Solicitation Response Due Date.

2.15 Solicitation Response Opening

At 2:00 p.m. on the Solicitation Response Due Date, FIU will open all timely submitted solicitation responses for the sole purpose of recording the names of the Vendors submitting solicitation responses.

3.0 SELECTION PROCESS, EVALUATION PROCESS AND CRITERIA

3.1 Selection process

FIU will conduct the following selection process:

- FIU establishes an Evaluation Committee.
- The Evaluation Committee reviews and evaluates the solicitation responses and the Vendor presentations (if any) according to the evaluation criteria and points contained in Table A (See Section 1.5) and develops a ranked order of Vendors.
- The Committee determines a short list of Vendors. Those Vendors selected for the short list will continue in the evaluation process, which may involve vendor presentations, site visits, oral interviews, inspection of the Vendor's facilities, additional written information, internal staff analysis and presentations, feedback from outside consultants, discussions with the Vendors about their capabilities and plans for servicing FIU, and/or any other information deemed helpful to more fully evaluate the Vendor.
- A Negotiation Team may negotiate with the short-listed Vendors. After negotiations have been completed to the satisfaction of the Negotiation Team, or if no negotiations are held, following the initial evaluation, the short listed companies will be given a deadline for submission of a "best and final offer" (BAFO). The negotiation process will stop upon submission of the BAFO. Vendors will not be allowed to make further adjustments to their offer or communicate further with the University, except to respond to requests for clarification from the Evaluation Committee.
- The Evaluation Committee reviews and evaluates the BAFO, solicitation response, taking into account all information gained from any site visits, Vendor presentations, Vendor management team interviews, inspection of the Vendor's facilities, and discussions with the Vendors about their capabilities and plans for servicing FIU (as applicable) according to the evaluation criteria and points contained in Table A (See Section 1.5) and develops a ranked order of Vendors.
- The recommendation of the Evaluation Committee will be submitted to the Director of Purchasing for review and approval and to the **Vice President of Human Resources** or his/her designee with final decision making authority ("University Official") regarding the competitive solicitation for a final decision regarding award.
- The University Official considers the Evaluation Committee's recommendation and determines which Vendor(s) to enter into a Contract with.

3.2 Cash Discounts

The Evaluation Committee will not consider cash discounts for prompt payment when determining the lowest net cost for solicitation response evaluation purposes.

3.3 Tie Responses

When multiple solicitation responses are equal in all respects, FIU will give preference to solicitation responses in the following order: solicitation responses from Vendors that include commodities manufactured in Florida, then from Vendors that are Florida businesses, then Vendors who have a drug-free workplace program, and then Vendors who are foreign manufacturers located in Florida, in determining the contract award, or if those conditions do not exist or are equivalent between two or more solicitation responses, the contract award will be determined by the toss of a coin.

3.4 Contract Award

FIU intends to award a Contract or Contracts resulting from this competitive solicitation to the Successful Vendor(s) whose solicitation response(s) represent the best value to FIU. The Contract will include this competitive solicitation document, and the Successful Vendor's solicitation response, and all the terms and conditions found on the Sample Contract. (The Sample Contract is attached as **APPENDIX III**.) The Contract will also incorporate any clarifications, and if negotiations are conducted, any additional terms and conditions that are negotiated.

- 3.4.1** FIU reserves the right to award a Contract without negotiations with the Vendor; therefore, the Vendor's solicitation response should contain the Vendor's best terms from a cost or price and technical standpoint.
- 3.4.2** FIU reserves the right to make an award on any item or service for a quantity less than the quantity offered, at the unit cost or unit prices offered, unless the Vendor specifies otherwise in the Vendor's solicitation response.
- 3.4.3** Unless otherwise provided in this competitive solicitation, FIU reserves the right to make multiple awards if, after considering the additional administrative costs, it is in FIU's best interest to do so.
- 3.4.4** FIU reserves the right to award the commodity specified and/or the services detailed in this competitive solicitation either in their entirety or in any part thereof, all to the advantage of FIU.
- 3.4.5** FIU may reject all solicitation responses if such action is in FIU's best interest.
- 3.4.6** FIU reserves the right and sole discretion to reject any solicitation response at any time on grounds that include, but are not limited to, Vendor's solicitation response being found to be nonresponsive, incomplete, or irregular in any way; or when Vendor's solicitation response is not in FIU's best interest. FIU may waive informalities and minor irregularities in solicitation responses.

FIU is not obligated to make an award under or as a result of this competitive solicitation. FIU reserves the right to award a contract, to the Vendor(s) submitting a solicitation response that FIU, in its sole discretion, determines is in FIU's best interest.

3.5 Posting of Intent to Award/Protest

The Intent to Award to a Vendor, if any, will be posted on the Website for review by interested parties, and will remain posted for a period of seventy-two (72) hours; excluding weekends, federal holidays, and FIU holidays.

Failure to file a notice of protest or the written petition in accordance with the Florida Board of Governors' Regulation 18.002, or Vendor's failure to post the Solicitation Protest Bond or other security as required in the Board of Governor's Regulations 18.002 and 18.003, shall constitute a waiver of the right to protest proceedings.

3.6 Commencement of Work

Vendor/Successful Vendor will not provide any commodities or services or take any action, even if such is as a result of any discussions with any FIU employee, prior to the Contract being signed by both parties. If Vendor/Successful Vendor provides services or commodities or takes any action prior to the Contract being signed by both parties, the Vendor/Successful Vendor does so at Vendor/Successful Vendor's sole risk and expense.

3.7 Alternate Brands or Equivalent Products

Any manufacturer's names, trade names, brand names, information and/or catalog numbers listed in the competitive solicitation are for information and not intended to limit competition. The Vendor may offer any brand for which Vendor is an authorized representative, where such brand meets or exceeds the specifications for any item. Likewise, customary measurements appearing in the competitive solicitation are not intended to preclude solicitation responses for commodities with equivalent metric measurements. All items provided by Vendor will be new items.

If Vendor's solicitation response is based on an alternate brand or equivalent product, Vendor must indicate the manufacturer's name and product number on the Vendor's solicitation response for such alternate brand or equivalent product. Vendor shall submit cuts sketches and descriptive literature, and/or complete specifications of the alternate brand or equivalent product with the solicitation response. Vendor may not reference information or literature submitted with a previous solicitation response. The Vendor shall also explain in detail the reasons why the proposed equivalent will meet the specifications and why it should not be considered an exception thereto. The University reserves the right to approve or reject an item as an approved alternate brand or equivalent product.

If Vendor's solicitation response lacks any written indication of intent to propose an alternate brand or equivalent product, Vendor's solicitation response will be received and considered by FIU to be for items that are in absolute compliance (including as to brand and measurement) with the specifications as written in the competitive solicitation.

4.0 SPECIFIC TERMS

4.1 Retention Guarantee

In the event FIU terminates an employee recommended by Successful Vendor for just cause or if the employee leaves of their own accord within the first (eighteen) months after hire date, Contractor agrees to find a suitable replacement for that employee without charge, except for expenses allowed by this agreement.

4.2 Non-Solicitation Clause

The Successful Vendor will not recruit selected candidate for other positions so long as the selected person remains in the position for which he/she was originally recruited, unless the University provides written prior approval to do so or the University terminates the candidate. FIU further recognizes that other search committees are not precluded from recruiting the placement and the placement is not precluded from applying from other positions. Those actions are out of the Successful Vendor's control and would not be in violation of this agreement.

4.3 Non-Compete

Successful Vendor shall not undertake a executive-level search with another major public research university or land grant institution for a period of three (3) months after signing an addendum to begin a search for similar executive-level position at FIU.

4.4 Affirmative Action and the Recruitment Process

Successful Vendor shall make a good faith effort to recruit qualified females, minorities, protected veterans, and individuals with disabilities. Contractor shall:

- (1) Provide a written statement regarding their procedures for collecting EEO data from applicants, and
- (2) Collect applicant and selection data that includes:
 - 1) A unique identifier for each applicant (Full name and Applicant ID #)
 - 2) EEO data for each applicant to include:
 - Ethnicity/race
 - Sex
 - Protected veteran status
 - Disability status (Office of Management and Budget Form CC-305 is required)
 - 3) The reason the applicant was removed from consideration (Examples: lack of knowledge, lack of experience; candidate withdrew, etc.)

Contractor shall submit the aforementioned data to the Division of Human Resources upon successful completion of the selection search.

4.5 OFCCP Compliance

Successful Vendor shall conduct Employment Searches in Compliance with the Office of Federal Contract Compliance Regulations. The Selected Firms agree to conduct all employment searches pursuant to this ITN in accordance with the Office of Federal Contract Compliance regulations. For each position for which an employment search is conducted, the Selected Firms will compile applicant demographic and disposition information ("information") for each applicant who meets

the Office of Federal Contract Compliance Definition of an Internet Applicant and will maintain this information in a Microsoft Excel file (“record”). The record will include, at a minimum, Applicant Number or Name, Gender, Race and Ethnic Identification (Based on EEO reporting category definitions), Applicant Status, and Working Title of the position for each applicant. Applicants must be requested to self-identify their gender and race and ethnic identification. Pursuant to the OFCCP regulations, any applicant presented to FIU by the Selected Firm must become a FIU applicant.

4.6 Records

The Selected Firms further agrees to provide the University with an electronic copy of the record for each employment search within ten business days of the termination of the employment search. The Selected Firms will maintain all records for any employment search resulting in a hire for a period of five years.

5.0 GENERAL TERMS

5.1 Insurance

The Successful Vendor shall provide and keep in full force and effect during the term of Contract, at the Successful Vendor’s own cost and expense, the following insurance policies for the joint benefit of the Successful Vendor and FIU, with an insurer reasonably acceptable to FIU:

Professional Liability/Errors & Omissions	\$ 2,000,000 (minimum)
Workers’ Compensation	Statutory Limits

In order for Successful Vendor to show that it can satisfy this requirement, the Successful Vendor must include in its solicitation response one of the following:

- a. A letter from Successful Vendor’s insurer stating that the Successful Vendor meets the currently specified insurance requirements, or**
- b. A commitment letter from an insurer that if awarded a contract, Successful Vendor will have access to such coverage, or**
- c. A Certificate of Insurance from Successful Vendor’s insurer stating that the Successful Vendor meets the currently specified insurance requirements.**

The Successful Vendor shall deliver to: FIU Purchasing Services Department, Campus Support Complex, CSC 411, 11200 S.W. 8th Street, Miami, Florida 33199, true and correct copies of certificates of such insurance within ten (10) business days of notice of formal award.

The Successful Vendor's policy shall be primary and any insurance carried by FIU shall be noncontributing with respect thereto.

The policies shall carry an endorsement to provide thirty (30) days prior written notice to FIU in the event of cancellation or reduction in coverage or amount. In the event the Successful Vendor's insurance carrier refuses to provide an endorsement to provide thirty (30) days prior written notice to FIU, then the Successful Vendor will be required to provide thirty (30) days prior written notice to FIU in the event of cancellation or reduction in the coverage or amount and secure any new insurance as required to comply with this Contract to ensure continuous coverage. If the Successful Vendor fails to secure and maintain insurance policies complying with the provisions of this Contract, FIU may terminate the Contract. Successful Vendor shall do nothing that will adversely affect FIU, in any way, including increasing risks, insurance premiums or liability

If the professional liability coverage is provided on a claims-made basis, then such insurance shall continue for three (3) years following the completion of the performance or the attempted performance of the provisions of this agreement. The insurance shall have a retroactive date of placement prior to or coinciding with the effective date of this agreement. If the coverage is canceled or non-renewed and not replaced with another claims-made policy form with a retroactive date prior to the effective date or coinciding with the effective date of this agreement the vendor must purchase Extended Reporting ("Tail") coverage for a minimum of three (3) years following the completion of the performance or the attempted performance of the provisions of this agreement.

In addition to the insurance required to be obtained and maintained by the Successful Vendor, if the Successful Vendor assigns any portion of the duties under the Contract in accordance with the terms thereof, each subcontractor or assignee is required to purchase and maintain insurance coverage that adequately covers each subcontractor's or assignee's exposure based on the type of services they are providing in connection with this Contract.

FIU reserves the right to cancel any award made or cancel the Contract if Successful Vendor fails to supply and/or maintain the required coverage.

Should Vendor take exception to the stated insurance requirements in its solicitation response, such will be grounds for disqualifying Vendor's solicitation response.

Successful Vendor's procuring of the required insurance shall not relieve the Vendor of any obligation or liability assumed under the Contract, including specifically the indemnity obligations. The Successful Vendor may carry, at his own expense, such additional insurance, as Vendor deems necessary. The Successful Vendor shall assist and cooperate in every manner possible in connection with the adjustment of all claims arising out of Vendor's operations within the scope provided for under the Contract, and shall cooperate in all litigated claims and demands, arising from said operations, which its insurance carrier or carriers are requested to respond.

5.2 Workers' Compensation

The Successful Vendor shall have and maintain during the life of the Contract, Workers' Compensation Insurance for all of its employees connected with the work related to the

competitive solicitation. In the event any work related to the competitive solicitation is sublet or subcontracted, the Vendor shall require the subcontractor similarly to provide Workers' Compensation Insurance for all of the latter's employees unless such employees are covered by the protection afforded by the Vendor. Such insurance shall comply fully with the Florida Workers' Compensation law. In case any class of employees engaged in hazardous work under the Contract at the site of the project is not protected under Workers' Compensation, the Vendor shall provide, and cause each subcontractor to provide, adequate insurance for the protection of such employees.

5.3 Software Warranty and Back up

If Successful Vendor is providing software to FIU, Vendor warrants that: (1) the media on which the product software is distributed is free from defects in materials and workmanship, and (2) the product performs the functions described in the documentation for the product. In addition, FIU may create and retain a copy of the software and related documentation for back up and disaster recovery purposes and for archival purposes. This provision shall survive termination or expiration of the Contract.

5.4 Services and Warranty

If Vendor will be providing services and warranties on the commodities and services that will be in addition to the services and warranties that are required in this competitive solicitation, then Vendor shall define and describe in its solicitation response such additional services and warranties, including replacement of items, that Vendor will provide.

The Successful Vendor will supply FIU with a complete and accurate W-9 and Vendor Application, available on the Website; if Vendor fails to supply the University with a complete and accurate W-9 and Vendor Application, the invoice will be deemed insufficient for payment until such information has been provided.

5.5 Safety

FIU seeks to furnish its students and employees with a place of work and study that is free from recognized hazards that are causing or are likely to cause death or serious physical harm, and one that complies with occupational health and safety standards promulgated under Occupational Safety and Health Act of 1970 (OSH ACT). Therefore, the Successful Vendor is required to comply with the occupational safety and health standards and all rules, regulations, and orders issued pursuant to the OSH ACT while on the University's premises.

5.6 Compliance With Laws and Regulations

The Successful Vendor shall comply and use its best efforts to assure that its employees, agents and subcontractors comply with all applicable federal and state laws and FIU's regulations policies, and procedures while performing the Contract and/or while on the University's premises. FIU's regulations, policies and procedures, as it may be updated, is available at: <http://policies.fiu.edu/>.

We are proud to be a Tobacco and Smoke Free Campus which means that smoking and/or the use of any tobacco product is not permitted in any area of the university campus including buildings, green spaces, vehicles, and parking areas. Visit <http://tobacco-free.fiu.edu> for more information.

5.7 Public Records Laws; Trade Secrets Certification.

As a public body corporate of the State of the Florida, FIU is subject to Chapter 119 of Florida Statutes, commonly known as the Florida Public Records Law. This competitive solicitation is a public record. Any documents Vendors submit to FIU in response to this competitive solicitation shall also become a public record, which will similarly be subject to the Florida Public Records Law. As required by law, FIU will respond to public records requests without providing Vendors whose documents have been requested any notice.

Should Vendors seek to assert trade secret protection for any document the Vendor submits in response to this competitive solicitation under Florida Statutes Section 688.002(4), Section 812.081(1)(c), Section 815.04(3), and/or Section 815.045, for each document that trade secret protection is claimed, Vendor must comply with the both of the following:

1. Segregate and separately label the document(s) claimed as trade secrets: documents produced electronically should be produced on separate CD or electronic media clearly-labeled "Trade Secret" on the physical media as well in the title of the electronic folder or file; documents produced in hard copy should be separated and each clearly labeled "Trade Secret." *Inserting the words "Confidential" and/or "Proprietary" to the front of or the footer of a document does not automatically entitle the document to be a trade secret under Florida law and thus is insufficient to comply with this requirement; and*
2. Provide a sworn affidavit (form is Appendix IV) signed by a high level officer of the Vendor to **FIU's Purchasing Services Department**, certifying the following for **each** separate claimed trade secret document:
 - a. Identify with specificity the document(s) for which trade secrets protection is claimed;
 - b. Provide a description of the document sufficient to determine the application of the trade secret exemption; and
 - c. Explain in detail the specific element(s) or provision(s) of Florida Statutes Section 688.002(4) or Section 812.081(c) that render the document at issue a trade secret exempted from public records under applicable Florida law.

A Vendor's failure to fully comply with the above and/or submit a sworn affidavit with its Solicitation Response is an affirmation acknowledgement by such Vendor that none of its documents are trade secrets.

If a Vendor properly complies and submits a sworn affidavit with its Solicitation Response and FIU later receives a public records request for a document or information that is marked and certified with an affidavit to be a trade secret, we will provide the requestor a copy of the Vendor's sworn affidavit. Any challenge to the affidavit and the application of the trade secret exemption shall be rebutted, if at all, only by the

Vendor; FIU's only obligation will be to provide Vendor notice that such a challenge has been received. The notice shall serve as formal notice to the Vendor that such Vendor has thirty (30) calendar days following receipt of such notice from FIU to file an action with a court of competent jurisdiction seeking an order barring public disclosure of the document(s). If Vendor files an action within thirty (30) calendar days after receipt of notice of a challenge to its trade secret certification, FIU will not release the documents at issue pending the outcome of the legal action. The failure to file an action within thirty (30) calendar days constitutes a waiver of any claim of confidentiality, and the FIU will release the document as requested.

5.8 Parking

The Successful Vendor shall ensure that all of the Vendor's and Vendor's employees', agents' and subcontractors' vehicles parked on the University premises have proper parking permits. All vehicles must be registered with, and have parking permits purchased from FIU's Parking Services Department properly displayed. Vendor and Vendor's employees, agents and subcontractors shall observe all parking regulations. The failure to purchase parking permits, properly display them, and otherwise comply with all FIU's parking regulations could result in the ticketing and/or the towing of Vendor's or Vendor's employees', agents', and subcontractors' vehicles. For additional parking information, contact FIU's Department of Parking and Transportation at (305) 348-3615.

5.9 Public Entity Crimes

In accordance with Florida Statutes §287.133(2)(a), a vendor who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal; may not perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, including FIU; and may not transact business with FIU in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date being placed on the convicted vendor list. By submitting a solicitation response, Vendor is certifying that Vendor is not on the convicted vendor list maintained by the Florida Department of Management Services, and Vendor is also certifying that any subcontractor listed in Vendor's solicitation response is not on the convicted vendor list.

5.10 Waiver of Rights and Breaches

No right conferred on FIU by this competitive solicitation or resulting Contract, if any, shall be deemed waived and no breach of any such Contract excused, unless such waiver of right or excuse of breach is in writing and signed by FIU. FIU's waiver of a right or breach shall not constitute a waiver or excuse of any other right or breach.

5.11 Conflict of Interest

The award of this competitive solicitation is subject to the provisions of Florida Statutes Chapter 112. Vendor must disclose in its solicitation response the name of any officer, director, or agent of the Vendor who is also an employee of FIU, or of the State of Florida or of any of its agencies.

Further, Vendor must disclose in its solicitation response the name of any FIU or State employee who owns, directly or indirectly, an interest of five (5%) or more of the Vendor's company or any of its affiliates or branches.

In addition, in accordance with Section 112.3185, Florida Statutes, by submitting a solicitation response, the Vendor certifies that, to the best of its knowledge and belief, no individual employed by the Vendor or subcontracted by the Vendor has an immediate relationship to any FIU employee who was or is directly or indirectly involved in any way in the drafting, evaluating, or awarding of this competitive solicitation.

Failure to disclose the required information or violation of Section 112.3185, Florida Statutes, shall be grounds for rejection of Vendor's solicitation response, cancellation of an intent to award, and/or cancellation of any Contract with the Vendor.

5.12 Covenant Against Commissions, or Brokerage and Contingent Fees

By submitting a solicitation response, the Vendor warrants that Vendor has not employed or retained any person or entity, other than a bona fide employee working solely for the Vendor, to solicit or secure any award or Contract resulting from this competitive solicitation or to solicit or secure any other advantage related to this competitive solicitation. By signing a Contract with FIU, Successful Vendor warrants that the Successful Vendor has not paid or agreed to pay any person, company, corporation, individual, or firm, other than a bona fide employee working solely for the Successful Vendor, any fee, commission, percentage, gift, or other consideration contingent upon or resulting from the award or making of the Contract. In the event Successful Vendor's breach or violation of this warranty, FIU has the right to annul any Contract with such Successful Vendor resulting from this competitive solicitation, without liability, and to deduct from any amounts otherwise payable to Vendor under such Contract the full amount of such fee, commission, percentage, gift, or other consideration, and to pursue any other remedy available to FIU under such Contract, at law or in equity.

5.13 Use of Contract by Other Governmental Agencies

At the option of the Vendor, the use of any contract resulting from this competitive solicitation may be extended to other governmental entities, including the State of Florida, its agencies, political subdivisions, counties, and cities, and any university in the State University System. Each such entity using such contract shall do so independently of FIU and shall be solely responsible for its own purchases.

5.14 Disposition of Solicitation Responses

All solicitation responses become the property of FIU, and FIU shall have the right to use all ideas, and/or adaptations of those ideas, contained in any solicitation response received in response to this competitive solicitation. Any parts of the solicitation response, and any other material(s) submitted to FIU with the solicitation response will become a public document pursuant to Section 119.07, F.S. This includes material that the responding proposer might consider to be confidential or a trade secret. FIU's selection or rejection of a solicitation response will not affect this exemption.

5.15 Licensing Requirements

To the extent applicable, Vendor shall have all appropriate licenses to conduct business in the State of Florida and Miami-Dade County at or prior to award of a contract resulting from this competitive solicitation; Vendor must provide proof of such to FIU as a condition of award of a contract.

5.16 Subcontractors

If Vendor contemplates the use of subcontractors, as a further condition of award of a contract, the Vendor must certify in writing that all of its subcontractors are appropriately licensed and are registered with the State of Florida in accordance with Florida Statutes Chapters 607 or 620, and such statement will include any subcontractors' corporate charter numbers. For additional information on registering, Vendors should contact the Florida Secretary of State's Office.

The Successful Vendor is fully responsible for all work performed under the Contract resulting from this competitive solicitation. The Successful Vendor may, with the prior written consent of FIU, enter into written subcontract(s) for performance of certain of its functions under such Contract. The subcontractors and the amount of the subcontracts shall be identified in the Vendor's solicitation response. Vendor's subcontracts shall not be implemented or effective until and unless approved in writing by FIU. No subcontract which the Vendor enters into related to the Contract shall in any way relieve the Vendor of any responsibility for performance of its duties under the Contract. Vendor will fully notify any subcontractors of Vendor's responsibilities pursuant to the FIU Contract in Vendor's subcontract(s) with a subcontractor(s) for work related to this competitive solicitation. Vendor is solely responsible for all payments to its subcontractors.

5.17 Small Business Minority Enterprise (SMBE) Reporting

It is the FIU's policy (consistent with state and federal law), to optimize opportunities for business contracting with small, minority and disadvantaged business enterprises in the areas of commodities, construction, contractual services, and architectural and engineering services.

Vendors are likewise encouraged to use the small, minority and disadvantaged business enterprises and to have a business diversity program in place. The Successful Vendor shall report all minority subcontractors, identifying the Name, Address, Type of Certification and Dollar Amount to FIU with each invoice submitted for payment.

For more information on becoming a State of Florida Certified Minority Business (CMBE), to request certification or to locate CMBEs, please contact the Office of Supplier Diversity, Department of Management Services at (850) 487-0915.

5.18 Equal Opportunity Statement

FIU believes in equal opportunity practices which conform to both the spirit and the letter of all laws against discrimination, and FIU is committed to non-discrimination based on race, color, religion, sex, national origin, Veteran status, marital status, age or disability. The Successful Vendor will not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, Veteran status, marital status, age or disability. Successful

The Successful Vendor will comply with the provisions of Executive Order 11246, September 24, 1965, as amended by Executive Order 11375, and the rules, regulations and relevant orders of the Secretary of Labor that are applicable to each order placed against the Contract regardless of value.

The Successful Vendor will comply with the Americans with Disabilities Act (ADA) of 1990, as revised.

If the Vendor anticipates receiving \$10,000 in orders during the first 12 months of the Contract, Vendor's authorized representative must complete, sign and date a Certificate of Non-Segregated Facilities form and include the form in its solicitation response. The certificate is attached as **APPENDIX II**.

If the Successful Vendor anticipates receiving \$50,000 in orders during the first 12 months of the Contract, and employs more than 50 people, the Successful Vendor will complete and file prior to March 1 of each year a standard form 100 (EEO-1), and will maintain a written program for affirmative action compliance that is available for review upon FIU's request.

5.19 Vendor's Employment of Unauthorized Aliens

Employment of unauthorized aliens is considered a violation of Section 274A(e) of the Immigration and Nationality Act. If the Successful Vendor knowingly employs unauthorized aliens, such violation shall be cause for FIU's unilateral cancellation of the Contract.

APPENDIX I

CONDITIONS AND REQUIREMENTS

SUPPLEMENTAL SOLICITATION RESPONSE SHEET

Those items in the following Sections of this competitive solicitation and the Sections of the Appendix III (Sample Contract) must each be initialed under either YES to indicate that the Vendor understands and agrees to the entire Section or NO to indicate that the Vendor does not agree to the entire Section. Failure to complete and return this document with your solicitation response could result in rejection of your solicitation response. Vendors shall not check items as YES (understood and agreed to) for purposes of submitting a solicitation response with the hopes of later negotiating a change of those conditions and requirements. If a Vendor does not understand or agree with any of the conditions or requirements, the Vendor should check NO by the specific provision the Vendor is not in agreement with and provide proposed alternative language or an explanation as to why Vendor is not in agreement with the given provision. Vendor's failure to accept said conditions and requirements is grounds for FIU's rejection of Vendor's solicitation response.

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>VENDOR INITIAL</u>
1.0	_____	_____	_____
1.1	_____	_____	_____
1.2	_____	_____	_____
1.3	_____	_____	_____
1.4	_____	_____	_____
1.5	_____	_____	_____
1.6	_____	_____	_____
1.7	_____	_____	_____
2.0	_____	_____	_____
2.1	_____	_____	_____
2.2	_____	_____	_____
2.3	_____	_____	_____
2.4	_____	_____	_____
2.5	_____	_____	_____

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>VENDOR INITIAL</u>
2.6	_____	_____	_____
2.7	_____	_____	_____
2.8	_____	_____	_____
2.9	_____	_____	_____
2.10	_____	_____	_____
2.11	_____	_____	_____
2.12	_____	_____	_____
2.13	_____	_____	_____
2.14	_____	_____	_____
2.15	_____	_____	_____
3.0	_____	_____	_____
3.1	_____	_____	_____
3.2	_____	_____	_____
3.3	_____	_____	_____
3.4	_____	_____	_____
3.5	_____	_____	_____
3.6	_____	_____	_____
3.7	_____	_____	_____
4.0	_____	_____	_____
4.1	_____	_____	_____
4.2	_____	_____	_____
4.3	_____	_____	_____
4.4	_____	_____	_____
4.5	_____	_____	_____

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>VENDOR INITIAL</u>
5.0	_____	_____	_____
5.1	_____	_____	_____
5.2	_____	_____	_____
5.3	_____	_____	_____
5.4	_____	_____	_____
5.5	_____	_____	_____
5.6	_____	_____	_____
5.7	_____	_____	_____
5.8	_____	_____	_____
5.9	_____	_____	_____
5.10	_____	_____	_____
5.11	_____	_____	_____
5.12	_____	_____	_____
5.13	_____	_____	_____
5.14	_____	_____	_____
5.15	_____	_____	_____
5.16	_____	_____	_____
5.17	_____	_____	_____
5.18	_____	_____	_____
5.19	_____	_____	_____

(ENUMERATE T'S AND C'S FROM APPENDIX III- Sample Contract)

1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____

<u>SECTION</u>	<u>YES</u>	<u>NO</u>	<u>VENDOR INITIAL</u>
4.	_____	_____	_____
5.	_____	_____	_____
6.	_____	_____	_____
7.	_____	_____	_____
8.	_____	_____	_____
9.	_____	_____	_____
10.	_____	_____	_____
11.	_____	_____	_____
12.	_____	_____	_____
13.	_____	_____	_____
14.	_____	_____	_____
15.	_____	_____	_____
16.	_____	_____	_____
17.	_____	_____	_____
18.	_____	_____	_____
19.	_____	_____	_____
20.	_____	_____	_____

VENDOR COMPANY NAME _____

AUTHORIZED SIGNATURE _____

TITLE _____

DATE _____

APPENDIX II

CERTIFICATE OF NON-SEGREGATED FACILITIES

We, _____
certify to the Florida International University that we do not and will not maintain or provide for our employees any segregated facilities at any of our establishments, and that we do not and will not permit our employees to perform their services, under our control, where segregated facilities are maintained. We understand and agree that a breach of this certification is a violation of the Equal Opportunity clause required by Executive order 11246 of 24 September 1965.

As used in this certification, the term "segregated facilities" means any waiting rooms, work areas, rest rooms and wash room, restaurants and other eating areas, time clocks, locker rooms and other storage or dressing areas, parking lots, drinking fountains, recreation or entertainment areas, transportation and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, creed, color or national origin, because of habit, local custom or otherwise.

We, further, agree that (except where we have obtained identical certifications from proposed subcontractors for specific time periods) we will obtain identical certifications from proposed subcontractors prior to the award of subcontracts exceeding \$10,000 which are not exempt from the provisions of the Equal Opportunity Clause; that we will retain such certification in our files; and that we will forward the following notice to such proposed subcontractors (except where the proposed subcontractors have submitted certifications for specific time periods):

NOTE TO PROSPECTIVE SUBCONTRACTORS OR REQUIREMENTS FOR CERTIFICATIONS OF NON-SEGREGATED FACILITIES. A Certificate of Non-segregated Facilities, as required by the 9 May 1967 order on Elimination of Segregated Facilities, by the Secretary of Labor (32 Fed. Reg. 7439, 19 May 1967), must be submitted prior to the award of a sub-contract exceeding \$10,000 which is not exempt from the provisions of the Equal Opportunity clause. The certification may be submitted either for each sub-contract or for all subcontracts during a period (i.e. quarterly, semiannually, or annually).

NOTE: Whoever knowingly and willfully makes any false, fictitious or fraudulent representation may be liable to criminal prosecution under 18 U.S.C. 1001.

APPENDIX II

CERTIFICATE OF NON-SEGREGATED FACILITIES

SUBPART - VENDOR'S AGREEMENTS

During the performance of this Contract, the Vendor agrees as follows:

- (1) The Vendor will not discriminate against any employee or applicant for employment because of face, color, religion, sex, or national origin. The Vendor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Vendor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
- (2) The Vendor will, in all solicitations or advertisements for employees placed by or on behalf of the Vendor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.
- (3) The Vendor will send to each labor union or representative of workers with which the Vendor has a collective bargaining agreement or other Contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or worker's representative of the Vendor's commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of notice in conspicuous places available to employees and applicants for employment.
- (4) The Vendor will comply with all provisions of Executive Order No. 11246 of September 24, 1965 and of the rules, regulations, and relevant orders of the Secretary of Labor.
- (5) The Vendor will furnish all information and reports required by Executive order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.
- (6) In the event of the Vendor's noncompliance with the nondiscrimination clauses of this Contract or with any of such rules, regulations, or orders, this Contract may be canceled, terminated, or suspended in whole or in part and the Vendor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoiced as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

- (7) The Vendor will include the provision of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subVendor or Vendor. The Vendor will take such action with respect to any subcontract or purchase orders the contracting agency may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event the Vendor becomes involved in, or is threatened with, litigation with a subVendor or Vendor as a result of such direction by the contracting agency, the Vendor may request the United States to enter into such litigation to protect the interest of the United States.

SEC. 402 Affirmative Action for Disabled Veterans and Veterans of the Vietnam Era:

- (1) The Vendor agrees to comply with the affirmative action clause and regulation published by the US Department of Labor implementing Section 402 of the Vietnam Era Veteran's Readjustment Assistance Act of 1974, as amended, and Executive Order 11701, which are incorporated in this certificate by reference.

VENDOR COMPANY NAME _____

AUTHORIZED SIGNATURE _____

TITLE _____

DATE _____

APPENDIX III

SAMPLE CONTRACT

THIS CONTRACT (the "Contract") is made and entered into on _____ (the "Effective Date"), by and between **The Florida International University Board of Trustees ("FIU")** and _____, a (state of incorporation and type of entity), whose address is _____, _____, _____, _____, who is authorized to do business in the State of Florida (the "Contractor").

RECITALS

WHEREAS, FIU requested solicitation responses for Competitive Solicitation ITN No. _____ ("ITN # _____") to provide the following goods and/or services: _____ (the "Services");

WHEREAS, the Contractor submitted a solicitation response for ITN # _____ to perform the Services ("Contractor's Solicitation Response"), which was accepted by FIU.

NOW, THEREFORE, in consideration of the mutual promises and agreements made herein and intending to be legally bound hereby, the parties hereto agree as follows:

1. **Term.** This Contract commences on the Effective Date and will continue for an initial term of _____ (__) year (the "Initial Term") and may be renewed in writing by the parties for _____ (__) additional _____ (__) year term(s) (each one year term referred to as the "Renewal Term").

2. **Contract.** The Contractor will provide to FIU the Services pursuant to the terms and conditions described in the following: the Competitive Solicitation for ITN # _____ (including Addendum 1), attached hereto as Exhibit I and incorporated herein by reference; the Contractor's Solicitation Response, attached hereto as Exhibit II and incorporated herein by reference; and the Contractor's Best and Final Offer, attached hereto as Exhibit III and incorporated herein by reference. In the event of conflict between or among terms and conditions contained in the foregoing documents with regards to the Services, such documents shall govern in the following order of precedence: first, this Contract; second, Exhibit I (the Competitive Solicitation for ITN # _____, including Addendum 1); third, Exhibit III (the Contractor's Best and Final Offer); and fourth, Exhibit II (the Contractor's Solicitation Response).

3. **Payment.** The Contractor shall provide the Services to FIU pursuant to the pricing set forth in Exhibit III, Tab _____ (page _____). The Contractor shall submit invoices for fees or other compensation for services or expenses in detail sufficient for a proper pre-audit and post-audit. FIU will make payment in accordance with FIU Regulation FIU-2202, which states the Contractor's rights as a vendor and FIU's responsibilities concerning interest penalties and time limits for payment of invoices. Upon receipt, FIU has five (5) business days to inspect and approve the goods or services. If a payment is not issued within **forty (40) days of receipt** of a proper invoice and receipt and inspection and approval of the goods and services, FIU will pay to the

Contractor, in addition to the amount of the invoice, an interest penalty at the rate established pursuant to Florida Statutes §55.03(1), provided the interest penalty is in excess of one dollar (\$1.00). A Vendor Ombudsman has been established within the Office of Business and Finance. The duties of this individual include acting as an advocate for vendors who may be experiencing problems in obtaining timely payment from FIU. The Vendor Ombudsman may be contacted at (305) 348-2101.

The Contractor shall cooperate with FIU and provide specific records and/or access to all of the Contractor's records related to the Contract for purposes of conducting an audit or investigation. FIU will provide Contractor with reasonable notice of the need for such records or access.

4. **Assignment/Modification of Contract.** This Contract may not be assigned or modified by either party except as agreed to in writing and signed by both parties. The Contract shall be binding upon the parties' successors and assigns.

5. **Sovereign Immunity.** Nothing in this Contract shall be construed as an indemnification of the Contractor by FIU or as a waiver of sovereign immunity beyond that provided in Florida Statutes §768.28.

6. **Governing Law; Venue.** This Contract is governed by the laws of the State of Florida and exclusive venue of any actions arising out of this Contract shall be in the courts in Miami-Dade County, Florida.

7. **Relationship of the Parties.** The Contractor is an independent contractor, and neither the Contractor nor the Contractor's employees, agents, or other representatives shall be considered FIU's employees or agents. The Contractor shall not use FIU's name, trademarks, logos, or marks without FIU's prior written approval. The Contractor represents and warrants that it is not on the Convicted Vendor List (see Fla. Stat. § 287.133(2)(a)). Each party hereby assumes any and all risk of personal injury and property damage attributable to the willful or negligent acts or omissions of that party and the officers, employees, and agents thereof. The Contractor also assumes such risk with respect to the willful or negligent acts or omissions of the Contractor's subcontractors or persons otherwise acting or engaged to act at the instance of the Contractor in furtherance of the Contractor fulfilling the Contractor's obligations under the Contract.

8. **Compliance with Public Records Law.** FIU is subject to applicable public records laws as provided by provisions of Florida Statutes Chapter 119, and FIU will respond to such public records request without any duty to give the Contractor prior notice. FIU may unilaterally cancel this Contract for Contractor's refusal to allow public access to all public records that were made or received in conjunction with this Contract. This provision shall survive termination or expiration of the Contract.

9. **Annual Appropriations.** FIU's performance and obligation to pay under the Contract is subject to and contingent upon the availability of funds appropriated by the Florida Legislature or otherwise lawfully expendable for the purposes of such Contract for the current and

future periods. FIU will give notice to the Contractor of the non-availability of funds when FIU has knowledge thereof. Upon receipt of such notice by Contractor, Contractor is entitled to payment only for those services performed and accepted by FIU prior to the date such notice is received.

10. **Taxes.** FIU is a tax immune sovereign and exempt from the payment of sales, use or excise taxes. The Contractor shall pay all personal property taxes on leased equipment and all taxes based upon net income.

11. **Travel Expenses.** Contractor shall not charge FIU for any travel expenses, meals, and lodging unless otherwise provided in this Contract and FIU's prior written approval of the expenses has been obtained. Under such circumstances, Contractor is authorized to incur the agreed to travel expenses which will be payable by FIU, but only to the extent permitted in Florida Statutes § 112.061 and the FIU Policy 1110.060 Travel: University Travel Expense Policy, which is available at http://policies.fiu.edu/record_profile.php?id=548&s=travel. Contractor is responsible for any expenses in excess of these prescribed amounts.

12. **Force Majeure.** No default, delay or failure to perform on the part of the either party shall be considered a default, delay or failure to perform otherwise chargeable, hereunder, if such default, delay or failure to perform is due to causes beyond either party's reasonable control including, but not limited to, strikes, lockouts or inactions of governmental authorities; epidemics; acts of terrorism; war; embargoes; fire; earthquakes; hurricanes; acts of God; or default of common carrier. In the event of such default, delay or failure to perform, any date or times by which either party is otherwise scheduled to perform shall be extended automatically for a period of time equal in duration to the time lost by reason of the excused default, delay or failure to perform.

13. **Indemnification.** The Contractor is responsible for its performance under the Contract. The Contractor will indemnify and hold harmless, assume liability for and defend, the State of Florida, the Florida Board of Governors, FIU and their officers, employees, and agents, from and against any and all actions, claims, liabilities, assertions of liability, losses, costs and expenses, which may arise in any manner or are alleged to have arisen, from the acts, omissions or wrongful conduct of Contractor or Contractor's officers, employees, agents, guests, patrons, licenses, invitees or subcontractors in connection with or related to their operations, activities, and/or occupancy or use of the FIU premises in performance of the Contract. This provision shall survive termination or expiration of the Contract.

14. **Trademark or Copyright Infringement.** Contractor will, at its expense, defend any suit brought against FIU and will indemnify FIU against an award of damages and costs made against FIU by settlement or final judgment of a court that is based on a claim that the use of the Contractor's product infringes a trademark or copyright of a third party; provided that FIU notifies Contractor in writing of the suit or any claim of infringement within thirty (30) days after receiving notice thereof, and further provided that Contractor is permitted to control the defense in any litigation or settlement of the suit. FIU will provide reasonable cooperation in the defense of the suit at Contractor's expense. Such defense and indemnity shall survive termination or expiration of the Contract.

15. **Confidentiality of Information.** The Contractor acknowledges and agrees that (a) all documents, studies, materials and information furnished to the Contractor by FIU or FIU's affiliates in connection with this Contract and (b) all reports, studies, plans, deliverables, strategies, materials and other documents and information developed or prepared for FIU in connection with this Contract or which reflect any of the documents, studies, materials or information furnished to the Contractor by FIU (the materials described in (a) and (b) are collectively referred to as the "Information") are and shall remain at all times confidential, proprietary, and the sole property of FIU. The Contractor agrees that it shall not use the Information and will not share the Information with its employees, except as necessary to the Contractor's performance under this Contract, and the Contractor shall at all times comply with all state and federal laws governing the use and/or safe-keeping of confidential and/or personally identifiable information. The Contractor shall not disclose Information to third parties unless it obtains FIU's written consent to such disclosure.

In the event the Contractor required by subpoena or other judicial or administrative process or by law to disclose such records, the Contractor shall (i) provide FIU with prompt notice thereof; (ii) consult with FIU on the advisability of taking steps to resist or narrow such disclosure; (iii) furnish only that portion of the information that is responsive to the request; (iv) comply with the requirements of all state and federal privacy laws applicable to the Information, which may include but is not be limited, to Florida Public Records laws, FERPA, the Gramm-Leach Bliley Act, the Federal Trade Commission's Red Flags Rule (which implements Section 114 of the Fair and Accurate Credit Transactions Act of 2003); and (v) reasonably cooperate with FIU in any attempt that FIU may make to obtain an order or other reliable assurance that confidential treatment will be accorded the records. Upon termination of this Contract or upon request by FIU, the Contractor shall promptly return the Information to FIU. Notwithstanding the foregoing, if FIU will share or provide access to protected health information or "PHI" to FIU for the Contractor to perform this Contract, FIU and the Contractor will enter into a separate business associate agreement which will govern the confidentiality and non-use obligations of the Contract regarding the PHI (in lieu of this provision). This provision shall survive the termination or expiration of this Contract.

16. **Lobbying.** Contractor is prohibited from using funds provided under this Contract for the purpose of lobbying the Legislature or any official, officer, commission, board, authority, council, committee, or department of the executive branch or the judicial branch of state government.

17. **Termination for Cause.** Either party may terminate this Contract for cause by giving the other party thirty (30) calendar-days written notice setting forth with specificity the basis for the termination of the Contract for cause. For purposes of this Contract, "cause" shall mean the failure by either party to: (i) provide the goods or perform the services within the time specified in this Contract; or (ii) adhere to any terms of this Contract.

18. **Notice.** Any notices required under this Contract shall be sent via U.S. Mail, return receipt requested, to the parties at the following addresses:

Notices to Contractor:

Notices to FIU:

Purchasing Director
FIU- Purchasing Services Department
Campus Support Complex, CSC 411
11200 S.W. 8th Street
Miami, Florida 33199

With copy to:

Florida International University
Office of the General Counsel
Modesto A. Maidique Campus
11200 S.W. 8th Street, PC 511
Miami, Florida 33199

19. **Termination without Cause.** FIU may terminate this Agreement by giving Contractor at least ninety (90) days prior written notice of termination. FIU shall only be liable for payment of goods received and/or services rendered and accepted by FIU prior to the effective date of termination.

20. **No counterparts; facsimile signatures allowed.** This Contract may not be executed in counterparts. The Contract, along with any and all Exhibits, may be executed and delivered by facsimile signature by any of the parties to the other parties; to the extent permissible under Florida law, a facsimiles signature shall have the same legal force and effect as an original signature and the receiving party may rely on the receipt of such document so executed and delivered by facsimile signature as if the original had been received.

21. **Clarifications/negotiated points (if any) are:** None.

THE REMAINDER OF THIS PAGE IS INTENTIONALLY LEFT BLANK.

IN WITNESS WHEREOF, the parties have affixed their signatures, effective on the date first written above.

FOR THE CONTRACTOR:

BY:

NAME & TITLE:

DATE:

FOR FIU:

**THE FLORIDA INTERNATIONAL UNIVERSITY
BOARD OF TRUSTEES**

BY:

NAME & TITLE:

DATE:

APPROVED AS TO FORM AND LEGALITY

BY: _____

FIU Attorney

DATE:

APPENDIX IV**AFFIDAVIT OF TRADE SECRET CERTIFICATION**

STATE OF _____

COUNTY OF _____

I, the undersigned, being first duly sworn, do hereby state under oath and under penalty of perjury that the following facts are true:

1. I am over the age of eighteen and am a resident of the State of _____. I have personal knowledge of the facts herein, and, if called as a witness, could testify competently thereto.
2. I am the _____ (position) of _____ (name of corporate entity), a _____ (state) _____ (type of corporate entity), whose principal address is _____.
3. [I consider/My company considers] the information contained in the document(s) entitled _____ (provide description of the information) marked as Exhibit ____ (comprised of a total of ____ pages) a trade secret under applicable law for the following reasons: *(Explain in detail the specific element(s) or provision(s) of Florida Statutes that render the document(s) at issue a trade secret.*
4. [I have/My company has] taken measures to prevent the disclosure of the information contained in Exhibit _____ to anyone other than those who have been selected to have access for limited purposes, and [I intend/my company intends] to continue to take such measures.
5. [I consider/My company considers] the information contained in Exhibit ____ to have value and provides an advantage or an opportunity to obtain an advantage over those who do not know or use it.
6. All of information in Exhibit ____ contained is not, and has not been, reasonably obtainable without [my/our] consent by other persons by use of legitimate means.
7. All of information in Exhibit _____ is not publicly available elsewhere.
8. I am the person for Florida International University to contact in the event a challenge to any information contained in this Affidavit is received.

Executed on this _____ day of _____ in _____ County,
_____ (State).

Affiant- Full Name: _____

Address: _____

Telephone: _____

E-mail: _____

Affiant Signature: _____

STATE OF _____

COUNTY OF _____

Sworn to or affirmed and signed before me on _____ (date)
by

_____ (Affiant).

NOTARY PUBLIC

Personally Known

Produced identification (Type of ID)

SAMPLE ADDENDUM

THIS ADDENDUM to the Agreement (“Addendum”) is entered into as of the last date written below (the “Effective Date”) by and between **THE FLORIDA INTERNATIONAL UNIVERSITY BOARD OF TRUSTEES** (“**FIU**”), on behalf of *(the department)* _____, and _____ (*CONTRACTOR NAME*), a *(state & type of corporation)* _____, whose address is _____, and who is authorized to do business in the State of Florida (“Contractor”).

WHEREAS, FIU and Contractor entered into that certain Agreement dated _____ pursuant to ITN # _____ (collectively the “Agreement”), for Contractor to provide executive search firm services (the “Services”);

WHEREAS, pursuant to the terms of the Agreement, FIU has requested Contractor to provide the Services for the search for the Position defined below (this “Engagement”); and

WHEREAS, Contractor and FIU have agreed to the following specific terms for this Engagement;

NOW THEREFORE, for and in consideration of the covenants contained herein and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties agree as follows:

1. **Recitals/Ratification.** The above recitals are true and correct and incorporated herein. The Agreement remains in effect and unchanged, and the terms of this Addendum are in addition to the terms and conditions as set forth in the Agreement.
2. **Position.** This Engagement is for Contractor to provide the Services and search for the following position: _____ (the “Position”).
3. **Engagement Services.** The Services to be provided by Contractor for this Engagement shall include: meeting with FIU to gather information; collaborating with FIU to develop an overall search plan of action, timeline and recruitment materials; and designing an interview and selection process; assisting in creation or updates to the Position profiles; assisting in determining how to advertise the Position and assisting with placement of the advertisements; actively recruiting applicants, screening applicants; tracking and managing prospect and candidate information throughout the search process, comparing potential candidates; assisting FIU in conducting background checks and coordinating reference checks on selected candidates; providing technical, administrative, and logistical support for the search and interview process, site visits, final selection, contract negotiations, transition considerations, and follow-up; and collaborating with FIU throughout the search; and any other services as described in the Agreement.
4. **Engagement Term.** Commencement of the Contractor’s performance of this Engagement shall begin on the Effective Date hereof and shall end upon the Employment Date of the candidate selected for the Position. Contractor will deliver the Services related to this Engagement in accordance with the following schedule of delivery dates: _____.
5. **Consultant.** The Contractor’s consultant(s) assigned to this Engagement is/are: _____.

6. **Notices/Invoices.** In addition to the address provided in the Agreement, notices and invoices related to this Engagement will be sent to:

Florida International University
Department: _____
11200 SW 8th Street, _____
Miami, Florida 33199
Attention: _____

7. **Retainer Fee.** FIU will pay Contractor for this Engagement a “Retainer Fee” of: *(choose one)*
TBD
8. **Billing.** Contractor will bill FIU for the Retainer Fee in three (3) equal installments, to be invoiced as follows:
TBD
9. **Direct Expenses.** FIU will reimburse Contractor for direct expenses related to the search pursuant to the terms of the Agreement. Expenses will be billed as incurred on a **TBD** basis, upon the submission of a correct invoice and receipts to FIU.
10. **Indirect Expenses.** FIU will pay an amount equal to **TBD** of the Retainer Fee to cover indirect expenses for this Engagement and administrative assistance. Such Indirect Expenses will be billed in **TBD** installments, with such installments due from FIU at the end of the **TBD** month of this Engagement.
11. **Replacement Search.** In the event the search for the Position fails, or if the selected candidate is terminated for cause or leaves the Position in less than one (1) year from the Employment Date without good reason (as determined by FIU), Contractor shall conduct a replacement search for no additional fee, charging only for out-of-pocket expenses, This obligation shall survive termination of this Addendum and the Agreement.
12. **Capitalized Terms.** All capitalized terms used herein but not expressly defined herein shall have the meaning ascribed thereto in the Agreement.

CONTRACTOR SHALL NOT COMMENCE SERVICES UNTIL THIS ADDENDUM IS FULLY EXECUTED.

[SIGNATURES ON THE FOLLOWING PAGE]

APPENDIX V

IN WITNESS WHEREOF, the parties have affixed their signatures to this Addendum, effective as of the Effective Date.

FOR THE CONTRACTOR:

(CONTRACTOR'S NAME)

By: _____

Print Name: _____

Title: _____

Date: _____

FOR FIU:

**THE FLORIDA INTERNATIONAL UNIVERSITY
BOARD OF TRUSTEES**

By: _____

Name: _____

Title: _____

Date: _____

By: _____

Name: _____

Title: _____

Date: _____

APPROVED AS TO FORM AND LEGALITY:

By: _____

Print Name: _____

Title: FIU Attorney

Date: _____

SAMPLE



**FLORIDA
INTERNATIONAL
UNIVERSITY**

Purchasing Services
(305) 348-2161
FAX (305) 348-3600

December 9, 2015

**ITN56-001
Search Firms**

ADDENDUM #1

Re: Answers to Vendor Inquiries and revisions to Sections Section 1.4 Solicitation Response and Deliverables and Section 1.5 Evaluation Points.

VENDORS MUST ACKNOWLEDGE RECEIPT OF THIS ADDENDUM BY SIGNING BELOW AND SUBMITTING THIS EXECUTED DOCUMENT WITH YOUR RESPONSE. FAILURE TO EXECUTE AND RETURN THIS ADDENDUM FORM WILL DISQUALIFY YOUR FIRMS' RESPONSE.

This Addendum shall become part of your firms' competitive solicitation response and the subsequent contract documents if applicable. This addendum document must be attached to your Solicitation Response. Failure to execute this document and return of same with your firms' competitive solicitation response will be grounds for immediate disqualification.

Company Name _____

Address _____

Telephone/Fax/Email _____

Signature _____

Form#PS008; CD04/03/07

ITN56-001
Search Firms

ADDENDUM #1

Re: Answers to Vendor Inquiries and revisions to Sections Section 1.4 Solicitation Response and Deliverables and Section 1.5 Evaluation Points.

1. **QUESTION: Tab 4.h** – We’ve made in excess of 3,500 placements over the past four years. Are you seeking the details, behind every placement or a sample of placements?

ANSWER: FIU is seeking a sample of placements to include the most recent hires for categories the firm is responding to included but not limited to the categories listed in **Section 1.3 Scope of Work and Deliverables, Table 1.**

2. **QUESTION:** We are unable to provide the names of all of our clients due to various non-publicity and confidentiality agreements. Is the client’s industry an acceptable alternative?

ANSWER: FIU would like to see a sample of the salary comparisons during a given search.

3. **QUESTION: Tab 5.f** – We would like to confirm that this is a guideline for how to proceed during a given search and that you are not looking for salary comparisons for all positions amongst peer institutions in advance of proposal completion. If requested now, it would likely be stale by the time the individual search was being conducted.

ANSWER: We would like to see a sample of the salary comparisons during a given search.

4. **QUESTION:** Is this for direct hire positions only?

ANSWER: Yes. We are enlisting the expertise of potential vendors in identifying talent for direct hires.

5. **QUESTION:** What is driving the RFP?

ANSWER: Our existing contract for search firm services is expiring. Therefore, the decision has been made to go back out for a competitive solicitation.

6. **QUESTION:** Can you provide the “spend” specifically for the scope of this RFP?

ANSWER: This is determined on a case-by-case basis as the staffing need dictates. Please see **Section 1.1 Statement of Objective**, paragraph two (2) for an estimate of spend from the State University System in Florida for the period from July 1, 2013 through June 30, 2015.

7. **QUESTION:** Can you provide the volume and a breakdown of the volume by search category?

ANSWER: There is no volume to provide as it is on a case-by-case basis. At the time an employee leaves their role or position, then the department may requests the services from the pool of potential vendors.

8. **QUESTION:** Can you provide a list of job titles and/or job descriptions that are in scope?

ANSWER: This is fluid and is determined by the need.

9. **QUESTION:** Do we need to be able to provide talent in all the search categories listed to be chosen as a vendor?

ANSWER: No. We will award contracts to multiple vendors and ensure that each category is represented among the awardees outlined in **Section 1.3 Scope of Work and Deliverables, Table 1** of the ITN document.

10. **QUESTION:** How many vendors will be selected?

ANSWER: The determination of the amount of vendors selected will be determined based on the amount of proposals submitted and the evaluation committee during the evaluation process. There is no set number that has been determined. The contract is to be awarded to multiple vendors as outlined in the **Section 1.1 Statement of Objective**.

11. **QUESTION:** If we already have a contract with the State of FL, will this be included under that agreement or will we sign a separate agreement?

ANSWER: The Successful Vendor(s) will sign a master contract for the services outlined in ITN56-001. Any other contracts that vendors have with other entities will not be included under the agreement that results from this process.

12. **QUESTION:** There is no Tab 7 listed in section 1.4 (Solicitation Response). Should we not include a tab 7 or adjust our numbering accordingly throughout the remainder of the response?

ANSWER: Please see the correction below. This section has been revised and the tabs have been renumbered.

Section 1.4 Solicitation Response is hereby deleted and its entirety and replaced with the following:

1.4 Solicitation Response

Each Vendor shall organize its solicitation response to provide the following information in order to assist FIU in the selection, evaluation and award process.

Tab 1 - **Appendix I** Conditions and Requirements, completed and signed, along with Vendor's and any specific requests for changes to terms and conditions, if any.

The Vendor must initial the designated items, in **APPENDIX I**, indicating that the Vendor understands and agrees to the terms and conditions as provided in this competitive solicitation. **If the Vendor wants to request additional language or specific changes to the terms and conditions, Vendor must specifically do so in Vendor's solicitation response and include such requests with APPENDIX I. Requests for additional language or requests for revisions to language in this ITN document must be included in their entirety as part of Vendor's solicitation response under Tab 1 for consideration by FIU. In addition, any documents incorporated by reference in the requests for additional language or request for revisions and any and all forms FIU will need to fill out, prepare or submit to Vendor if awarded the contract must be included in Vendors' solicitation response.**

Please be advised that FIU, as a State university, must adhere to applicable laws and regulations and therefore certain terms and conditions may not be altered.

Tab 2 - Contact information, including name(s), title(s), email address(es), mailing address(es) and phone number(s) for the individual(s) responsible for Vendor's proposal and negotiation during this process. As well as contact information for the individual(s) who should receive any notices related to this contract if awarded to Vendor.

Tab 3 - Corporate Governance Documents, including Vendor's W9 form and Vendor application, available on the FIU Purchasing website at http://finance.fiu.edu/purchasing/2vendor_forms.html, and a Certificate of Good Standing from Vendor's State of Incorporation, if other than Florida.

Tab 4 - **Vendor Experience and Qualifications**

- a. Company Established
- b. The history of the firm, including a listing of principals and firm locations. Include the names of companies that have been incorporated into your firm. Relevant dates should be included as well.
- c. President/Company Executive Officer
- d. Describe your firm's experience conducting searches in higher education or healthcare. Describe experience in any specialty areas where you believe your

firm has unique expertise, including but not limited to Intercollegiate Athletics, Museums, Development/Fundraising/Foundation, Information Technology, Financial/Business Finance/Accounting, Human Resources, Legal, Facilities/Construction/Engineering, Public Relations/Marketing/Governmental Affairs, Sciences, and/or the Arts.

- e. Provide the qualifications of senior professionals in your firm that are likely to be assigned to University searches. Define who will be primarily responsible and have final authority over decisions made in the search of candidates.
- f. Provide an organizational chart with lines of authority for those individuals that will be directly involved in this contract.
- g. Provide at least four references where similar Services to institutions of higher education or healthcare have been provided within the past four years. Include the name of the firm/organization, date of last search closure, the complete mailing address, and the name, telephone number and email address of the contact person.
- h. Provide a list of successful filled positions in the past four years, including the client name, contact information and position(s) filled.

Tab 5 - Search Process.

- a. Describe the firm's search process, including the level and type of participation by the principals/partners. Indicate how you would propose to conduct an effective, timely national search for senior and mid-level administrators and academics at the University. Indicate how your firm would propose to conduct an effective, timely national search for the specialty positions noted. Include a model timeline. Lastly, discuss your methodology in searching for 'hard-to-fill' senior and mid-level positions.
- b. State firm's capabilities in providing assistance during the interview process. Examples of assistance to include but not be limited to: assistance with correspondence between applicants, nominators and nominees, and coordinate interviews of internal and external prospects and the University. Provide a University dedicated website with password protection so that resumes are available to search committees at all times.
- c. Describe in detail the process by which your company verifies all education degrees of candidates. Provide detail on coordination of obtaining credit/financial background check and litigation background check.
- d. Describe how firm handles candidate reference checks.
- e. State the firm's internal screening methodology that produces the most viable candidates (video conference/in person/telephone, etc.). Provide examples of external screening tools in providing possible past controversies with which a candidate has been associated.
- f. Provide to the University a salary comparison of the position among peer institutions early in the process.
- g. Develop and provide the University a timeline for each candidate from search initiation and establishment of expectations through candidate selection, negotiation, and search completion. The timeline should include milestones, activities and deliverables along the interviewing process.

- h. Provide a full list of successful recruiting conclusions and resulting positions by title and institution of higher education or healthcare including any successful positions among the specialty fields noted.
- i. Describe how the firm complies with the Final Rule for Section 503 of the Rehabilitation Act

Tab 6 - **Financial Proposal**

- a. What is your firm's proposed fee for providing the Services? Innovation in fee proposals may set your firm apart from the competition.
 - Would firm consider a fixed fee regardless of the final compensation provided to the successful candidate?
 - Another possible option among others would be to propose a sliding scale, fixed price fee schedule based on final salary package.
 - What expenses are billed to the client?
 - Will there be any mark-up on expenses?
 - Describe in detail the expenses for which it would seek reimbursement.
- b. Vendor should include a fee structure and terms, including provisions for the following:
 - State the fee structure for a successful candidate's voluntary or involuntary termination within the first year of employment.
 - The University's early termination of a search prior to position being filled.
 - Vendor's procedures for a failed search where the firm is unable to provide an adequate pool of candidates.
 - Vendors should provide any price incentive packages for example multiple searches, etc.
 - Vendors should provide fee schedule for all services requested.
- c. Describe how the University will be charged. Include any additional discounts available for early payment of invoices.
- d. Describe how the University will benefit from cost savings by accepting the firm's proposal.
- e. What are the firm's payment terms? The Successful Vendor may indicate payment terms of less than 40 days so long as those terms also contain a cash discount for early payment. For example: "5% 15/Net 40" would correspond to a 5% discount if paid in 15 days, otherwise net 30. The University will compute discounts from the date of completion of services, or from the date the correct invoice is received in Accounts Payable, whichever is later. The University will take the cash discount if payment is made within the specified time frame. Unless alternate payment terms, with cash discounts, are proposed by the Successful Vendor(s), invoices submitted to the University by the Successful Vendor(s) will be paid on a Net 40 days after receipt and approval of the corresponding invoice.
- f. State the firm's capability for accepting electronic payments through Automated Clearing House (ACH) and/or purchasing card, SUA and provide any additional discounts that may result from paying electronically.
- g. Disclose any other fees that may be incurred by the university.

- Tab 7** - The completed and signed competitive solicitation cover document, along with completed and signed Addendum Acknowledgement Forms, if any. The Vendor shall complete, sign and date the cover document, but shall not alter the language provided in this competitive solicitation document or the Addendum(a) in any way; any such alterations are void.
- Tab 8** - Information regarding alternate brands or equivalent products being offered by Vendor, if any.
- Tab 9** - Information regarding subcontractors (list of subcontractors with services to be provided by each and amount Vendor will pay to each; Vendor's certification that subcontractors are appropriately licensed and registered with the State of Florida).
- Tab 10** - **Appendix II**, completed, signed and dated.
- Tab 11** - If applicable, **Appendix IV** - Affidavit of Trade Secret Certification completed and signed by a high level officer of the Vendor as to applicable trade secrets contained in the Vendor's documents; Vendor must segregate and clearly mark all documents certified in Appendix IV and include such documents in this section (tab) of Vendor's proposal.
- Tab 12** - **Insurance** - letter or certificate from Vendor's insurer.
- Tab 13** - Vendor's Services and Warranties, if applicable.
- Tab 14** - Disclosures regarding: (a) Vendor employees having employment relationship with FIU, State of Florida or any Florida State Agencies AND/OR (b) any FIU or State employee(s) owning an interest of 5% or more of Vendor's company or its affiliates or branches.
- Tab 15**- Additional information requested in the competitive solicitation and/or addenda, if applicable.
- Tab 16**- Additional pertinent information Vendor would like to provide.

Section 1.5 Evaluation Points is hereby deleted and its entirety and replaced with the following:

1.5 Evaluation Points

The evaluation criteria and points are provided below.

Table A –

Criteria	Max Points
Vendor Experience and Qualifications	45
Search Process	35
Financial Proposal	20
Evaluation of Solicitation Responses Point Total	100

1.5.1 Evaluation Criteria

1.5.1.2 Vendor Experience and Qualifications

Vendor’s proposal should show evidence that they have the qualifications and experience to perform the scope of services and deliverables outlined in this ITN. The area(s) of expertise for which your firm is proposing to provide services in **Section 1.3 Scope of Services and Deliverables, item#1, Table 1. Search Categories** of this ITN document. Proposals will be evaluated base on the information provided in **Section 1.4, Tab 4 Vendor Experience** as it relates the **Scope of Services and Deliverables** outlined in **Section 1.3 Scope of Services and Deliverables** of the ITN document.

1.5.1.3 Search Process

A detailed description of your firm’s philosophy and approach in conducting searches outlined in **Section 1.4, Tab 5 Search Process**.

1.5.1.4 Financial Proposal

Vendor should provide clear answers to the questions provided in **Section 1.4, Tab 6 Financial Proposal**. Vendor should provide a fee schedule that outlines all services requested.

Greenwood/Asher & Associates, Inc.

EXECUTIVE SEARCH, CONSULTING, AND TRAINING

**EXECUTIVE SEARCH AND RECRUITING SERVICES
PROPOSAL**

for

ITN56-001

Search Firms



December 2015

Vendor Submitting Offer:

Greenwood/Asher & Associates, Inc.

42 Business Center Drive, Suite 206

Miramar Beach, FL 32550

(850) 650-2277

iangreenwood@greenwoodsearch.com

bettyasher@greenwoodsearch.com

TABLE OF CONTENTS

LETTER OF TRANSMITTAL	4
TAB 1: APPENDIX I CONDITIONS AND REQUIREMENTS.....	6
TAB 2: CONTACT INFORMATION.....	9
TAB 3: CORPORATE GOVERNANCE DOCUMENTS	10
G/A&A W9 Form.....	10
TAB 4: VENDOR EXPERIENCE AND QUALIFICATIONS	11
a. Company Established	11
b. History, Principals, Locations	11
c. President/Company Executive Officer	11
d. Experience in Higher Education or Healthcare	11
e. Qualifications of Senior Professionals	13
f. Organizational Chart	17
g. References	19
h. List of Positions Filled in Past Four Years	20
TAB 5: SEARCH PROCESS.....	38
Philosophy and Values of Search	38
Unique Attributes that Distinguish Us as a Leading Higher Education Search Firm	38
a. Firm’s Search Process	39
b. Assistance during the Interview Process	46
c. Background Checking	47
d. Reference Checking.....	47
e. Screening Methodology	48
f. Salary Comparisons.....	48
g. Timeline and Work Plan	49
h. Successful Recruiting Conclusions	51
i. Compliance with Final Rule for Section 503 of the Rehabilitation Act.....	60
Building Diverse Candidate Pools.....	60
TAB 6: FINANCIAL PROPOSAL	74
a. Proposed Fees.....	74
b. Fee Structure and Terms	75
c. Charge Policies.....	76
d. Cost Savings.....	77
e. Payment Terms.....	77
f. Electronic Payments	77
g. Other Fees.....	77

TAB 7: COMPETITIVE SOLICITATION COVER DOCUMENT, ADDENDUM ACKNOWLEDGE FORMS	79
TAB 8: ALTERNATE BRANDS OR EQUIVALENT PRODUCTS.....	82
TAB 9: SUBCONTRACTORS	83
TAB 10: APPENDIX II FROM RFP	84
TAB 11: AFFIDAVIT OF TRADE SECRET CERTIFICATION.....	86
TAB 12: INSURANCE	88
TAB 13: VENDOR’S SERVICES AND WARRANTIES, IF APPLICABLE.....	90
Strategy for Assisting Transition of Successful Candidates	90
TAB 14: DISCLOSURES	91
TAB 15: ADDITIONAL INFORMATION REQUESTED IN THE COMPETITIVE SOLICITATION	92
TAB 16: ADDITIONAL PERTINENT INFORMATION VENDOR WOULD LIKE TO PROVIDE. .	93
Minority, Women & Florida Veteran Business Certification	93
APPENDIX A: Representative List Of Clients We Have Worked with Throughout Our Executive Search and Consulting Experiences	94
APPENDIX B: Greenwood/Asher & Associates, Inc. Facts.....	98
APPENDIX C: Menu Of Leadership And Organizational Consulting Services	100
APPENDIX D: Letter of Reference	101



LETTER OF TRANSMITTAL

December 15, 2015

Kelly Loll
Director of Purchasing
Purchasing Services
Florida International University
Modesto A. Maidique Campus
11200 SW 8th Street
Campus Support Complex – CSC 411
Miami, FL 33199

Dear Ms. Loll and Members of the Purchasing Office Staff:

Thank you for allowing Greenwood/Asher & Associates, Inc. (G/A&A) the opportunity to present a proposal to provide executive search services to Florida International University (FIU) for open positions in a Higher Education environment. We are a woman-owned firm with a diverse consulting team. We have extensive experience in executive search, consulting and training for university systems and campuses. In addition, we have a minority owned consulting firm as a partner. Dr. Betty Turner Asher, co-owner of G/A&A and partner, and I have facilitated more than 2000 searches since 1992. We have both served as tenured professors and presidents of universities.

In addition to our corporate headquarters in Florida, our consultants are located strategically around the United States including California and Metro DC. Dr. Betty Asher and I, along with our consultants and affiliates, bring both an understanding and awareness of the needs of higher education and an ability to reach out nationally and internationally to identify appropriate candidates. Each of our consultants works on an average of three searches at a time. This workload allows quality service for our clients. Our references speak to our highly personalized services 24/7.

As examples of quality results of our searches, we are proud to have recently provided to our clients placements that included four National Academy members (one at an AAU institution and three at non-AAU institutions). Included in these four National Academy placements were a renowned medical doctor and a female dean of engineering. It is very difficult to recruit National Academy Members for universities that are not AAU. We are proud of our repeat client rate of approximately 97% since 1992. Even in the difficult national recruitment climate, which higher education is experiencing due to matters relating to the economy and retirement of senior leaders, the majority of our searches are continuing to close on schedule with our clients getting the candidate of their choice.

We have a deep understanding of higher education in Florida. Since 2001 we have partnered with ten different Florida public institutions for the successful completion of 51 searches, 27 of these with Florida International University. This includes presidents for the University of Florida (twice), Florida International University, Florida Atlantic University and Florida A & M University as well as Chancellors for the Florida Board of Governors and the Florida Department of Education. We have

also found provosts for the University of Florida and Florida A & M University. To exemplify the range of searches we have facilitated for FIU in the past as evidence of our ability to serve searches in all of the categories listed in the scope of work in this RFP, let us provide examples of the types of searches we have facilitated for FIU in the past 14 years. For several positions we have conducted two searches by facilitating a first hire and then after many years of service by that hire, a replacement hire which attests to the satisfaction that units had in our work that they returned to us to conduct the replacement search many years later.

- Associate Dean for Academic Affairs, College of Nursing
- Associate Dean of Research
- Associate Vice President, Enrollment Services
- Chair, Communication Sciences and Disorders
- Chair, Electrical and Computer Engineering
- Chair, Occupational Therapy
- Chair, Physical Therapy Department
- Dean, College of Architecture and the Arts
- Dean, College of Arts and Sciences
- Dean, College of Engineering and Computing
- Dean, College of Nursing and Health Sciences
- Dean, Libraries
- Dean, School of Journalism and Mass Communication
- Director, Graduate Nursing
- Director, Latin American and Caribbean Center
- Director, School of Accounting
- Director, School of Computing and Information Sciences
- Director, Undergraduate Admissions
- Executive Director, MBA Program
- Nursing Faculty (3 Positions)
- President
- Vice President and Chief Information Officer
- Vice President, Human Resources

G/A&A has always, and will in the future, devote sufficient resources to the goal of delivering successful candidates for your search within the contract period. We are committed to abiding by your policies and to being sensitive to your culture regarding search processes. As the list of searches conducted in Florida attest, we are experts in conducting searches within the sunshine law requirements of the state. We would be pleased to present our services to you towards the aim of continuing the rapport and productive working relationship in the future that we have enjoyed with Florida International University in the past. Please contact me at 202-746-6987 if you need clarification on our submission.

Thank you for your consideration of our proposal. We would truly enjoy continuing to work with you to find the right leaders to advance Florida International University through the renewal of this contractual relationship.

Sincerely,



Jan Greenwood, Ph.D.

TAB 1: APPENDIX I CONDITIONS AND REQUIREMENTS

Appendix I Conditions and Requirements, completed and signed, along with Vendor's and any specific requests for changes to terms and conditions, if any.

*The Vendor must initial the designated items, in **APPENDIX I**, indicating that the Vendor understands and agrees to the terms and conditions as provided in this competitive solicitation. **If the Vendor wants to request additional language or specific changes to the terms and conditions, Vendor must specifically do so in Vendor's solicitation response and include such requests with APPENDIX I. Requests for additional language or requests for revisions to language in this ITN document must be included in their entirety as part of Vendor's solicitation response under Tab 1 for consideration by FIU. In addition, any documents incorporated by reference in the requests for additional language or request for revisions and any and all forms FIU will need to fill out, prepare or submit to Vendor if awarded the contract must be included in Vendors' solicitation response.***

Please be advised that FIU, as a State university, must adhere to applicable laws and regulations and therefore certain terms and conditions may not be altered.

APPENDIX I

CONDITIONS AND REQUIREMENTS SUPPLEMENTAL SOLICITATION RESPONSE SHEET

Those items in the following Sections of this competitive solicitation and the Sections of the Appendix III (Sample Contract) must each be initialed under either YES to indicate that the Vendor understands and agrees to the entire Section or NO to indicate that the Vendor does not agree to the entire Section. Failure to complete and return this document with your solicitation response could result in rejection of your solicitation response. Vendors shall not check items as YES (understood and agreed to) for purposes of submitting a solicitation response with the hopes of later negotiating a change of those conditions and requirements. If a Vendor does not understand or agree with any of the conditions or requirements, the Vendor should check NO by the specific provision the Vendor is not in agreement with and provide proposed alternative language or an explanation as to why Vendor is not in agreement with the given provision. Vendor's failure to accept said conditions and requirements is grounds for FIU's rejection of Vendor's solicitation response.

Note: JG are the initials of Jan Greenwood, President and Partner of G/A&A.

SECTION	YES		NO		VENDOR INITIAL
1.0	JG				JG
1.1	JG				JG
1.2	JG				JG
1.3	JG				JG
1.4	JG				JG
1.5	JG				JG
1.6	JG				JG
1.7	JG				JG

<u>SECTION</u>	<u>YES</u>		<u>NO</u>		<u>VENDOR INITIAL</u>
2.0	JG				JG
2.1	JG				JG
2.2	JG				JG
2.3	JG				JG
2.4	JG				JG
2.5	JG				JG
2.6	JG				JG
2.7	JG				JG
2.8	JG				JG
2.9	JG				JG
2.10	JG				JG
2.11	JG				JG
2.12	JG				JG
2.13	JG				JG
2.14	JG				JG
2.15	JG				JG
3.0	JG				JG
3.1	JG				JG
3.2	JG				JG
3.3	JG				JG
3.4	JG				JG
3.5	JG				JG
3.6	JG				JG
3.7	JG				JG
4.0	JG				JG
4.1	JG				JG
4.2	JG				JG
4.3	JG				JG
4.4	JG				JG
4.5	JG				JG
5.0	JG				JG
5.1	JG				JG
5.2	JG				JG
5.3	JG				JG
5.4	JG				JG
5.5	JG				JG
5.6	JG				JG
5.7	JG				JG
5.8	JG				JG
5.9	JG				JG
5.10	JG				JG
5.11	JG				JG

<u>SECTION</u>	<u>YES</u>		<u>NO</u>		<u>VENDOR INITIAL</u>
5.12	JG				JG
5.13	JG				JG
5.14	JG				JG
5.15	JG				JG
5.16	JG				JG
5.17	JG				JG
5.18	JG				JG
5.19	JG				JG
(ENUMERATE T'S AND C'S FROM APPENDIX III- Sample Contract)					
1.	JG				JG
2.	JG				JG
3.	JG				JG
4.	JG				JG
5.	JG				JG
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15.	JG				JG
16.	JG				JG
17.	JG				JG
18.	JG				JG
19.	JG				JG
20.	JG				JG

VENDOR COMPANY NAME Greenwood/Asher & Associates, Inc.

AUTHORIZED SIGNATURE 

TITLE President and Partner

DATE December 14, 2015

TAB 2: CONTACT INFORMATION

Contact information, including name(s), title(s), email address(es), mailing address(es) and phone number(s) for the individual(s) responsible for Vendor's proposal and negotiation during this process. As well as contact information for the individual(s) who should receive any notices related to this contract if awarded to Vendor.

The following information provides information on the individuals responsible for this proposal, for negotiations relating to this proposal, and for any notices related to any contract awarded to Vendor.

G/A&A Partners: Dr. Jan Greenwood and Dr. Betty Turner Asher
Name of Firm: Greenwood/Asher & Associates, Inc.
Main Office Address: 42 Business Center Dr., Suite 206
Miramar Beach, FL 32550
Phone: 850-650-2277
Fax: 850-650-2272
Cell: 202-746-6987
Email: team@greenwoodsearch.com
Email01: jangreenwood@greenwoodsearch.com
Email02: bettyasher@greenwoodsearch.com

TAB 3: CORPORATE GOVERNANCE DOCUMENTS

Corporate Governance Documents, including Vendor's W9 form and Vendor application, available on the FIU Purchasing website at http://finance.fiu.edu/purchasing/2vendor_forms.html, and a Certificate of Good Standing from Vendor's State of Incorporation, if other than Florida.

Greenwood/Asher and Associates, Inc. is registered with the Florida Department of State, Divisions of Corporation. All corporate filings are current and the corporation is in Good Standing. Document #P04000024557. We have also been a registered supplier with FIU since 2008. Our FIU Supplier Registration Number is 17353.

G/A&A W9 Form

Form W-9 (Rev. December 2014) Department of the Treasury Internal Revenue Service	Request for Taxpayer Identification Number and Certification	Give Form to the requester. Do not send to the IRS.
1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Greenwood/Asher & Associates, Inc.	2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ Note: For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>	
5 Address (number, street, and apt. or suite no.) 42 Business Center Drive, Suite 206	6 City, state, and ZIP code Miramar Beach, FL 32550	
7 List account number(s) here (optional)		
Part I Taxpayer Identification Number (TIN) Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3. Note: If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.		
Social security number _____ - _____ - _____		or Employer identification number 2 0 - 0 6 8 5 9 6 0
Part II Certification Under penalties of perjury, I certify that:		
1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and 2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and 3. I am a U.S. citizen or other U.S. person (defined below); and 4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.		
Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.		
Sign Here	Signature of U.S. person ▶ 	Date ▶ 5/11/2015
General Instructions Section references are to the Internal Revenue Code unless otherwise noted. Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/ir9 .		
Purpose of Form An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:		
<ul style="list-style-type: none"> • Form 1099-DIV (dividends, including those from stocks or mutual funds) • Form 1099-MISC (various types of income, prizes, awards, or gross proceeds) • Form 1099-B (stock or mutual fund sales and certain other transactions by brokers) • Form 1099-S (proceeds from real estate transactions) • Form 1099-K (merchant card and third party network transactions) 		
<ul style="list-style-type: none"> • Form 1099 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition) • Form 1099-C (canceled debt) • Form 1099-A (acquisition or abandonment of secured property) Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN. If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See <i>What is backup withholding?</i> on page 2. By signing the filled-out form, you:		
1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued). 2. Certify that you are not subject to backup withholding, or 3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and 4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See <i>What is FATCA reporting?</i> on page 2 for further information.		
Cat. No. 10231X		Form W-9 (Rev. 12-2014)

TAB 4: VENDOR EXPERIENCE AND QUALIFICATIONS

a. Company Established

Dr. Jan Greenwood began as a search consultant in 1992 affiliated with Heidrick & Struggles. Drs. Greenwood and Asher incorporate G/A&A in the State of Florida on February 4, 2004.

b. History, Principals, Locations

The history of the firm, including a listing of principals and firm locations. Include the names of companies that have been incorporated into your firm. Relevant dates should be included as well.

Greenwood/Asher & Associates, Inc. (G/A&A), a retained executive search and consulting firm, has been engaged in the full range of search services for U.S. higher education institutions since 1992 and incorporated as an S-Corporation in the State of Florida in 2004. The founders, Dr. Jan Greenwood and Dr. Betty Turner Asher, and their 35 colleagues comprising G/A&A have been providing executive search and consulting services for over 148 combined years and have completed over 2,000 searches with an estimated repeat client rate of 97% over 23 years. We are a certified women-owned firm by the State of Florida with a diverse consulting team and we have extensive experience in executive search, consulting and training for educational systems and individual educational institutions. We have a minority owned consulting firm as a partner. G/A&A colleagues are predominately women with ethnic and cultural backgrounds from the US, Philippines, Trinidad, Pakistan, Puerto Rico, China and Germany.

The partners of the firm are Drs. Jan Greenwood and Betty Turner Asher. The principals of the firm are Mrs. Christine Channing; Ms. Marion Frenche; Mrs. Julie Holley, Esq.; and Dr. Sharon A. McDade.

The firm's headquarters is in Miramar Beach, FL with consultants located strategically around the United States including offices in California and Metro Washington, DC.

No other companies have been incorporated into G/A&A.

c. President/Company Executive Officer

Dr. Jan Greenwood is President and Partner of G/A&A
Dr. Betty Turner Asher is Vice President and Partner of G/A&A

d. Experience in Higher Education or Healthcare

Describe your firm's experience conducting searches in higher education or healthcare. Describe experience in any specialty areas where you believe your firm has unique expertise, including but not limited to Intercollegiate Athletics, Museums, Development/Fundraising/Foundation, Information Technology, Financial/Business Finance/Accounting, Human Resources, Legal, Facilities/Construction/Engineering, Public Relations/Marketing/Governmental Affairs, Sciences, and/or the Arts.

G/A&A is a retained executive search and consulting firm, has been engaged in the full range of search services for U.S. higher education institutions. We are a full-service firm, which means that we complete the search process from helping the institution to devise a position description, through recruiting, evaluating, completing background checks and assisting the search committee via

recommending candidates for selection. This list covers all of the mandatory services described in your RFP for Scope of Work. We also facilitate the offer process to help ensure that the hiring process is efficient and successful. Finally, through our leadership and organizational development services, we can support institutions through onboarding and transitioning for the candidate and the institutional community.

We have had extensive experience facilitating the full range of searches

- General administrative and senior management positions (e.g., system chancellor and other senior system administrators; campus president, provost and other executive staff, vice presidents, deans)
- Function areas (e.g., student affairs, admissions/enrollment management, information technology, institutional advancement, business and finance, institutional research, general counsel)
- General administrative positions (e.g. division heads, department chairs, program directors)
- Academic and research (e.g. faculty, endowed chairs, heads of research centers and units, staff within the research operations)
- Academic medicine (e.g., deans, senior administrators, endowed chairs, heads of research centers, department chairs, function area heads in areas such as development, research administration and financial management).

We have the employee capacity, time and resources to handle multiple searches simultaneously. In response to Table 1, p. 2 of the RFP, we facilitate the following searches.

Search Categories	G/A&A Has Experience
Intercollegiate Athletics	We have a partner firm with which we work for searches in this field.
Higher Education Senior Level	Yes
Academic Senior Level	Yes
Museum	Yes
Development/Fundraising/Foundation	Yes
Information Technology	Yes
Physician/Medical/Healthcare/Nursing	Yes
Financial/Business Finance/Accounting	Yes
Human Resources	Yes
Legal	Yes
Facilities/Construction/Engineering	Yes
Public Relations/Marketing/Governmental Affairs	Yes
Sciences	Yes
Arts	Yes

We are a full-service firm, which means that we complete the search process from helping the institution to devise a position description, through recruiting, evaluating, completing background checks and assisting the search committee via recommending candidates for selection. We also facilitate the offer process to help ensure that the hiring process is efficient and successful. Finally, through our leadership and organizational development services, we can support the search through onboarding and transitioning for the candidate and the institutional community.

G/A&A is dedicated to providing superior service to our clients and their candidates. Our team members have extensive experience in executive search in educational organizations and institutions.

We have the employee capacity, time and resources to begin work immediately and to fulfill this contract for its duration as requested in the RFP. This capacity will ensure prompt communications with the search committee with timely follow-through on search timelines and obligations.

See [Appendix A](#) for a representative list of clients we have worked with throughout our executive search and consulting experiences. See [Appendix B](#) for G/A&A Facts. See [Appendix C](#) for Menu of Leadership and Organizational Consulting Services.

e. Qualifications of Senior Professionals

Provide the qualifications of senior professionals in your firm that are likely to be assigned to University searches. Define who will be primarily responsible and have final authority over decisions made in the search of candidates.

Our experience in executive search and higher education provides us qualifications for completing your search. The founders, Dr. Jan Greenwood and Dr. Betty Turner Asher, have deep roots in U.S. higher education. Dr. Greenwood and Dr. Asher have both served as university presidents and been full professors. Jan Greenwood has been in the executive search business since 1992 and has conducted more than 600 searches. Dr. Betty Turner Asher, co-owner of G/A&A and partner, our four Principals (Mrs. Chris Channing; Mrs. Julie Holley, Esq.; Ms. Miriam Frenche, and Dr. Sharon A. McDade) and the approximately 35 colleagues comprising G/A&A have been providing executive search and consulting services for over 148 combined years and have completed over 2,000 searches with an estimated repeat client rate of 97% over 23 years.

All G/A&A searches are supervised by Partners Greenwood and Asher who have final authority over decisions made on behalf of the firm. Each project is managed by either a partner or principal. The team for each project is filled out with a consultant, researcher and administrative support members as per availability and workload balance within the firm.

Jan Greenwood, Partner and President (Phone: 202-746-6987)

Education

- Florida State University, Ph.D.
- East Carolina University, M.Ed. and B.S.
- Peace College, AA

Additional credentials

- Harvard's Institute for Educational Management
- Trained in England on Tavistock group methods
- Licensed psychologist in Ohio

Executive search experience

- Led strategy and implemented searches for approximately 21 years as partner, director, and vice president in the Washington, D.C. and Alexandria offices of two different international search firms
- Conducted hundreds of searches for executives in education, health care, nonprofit, information technology, and for corporate boards

Educational experience

- University president in both private and public higher education institutions
- Library named in honor of presidency at Virginia institution

- Earned tenure and full professor
- K-12 experience as a high school teacher and counselor

Career professional achievements and activities

- Member, Monmouth University Board of Trustees, Educational and Faculty Affairs Committee and Executive Committee
- Former board member for symphony, opera, ballet, United Way, Regional Plan Association, YWCA
- Founding President of the Long Island Sound Foundation
- Former member of corporate board of the Aquarion Company - Served as Chair of the Environmental, Community & Government Relations Committee and member of the Audit Committee
- Former Board & Executive Committee member, American Council on Education
- Former member, Association of Governing Boards President's Advisory Committee and their Commission on Strengthening Presidential Leadership
- Former Chair, American Association of State Colleges and Universities Policy & Purposes Committee
- Former member, Southern Governors' Association Advisory Council on International Education
- Former Chair, Council of Presidents for Virginia Public Higher Education
- Chair, American Council on Education Executive Search Roundtable
- Secretary, Seascape Board of Directors
- Vice Chair, Majestic Sun Board of Directors

Betty Turner Asher, Partner and Vice President (Phone: 850-337-1488)

Education

- University of Cincinnati, Ed.D.
- Western Kentucky University, M.A.
- Eastern Kentucky University, B.A.

Additional credentials

- Studied at Harvard's Institute for Educational Management
- Dartmouth's Executive Management Institute

Executive search experience

- Partnered with Dr. Greenwood and consultants on more than 500 searches

Educational experience

- President, Vice President for Student Affairs, Associate Vice President for Academic Affairs, and other university leadership positions
- Professor of Educational Psychology and Counseling, Associate Professor Counselor Education, and other university teaching positions
- High school English teacher

Career professional achievements and activities

- Owned and served as President of training and consulting firm
- Served on Corporate Boards
- Consultant for Accrediting Commissions
- National Advisory Board of Insuring Tomorrow, National Leadership Inc.

- Presidential Network on International Education, ACE
- Board of Directors, Children's Care Hospital and School Foundation and Sioux Valley Hospital
- Board of Directors, Vermillion Development Corporation
- Board of Directors, Karl E. Mundt Foundation
- Board of Directors, Neuharth Advisory Board
- President's Commission, NCAA

Christine Channing, Principal and Executive Search Consultant (Phone: 850-650-5282)

Education

- University of Louisville, B.A. English

Executive search experience

- In over ten years, assisted on more than 60 higher education searches from chief academic officers to department chairs with specialization in dean searches, multiple searches, and searches for founding leaders of academic units
- Chaired search committees

Educational experience

- Teaching assistant at certified Montessori school

Career professional achievements and activities

- Financial consultant for representatives of a multi-billion dollar corporation in Cincinnati, Ohio
- Conducted leadership training for undergraduates
- Officer for national leadership groups for undergraduates

Marion Frenche, Principal & Practice Leader for Diversity, Equity and Inclusion (Phone: 301-292-6615)

Education

- Columbia Union College, B.S. (Degree near completion) education and administration

Executive search experience

- Managed searches for two of the largest international search firms in the Washington, D.C. metropolitan area
- Completed more than 200 searches for executives in education, health care, and information technology in public and private universities, colleges and schools, as well as nonprofit associations and organizations
- Facilitated successful searches for presidents and senior administrative officers for HBCU's, including Florida A&M University, Morgan State University, University of Maryland Eastern Shore, University of Maryland Eastern Shore, Central State University, West Virginia State University, Virginia State University, Mississippi Valley State University, Coppin State University, Cheyney University of Pennsylvania, Alcorn State University, Bowie State University and Albany State University.
- Facilitated searches for a wide range of medically-related positions, including senior leadership, department chairs, endowed chairs, and faculty in higher education and medical institutions.

Career professional achievements and activities

- Conducted executive training with the major health care facilities and hospitals within Northern Virginia and Southern Maryland
- Presented at national conferences and professional meetings on the search process, with particular emphasis on the nature of the search process for minority candidates.

Julie Holley, Principal and Executive Search Consultant (Phone: 850-337-1473)

Education

- University of Baltimore, School of Law, Baltimore, Maryland, J.D. Law
- American University, Washington, D.C., B.A.

Executive search experience

- Eight years of higher education executive search work with specialization in presidential searches, with particular expertise in Master's level, comprehensive and rural institutions.
- Assisting on more than 100 higher education searches, from president/chancellor to department chairs
- Other specializations in law dean and general counsel positions

Educational and career work experience

- Specialized in real estate work both Commercial and Private; including closings, foreclosures, quiet title and partition suits, and research of titles
- Handled trust and estate work and corporate work
- Law clerk state regulatory agency
- Law clerk private law firm
- Staff intern to U.S. Representative

Career professional achievement and activities

- Former member and Secretary of Board of Directors for local YMCA

Sharon A. McDade, Principal and Senior Executive Leadership and Search Consultant (Phone: 703-567-3388)

Education

- Harvard University, Ed.D. Administration, Planning and Social Policy
- Ohio State University, M.F.A.
- Miami University, B.S.

Leadership Development and Search Experience

- Director, Emerging Leaders Group and Fellows Program, American Council on Education
- Director, Harvard University Institute for Educational Management; creator and director, Harvard University Management Development Program; co-creator Harvard University Seminar for New Presidents
- Founder, director, founding board member, and external evaluator for leadership development programs serving state higher education systems, national associations, national banking company, and the U.S. Department of Justice. Consultant, teacher, and facilitator for dozens of other U.S. higher education leadership programs.
- Search consultant with Greenwood/Asher & Associates

Academic Experience

- Tenured professor and faculty member, and Coordinator and Principal Adviser, higher education administration graduate programs, private Research I universities. Professorial positions at public land-grant university and private comprehensive institutions.
- Chaired 60+ doctoral dissertations on issues relating to higher education administration and leadership development
- Co-creator and Director, Center for Educational Leadership and Transformation, George Washington University
- Extensive research and scholarship in numerous books, refereed journal articles, and conference presentations on higher education leadership and organizational development, leadership pipeline issues, and higher education administration.
- Grant funding to create, research, and assess impact of leadership development programs and to investigate higher education leadership pipeline issues in the U.S., England, Mexico, and South Africa

Career professional achievements and activities

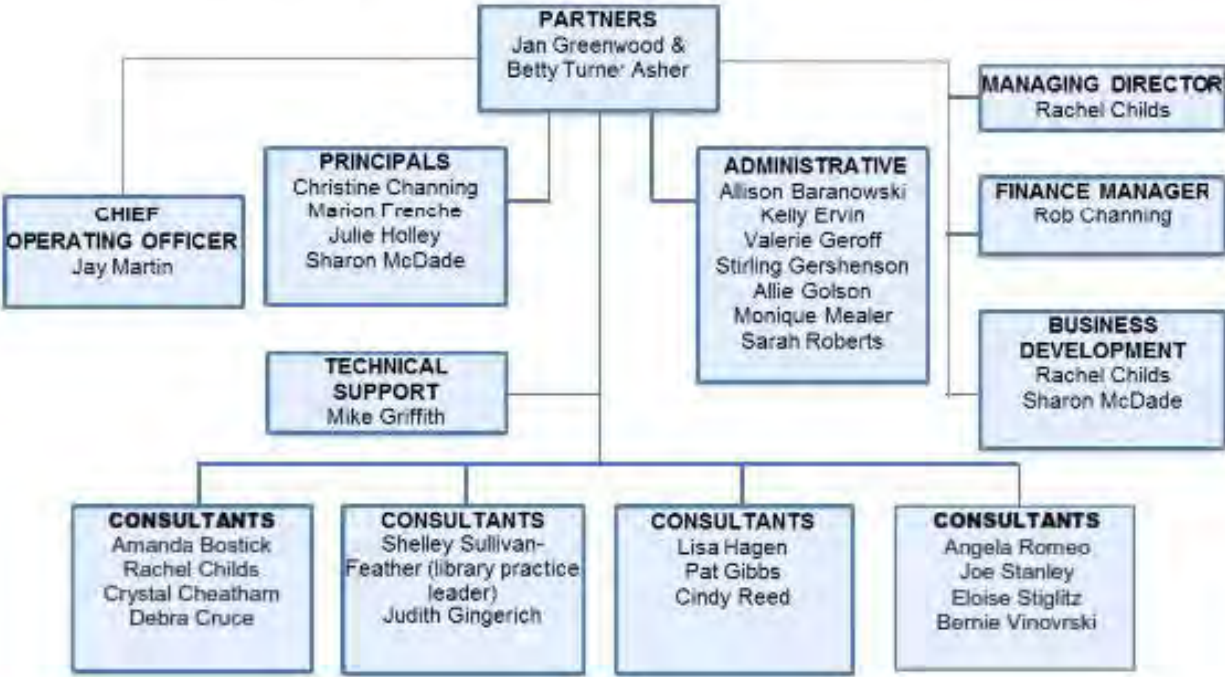
- Keynote speeches to annual meetings and conferences in the U.S., Brazil, Canada, Chile, Columbia, England, Kazakhstan, Mexico, Nigeria, South Africa, and Venezuela, regarding leadership and career development in higher education. Additional leadership development work in Belarus, Ukraine, and Soviet Union.
- Senior scholar positions with national associations, Harvard University Lehman Scholar, Harris and Eliza Kempner Foundation Scholar
- Excellence in Teaching top award at Teachers College, Columbia University; numerous teaching commendations
- Editorial board for scholarly journals in higher education, women in higher education, and department chairs; consulting editor for *Change Magazine* and *The Department Chair Newsletter* (Jossey Bass).
- Advisory boards/committees for NIH and other grant projects, higher education leadership fellowship programs
- Board of directors, American Association for Higher Education

f. Organizational Chart

Provide an organizational chart with lines of authority for those individuals that will be directly involved in this contract.

Greenwood/Asher & Associates, Inc.
 EXECUTIVE SEARCH, CONSULTING, AND TRAINING

ORGANIZATIONAL CHART



g. References

Provide at least four references where similar Services to institutions of higher education or healthcare have been provided within the past four years. Include the name of the firm/organization, date of last search closure, the complete mailing address, and the name, telephone number and email address of the contact person.

Dr. James P. Clements

President

Clemson University

Office of the President

201 Sikes Hall,

Clemson, SC 29634

Phone: 864-656-3413

Email: president@clermson.edu

Note: Placement and ongoing client as President of Clemson University and Former President at West Virginia University

Dr. Kenneth G. Furton

Provost and Executive Vice President

Florida International University

Miami, FL 33199

Phone: 305-348-2151

Email: Kenneth.Furton@fiu.edu

Note: Ongoing client for many searches of varying types at Florida International University

Jamie Lewis Keith, Esq.

Vice President, General Counsel and University Secretary

University of Florida

P.O. Box 113125-3157

Gainesville, FL 32611-3157

Phone: 352-392-1358

Email: jlkeith@ufl.edu

Note: Contact person for University of Florida president search completed in December 2014

Mr. Steven Scott

Chair, Board of Trustees

University of Florida

226 Tigert Hall

PO Box 113150

Gainesville, FL 32611

Phone: 352-392-1311

Note: Chair, Search Committee for University of Florida president search completed in December 2014. See [Appendix D](#) for letter of reference.

h. List of Positions Filled in Past Four Years

Provide a list of successful filled positions in the past four years, including the client name, contact information and position(s) filled.

See following table. As the salary data for most of our searches are confidential, we do not provide that information here. We can draw upon our salary data for studies in service to search committees that wish comparative salary data for a specific search.

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Park University	Provost	12/9/2015	Fiore, Douglas J.	Fowler, David M.	(816) 584-6202	david.fowler@park.edu
University of Nebraska Omaha	Dean, Criss Library	12/2/2015	Richards, David	Baker, Gail F.	(402) 554-2232	gbmccarty@msn.com
University of Texas-Rio Grande Valley	Dean, College of Engineering and Computer Science	11/24/2015	Domijan, Jr., Alexander	Bailey, Guy	(512) 499-4200	gbailey1@aol.com
Metropolitan State University of Denver	Associate Vice President for Enrollment Management	11/24/2015	Kester, Lori	Golich, Vicki L.	(303) 556-3040	vgolich@msudenver.edu
Towson University	Chair, Department of Nursing	11/20/2015	Mark, Hayley D.	Plowfield, Lisa	(410) 704-2132	lplowfield@comcast.net
University of New Mexico	VP of Alumni Relations & Exec Dir of the Alumni Association	11/13/2015	Allen, Dana	Atencio, David	(505) 277-3757	atencio1@unm.edu
Florida A & M University	Dean, College of Education	11/11/2015	Taylor-Webb, Traki L.	David, Marcella	(850) 599-3276	marcella.david@famuc.edu
South Carolina Governor's School for Science and Mathematics	President	10/31/2015	Flores, Hector E.	Davis Sr., Leroy	(803) 780-1349	ldavis@voorhees.edu
University of Pikeville	President	10/23/2015	Webb, Burton J.	Dotson, Terry	(606) 874-2172	terry.dotson@thetruckpeople.com
University of Arkansas, Fayetteville	Chancellor	10/15/2015	Steinmetz, Joseph E.	Ferguson, Ellen	(479) 575-2551	ellenf@uark.edu
Chicago State University	President	10/13/2015	Calhoun, Thomas C.	Mitchell, Renee	(773) 995-2040	rmitch26@csu.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Florida A & M University	Director, Black Archives Research Center	10/9/2015	Madyun, Nashid	David, Marcella	(850) 599-3276	marcella.david@famuc.edu
Kentucky Board of Education	Commissioner	9/23/2015	Pruitt, Stephen	Stratton, Tom	(502) 564-2351	KDERFP@education.ky.gov
The Ohio State University	Associate Dean for Extension	9/18/2015	Rennekamp, Roger A.	Krygier, Melissa G.	(614) 688-3736	krygier.1@osu.edu
Clemson University	Associate Provost & Dean of Undergraduate Studies	9/14/2015	Griffin, John D.	Jones, Robert H.	(864) 656-3940	provost@clemson.edu
Georgia State University	Dean, Libraries	8/25/2015	Steely, Jeffrey	Palm, Risa I.	(404) 413-2574	risapalm@gsu.edu
The Ohio State University	Associate Dean for Research, College of Dentistry	8/6/2015	Bartlett, John D.	Lloyd, Patrick M.	(614) 292-9755	Lloyd.256@osu.edu
University of Virginia's College at Wise	Vice Chancellor for Development and College Relations	7/28/2015	Bragg, Robert Stanley	Henry, Donna	(276) 328-0122	djphenry@comcast.net
Washington State University	Vice President and Chief Technology Officer	7/27/2015	Pillay, Sasi K.	Floyd, Elson S.	Deceased	Deceased
Georgia State University	Dean, Byrdine F. Lewis School of Nursing	7/13/2015	Kropf, Nancy	Palm, Risa I.	(404) 413-2574	risapalm@gsu.edu
LeMoyne-Owen College	President	6/12/2015	Miller, Andrea Lewis	Lipscomb, Robert	(901) 544-1100	robert.lipscomb@memphistn.gov
University of Missouri - Kansas City	Provost	6/4/2015	Bichelmeyer, Barbara A.	Morton, Leo E.	(816) 235-1000	mortonle@umkc.edu
University of South Dakota	Dean, School of Education	6/3/2015	Easton-Brooks, Donald R.	Moran, James D	(605) 677-6497	Jdmoran3@aol.com

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
East Tennessee State University	Vice President for Advancement	6/1/2015	Ritter, Pamela Sue	Noland, Brian	(423) 439-4211	president@etsu.edu
University of California, Davis	Vice Provost for Global Affairs	6/1/2015	Regulska, Joanna	Hexter, Ralph J.	(530) 752-2065	hexter@ucdavis.edu
University of Texas-Rio Grande Valley	Dean of Education	5/29/2015	McHatton, Patricia M. Alvarez	Rodriguez, Havidan	(956) 665-2100	president@utpa.edu
University of Idaho	Vice President for University Advancement	5/28/2015	McFadden, Mary Kay	Staben, Chuck	(208) 885-6365	president@uidaho.edu
Southwest Tennessee Community College	President	5/27/2015	Hall, Tracy D.	Morgan, John G.	(615) 366-4403	john.morgan@tbr.edu
University of Texas-Rio Grande Valley	Dean of Science and Mathematics	5/21/2015	Grewal, Parwinder S.	Bailey, Guy	(512) 499-4200	gbailey1@aol.com
University of North Texas	Dean, College of Visual Arts and Design	5/21/2015	Watts, Greg	Burggren, Warren	(940) 565-2550	Warren.Burggren@unt.edu
Minnesota State Colleges and Universities	Vice Chancellor of Academic and Student Affairs	5/21/2015	Anderson, Ron	DeFord, Victoria	(651) 201-1664	Deford@so.mnscu.edu
Chattanooga State Community College	President	5/20/2015	Tydings, Flora W.	Morgan, John G.	(615) 366-4403	john.morgan@tbr.edu
University at Albany	Dean, School of Criminal Justice	5/18/2015	Pridemore, William Alex	Phillips, Susan D.	(518) 956-8030	Sdphil@Uamail.Albany.edu
University of Texas-Rio Grande Valley	Dean of Liberal Arts	5/15/2015	Diaz, Walter R.	Bailey, Guy	(512) 499-4200	gbailey1@aol.com
Florida State University	Dean, Panama City Campus	5/15/2015	Edwards, Carol D.	Stokes, Garnett S.	(573) 882-6596	stokesg@missouri.edu
Virginia Poly Inst. & State University	Executive Vice President and Provost	5/14/2015	Rikakis, Thanassis	Sands, Timothy D.	(540) 231-6231	president@vt.edu
Clemson University	Dean of Libraries	5/13/2015	Farrell, Mary	Jones, Robert H.	(864) 656-3940	provost@clemson.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Montgomery College	Senior Vice President for Student Services	5/12/2015	Brown, Monica	Cain, Stephen D.	(240) 567-5000	stephen.cain@montgomerycollege.edu
Sam Houston State University	Dean, College of Criminal Justice	5/11/2015	Lyons, Phillip	Hebert, Jaimie L.	(936) 294-1401	hebert@shsu.edu
University of Miami	Director, Counseling Center	5/11/2015	Monteagudo, Rene	Whitely, Patricia A.	(305) 284-4922	pwhitely@miami.edu
Lyrasis	Executive Director	5/6/2015	Miller, Robert	Henderson, Cynthia	(202) 884-1723	cynthia.henderson@howard.edu
Florida State University	Dean, College of Social Work	4/30/2015	Clark, James J.	Stokes, Garnett S.	(573) 882-6596	stokesg@missouri.edu
University at Albany	Dean, School of Social Welfare	4/30/2015	Wheeler, Darrell	Phillips, Susan D.	(518) 956-8030	Sdphil@Uamail.Albany.Edu
University of Maryland Medical System	Chief Development Officer, Shock Trauma	4/28/2015	Klicos, Dina	Eisele, Janice	(410) 328-5061	jeisele@umm.edu
University of Wisconsin - Platteville	Dean of Engineering	4/27/2015	Gribb, Molly M.	Den Herder, Mittie Nimocks	(608) 342-1261	denherderm@uwplatt.edu
Charles Drew Univ. of Medicine & Science	Provost	4/24/2015	Michael, Steve O	Carlisle, David	(323) 563-4987	davidcarlisle@cdrewu.edu
University of Louisiana at Lafayette	Chief Human Resource Officer	4/22/2015	Thomas, Paul D.	LeBlanc, Jerry	(337) 482-6235	jerrylukeleblanc@louisiana.edu
Lamar University	Dean, College of Fine Arts and Communication	4/6/2015	Holtzhausen, Derina R.	Evans, Kenneth R.	(409) 880-8405	kevans4@lamar.edu
West Virginia State University	Chief Financial Officer	3/31/2015	Featherstone, William H.	Hemphill, Brian O.	(304) 766-3112	bhemphill@wvstateu.edu
Iowa State University	Dean of Libraries	3/27/2015	McNeil, Beth	Wickert, Jonathan	(515) 294-0070	wickert@iastate.edu
Lamar University	Dean, College of Education and Human Development	3/27/2015	Spina, Robert	Evans, Kenneth R.	(409) 880-8405	kevans4@lamar.edu
Winona State University	Vice President for Enrollment Management and Student Life	3/27/2015	McDowell, Denise	Olson, Scott R.	(507) 457-5003	solson@winona.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Northeast Higher Education District	President	3/19/2015	Maki, William	Rosenstone, Steve	(651) 296-8012	chancellor@so.mnscu.edu
Northland Community & Technical College	President	3/19/2015	Bona, Dennis J.	Rosenstone, Steve	(651) 296-8012	chancellor@so.mnscu.edu
Ferris State University	President, Kendall College of Art and Design	3/19/2015	Bellavance, Leslie	Eisler, David	(231) 591-2500	eislerd@ferris.edu
Kutztown University of Pennsylvania	President	3/18/2015	Hawkinson, Kenneth Steven	Brogan , Frank T.	(717) 720-4010	fbrogan@passhe.edu
Albany College of Pharmacy & Health Science	Provost	3/16/2015	Patel, Tarun B.	Dewey, Gregory	(518) 694-7255	Greg.dewey@acphs.edu
Lamar University	Dean, College of Engineering	3/12/2015	Palanki, Srinivas	Evans, Kenneth R.	(409) 880-8405	kevans4@lamar.edu
Lamar University	Provost and Vice President for Academic Affairs	2/20/2015	Marquart, James	Evans, Kenneth R.	(409) 880-8405	kevans4@lamar.edu
Mountain View College	President	2/17/2015	Garza, Robert	May, Joe	(214) 860-2125	joemay@joemayhighered.com
University of Texas at San Antonio	Vice Provost and Dean of the Graduate School	2/5/2015	Agbenyiga, DeBrenna	Frederick, John	(210) 458-4011	John.Frederick@utsa.edu
University of Wisconsin - Madison	Director of Purchasing Services	1/25/2015	Nelson, David L.	Kerner, Martha	(608) 262-0063	mkerner@bussvc.wisc.edu
Kent State University Trumbull Campus	Dean and Chief Administrative Officer	1/22/2015	Grahn, Lance	Thomas, Wanda	(330) 675-8821	wthomas4@kent.edu
Winona State University	Vice President for University Advancement	1/22/2015	Hughes, Ernie Troy	Olson, Scott R.	(507) 457-5003	solson@winona.edu
Virginia Commonwealth University	Provost and Senior Vice President for Academic Affairs	1/15/2015	Hackett, Gail	Rao, Michael	(804) 828-1200	rao1m@vcu.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
University of Maryland Medical System	Chief Development Office, Cancer Center	1/14/2015	Malstrom, Thomas	Eisele, Janice	(410) 328-5061	jeisele@umm.edu
University of Missouri - Kansas City	Dean, Honors College	1/8/2015	McKusick, James	Hackett, Gail	(804) 828-0100	ghackett@vcu.edu
Tennessee Technological University	Dean of Business	12/31/2014	McKusick, James	Ghorashi, Bahman	(931) 372-3224	bghorashi@tntech.edu
Iowa State University	Director, School of Education	12/31/2014	Strathe, Marlene	White, Pamela	(515) 294-5380	pjwhite@iastate.edu
Association of College Unions Intl	Executive Director and CEO	12/31/2014	Taylor, John	Herman-Betzen, Marsha	(812) 245-8052	mherman@acui.org
North Lake College	President	12/31/2014	Slejko, Christa	May, Joe	(214) 860-2125	joemay@joemayhighered.com
Morgan State University	Provost and Senior Vice President	12/31/2014	Gibson, Gloria	Wilson, David	(443) 885-3200	david.wilson@morgan.edu
Morgan State University	Vice President for Finance and Management /CFO	12/31/2014	Evans, Jr., Sidney H.	Wilson, David	(443) 885-3200	david.wilson@morgan.edu
University of Houston	Dean, Conrad Hilton College of Hotel and Restaurant Management	12/16/2014	Reynolds, Dennis	Short, Paula Myrick	(832) 842-0550	Not public
Florida A & M University	Provost and Vice President for Academic Affairs	11/28/2014	David, Marcella	Mangum, Elmira	(850) 599-3225	emangum1@twcny.rr.com
Tennessee Technological University	Dean, School of Nursing	11/19/2014	Tzeng, Huey-Ming	Ghorashi, Bahman	(931) 372-3224	bghorashi@tntech.edu
Remington College School of Nursing	Dean, School of Nursing	11/10/2014	Pennington, Tony	Polifko, Karin A.	(407) 562-9100	kpolifko@cox.net
Texas Tech University	Dean of Libraries	10/27/2014	Gerlich, Bella	Rallo, Joseph C.	(225) 342-4253	bella.k.gerlich@ttu.edu
American Educational Research Association	Director of Government Relations	10/1/2014	Baron, Juliane	Levine, Felice	(202) 238-3201	flevine@aera.net

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Washington State University	Director, School of Politics, Philosophy, and Public Affairs	9/27/2014	Glazebrook, Patricia	DeWald, Daryll	(509) 335-5540	daryll.dewald@wsu.edu
Montana State University	Vice President of Agriculture and Dean for the College of Agriculture	9/22/2014	Boyer, Charles D.	Potvin, Martha A.	(406) 994-3600	marthapotvin@gmail.com
University of Massachusetts Dartmouth	Dean, College of Arts and Sciences	9/16/2014	Riley, Jeannette	Karim, Mohammad A.	(757) 683-3460	mkarim@odu.edu
University of Texas at El Paso	Dean of the College of Education	9/10/2014	Giorgis, Cynthia Cyndi	Gonzales, Junius	(915) 747-5725	jjxg@earthlink.net
University of New Mexico	Vice President for Human Resources	9/2/2014	Anderson, Dorothy T.	Frank, Robert G.	(505) 277-0111	rgfrank25@gmail.com
University of California, Davis	Dean, UC Davis Extension	8/31/2014	McNeil, Paul M.	Hexter, Ralph J.	(530) 752-2065	hexter@ucdavis.edu
University of Missouri - Kansas City	Dean of Medicine	8/8/2014	Kanter, Steven L.	Hackett, Gail	(804) 828-0100	ghackett@vcu.edu
Morgan State University	Chief Information Officer	8/5/2014	Oladipupo, Adebisi	Wilson, David	(443) 885-3200	david.wilson@morgan.edu
El Centro College	President	8/5/2014	Adames, José	May, Joe	(214) 860-2125	joemay@joemayhighered.com
University of Cincinnati	Chief Risk Officer	7/22/2014	Ingram, Anita C.	Faulkner, Kenya Mann	(513) 556-3483	kenyamesq@gmail.com
University of Baltimore	Dean, Merrick School of Business	7/14/2014	Dalziel, Murray M.	Wood, Joseph	410-837-5244	jswood@ubalt.edu
Georgia College & State University	J. Whitney Bunting Dean College of Business	7/14/2014	Payne, James E.	Brown, Kelli	(478) 445-4715	kelli.brown@gcsu.edu
University of Kansas	Vice Provost for Diversity and Equity	7/14/2014	Thomas, Emanuel	Vitter, Jeffrey S.	(785) 864-4904	jeffvitter@gmail.com
University of Minnesota - Rochester	Vice Chancellor for Academic Affairs and Student Development	7/8/2014	Carrell, Lori J.	Lehmkuhle, Stephen	(507) 258-8001	lehmk007@umn.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Austin Peay State University	President	6/19/2014	White, Alisa	Morgan, John G.	(615) 366-4403	john.morgan@tbr.edu
Lehigh Carbon Community College	President	6/19/2014	Bieber, Ann D.	Larvey, Audrey	(610) 799-1107	Not public
Minnesota State University, Moorhead	President	6/19/2014	Blackhurst, Anne	Rosenstone, Steven	(651) 201-1696	steven.rosenstone@so.mnscu.edu
University of Memphis	President	6/19/2014	Rudd, M. David	Morgan, John G.	(615) 366-4403	john.morgan@tbr.edu
University of North Carolina at Greensboro	Provost	6/19/2014	Dunn, Dana	Brady, Linda P.	(336) 334-5266	lpbrady@uncg.edu
Northern Virginia Community College	Dean, Division of Communications & Human Studies	5/22/2014	O'Brien, Catherine	Leidig, Julie	(703) 450-2517	jleidig@nvcc.edu
University of Massachusetts Dartmouth	Dean, College of Nursing	5/21/2014	Christopher, Kimberly	Karim, Mohammad A.	(757) 683-3460	mkarim@odu.edu
Kent State University	Dean and Chief Administrative Officer	5/16/2014	Bielski, Bradley A.	Diacon, Todd	(330) 672-2121	tdiacon@kent.edu
University of Texas at San Antonio	Dean, College of Engineering	5/9/2014	Browning, JoAnn	Frederick, John	(210) 458-4011	John.Frederick@utsa.edu
Washington State University	CEO of the Foundation	5/7/2014	Gardner, John C	Floyd, Elson S.	Deceased	Deceased
University of Wisconsin - Platteville	Executive Director of Institutional Effectiveness and Assessment	5/2/2014	Daniels, Nettie	Den Herder, Mittie Nimocks	(608) 342-1261	denherderm@uwplatt.edu
Texas Tech University	Dean, College of Arts and Sciences	4/24/2014	Lindquist, W. Brent	Nellis , Duane M.	(806) 742-2011	duane.nellis@ttu.edu
Georgia State University	Dean, College of Education	4/24/2014	Alberto, Paul A.	Palm, Risa I.	(404) 413-2574	risapalm@gsu.edu
Texas Tech Health Sciences at El Paso	President and Dean	4/21/2014	Lange, Richard	Hance, Kent R.	(806) 742-0012	kent.hance@ttu.edu
Sam Houston State University	Dean, Humanities and Social Sciences	4/15/2014	Zink, Abbey	Hebert, Jaimie L.	(936) 294-1401	hebert@shsu.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
University of Texas Arlington	Dean, College of Nursing	4/4/2014	Bavier, Anne	Elsenbaumer, Ronald L.	(817) 272-2103	elsenbaumer@uta.edu
West Virginia University	Dean of Libraries	4/2/2014	Cawthorne, Jon	Wheatly, Michele G.	(304) 293-5701	michelegwheatly@gmail.com
West Virginia State University	Provost and Vice President for Academic Affairs	4/2/2014	Jayasuriya, Kumara	Hemphill, Brian O.	(304) 766-3112	bhemphill@wvstateu.edu
Bucks County Community College	Provost	4/1/2014	Railey, III, Clayton A.	Shanblatt, Stephanie	(215) 968-8222	shanblat@bucks.edu
George Mason University	Provost and Executive Vice President	3/18/2014	Wu, S. David	Cabrera, Angel	(703) 993-8700	president@gmu.edu
University of Massachusetts Dartmouth	CFO and Vice President for Finance and Administration	3/13/2014	Preble, Mark	Grossman, Divina Gracia	(508) 999-8004	dgrossman@umassd.edu
University of Missouri - Kansas City	Dean, Henry L. Bloch School of Management	3/4/2014	Donnelly, David P.	Hackett, Gail	(804) 828-0100	ghackett@vcu.edu
Louisiana State University	Dean, E.J. Ourso College of Business	3/3/2014	White, Richard D.	Bell, Stuart R.	Not public	srbell@sunflower.com
New Mexico State University	Vice President for Advancement	2/20/2014	Harrelson, Cheryl	Carruthers, Garrey	(575) 646-2035	president@nmsu.edu
Tennessee Technological University	Director of Human Resources	2/19/2014	Brooks, John M.	Oldham, Philip	Not public	Not public
New School of Architecture & Design	President	2/19/2014	Marick, Gregory J.	Sanchez, Vivian	Not public	vsanchezg@aol.com
Louisiana State University	Vice President for Finance and Administration	2/19/2014	Layzell, Daniel T.	Alexander, F. King	(225) 578-2111	king.alexander22@yahoo.com
Northern Virginia Community College	Director of Human Resources	1/31/2014	Garcia, Julie	Marks, Michelle A.	(703) 764-5005	mmarks@nvcc.edu
University of Alabama in Huntsville	Provost and Executive Vice President for Academic Affairs	1/21/2014	Curtis, Christine	Altenkirch, Robert	(256) 824-6340	bobaltenkirch@optonline.net

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Texas Tech University	Provost and Senior Vice President for Academic Affairs	1/13/2014	Schovanec, Lawrence	Nellis , Duane M.	(806) 742-2011	duane.nellis@ttu.edu
Dallas County Community College District	Chancellor	1/3/2014	May, Joe	Prater, Jerry	(214) 860-2125	Not public
Montana State University	Dean, College of Engineering	12/17/2013	Gunnink, Brett	Potvin, Martha A.	(406) 994-3600	marthapotvin@gmail.com
Cleveland State University	Director of Admissions	12/3/2013	Furbeck, Lee	Spademan, Rob	(216) 523-7284	r.spademan@csuohio.edu
Virginia Poly Inst. & State University	Director of University Design and Construction	12/1/2013	LaClair, Leigh	Wilson, Sherwood G.	(540) 231-4416	sgwilson@vt.edu
Georgia College & State University	Vice President for University Advancement	12/1/2013	Delisa, Monica	Jones, Paul A.	(229) 317-6705	pjones_jonesp@yahoo.com
Albany College of Pharmacy & Health Science	President	11/14/2013	Dewey, Gregory	Chorbajian, Herb	Not public	Not public
Montana State University	Vice President for Research, Creativity and Technology Transfer	10/24/2013	Reijo Pera, Renee A.	Cruzado-Salas, Waded	(406) 994-2341	president@montana.edu
University of Wyoming	Vice President for Administration	10/15/2013	Mai, Bill	Sternberg, Robert	Not public	Not public
University of Wyoming	University General Counsel	8/30/2013	Miller, Rick	Sternberg, Robert	Not public	Not public
Martin University	President	8/26/2013	Miller, III, George E.	Bartlett, John	(317) 543-3235	jbh95@vzw.blackberry.net
North Dakota University System Office	Vice Chancellor for Academic Affairs	8/20/2013	Lesch, William C	Shirvani, Hamid Augustine	Not public	dr.hshirvani@icloud.com

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
West Virginia University	Vice President for University Relations	8/8/2013	Martin, Sharon L.	Clements , James P	Not public	president@clemsun.edu
Pennsylvania State System of Higher Education	Chancellor	8/7/2013	Brogan , Frank T.	Pichini, Guido	Not public	Not public
Western Michigan University	Dean, College of Fine Arts	8/2/2013	Guyette, Daniel	Greene, Timothy J.	(269) 387-2380	tjg49071@gmail.com
Sam Houston State University	Dean, College of Fine Arts and Mass Communication	8/2/2013	Shields, Ronald	Hebert, Jaimie L.	(936) 294-1401	hebert@shsu.edu
Tennessee Board of Regents Office	Vice Chancellor for Academic Affairs	8/2/2013	Denley, Tristan	Morgan, John G.	(615) 366-4403	john.morgan@tbr.edu
George Mason University	Vice President for University Development and President	8/2/2013	Bingham, Janet E.	Cabrera, Angel	(703) 993-8700	president@gmu.edu
Western Michigan University	Dean, College of Education and Human Development	7/22/2013	Li, Ming	Greene, Timothy J.	(269) 387-2380	tjg49071@gmail.com
The Ohio State University	Dean, College of Public Health	7/22/2013	Martin, William J.	Alutto, Joseph	(614) 292-5881	alutto.1@osu.edu
Cheyney University of Pennsylvania	Provost & Vice President for Academic Affairs	6/27/2013	Dawkins, Phyllis Worthy	Harris, Jo-Anne	(610) 399-2220	jharris@cheyney.edu
University of Missouri - Kansas City	Dean, School of Nursing	6/25/2013	Cary, Ann	Hackett, Gail	(804) 828-0100	ghackett@vcu.edu
West Virginia State University	Vice President for University Relations and Operations	6/7/2013	Forsythe, Erika	Hemphill, Brian O.	(304) 766-3112	bhemphill@wvstateu.edu
University of Wyoming	President	5/31/2013	Sternberg, Robert	Bostrum, David J.	(307) 766-1121	dbostrom@tctwest.net
University of Cincinnati	Vice President for Student Affairs	5/28/2013	Merchant, Debra	Johnson, Lawrence J.	(513) 556-2322	lawrence.johnson@uc.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
University of Massachusetts Dartmouth	Provost and Vice Chancellor for Academic Affairs	5/7/2013	Karim, Mohammad A.	Grossman, Divina Gracia	(508) 999-8004	dgrossman@umassd.edu
Washington State University Vancouver	Vice Chancellor for Academic Affairs	5/7/2013	Christopher, Renny	Netzhhammer, Emile	(360) 546-9581	mel.netzhhammer@vancouver.wsu.edu
Anne Arundel Community College	Vice President for Learning	5/7/2013	Hays, Karen	Lindsay, Dawn	(410) 777-1177	dslindsay@aacc.edu
University of North Carolina at Charlotte	Dean, College of Education	5/6/2013	McIntyre, Ellen	Lorden, Joan F	(704) 687-5962	jflorden@uncc.edu
Fashion Institute of Technology	Vice President of Enrollment Management & Student Success	4/30/2013	Brigman, Leellen	Brown, Joyce	(212) 217-4000	joyce_brown@fitnyc.edu
St. John Fisher College	Dean, Ralph C. Wilson, Jr. School of Education	4/22/2013	Wischnowski, Michael	Lynd-Balta, Eileen	(585) 385-7368	elynd-balta@sjfc.edu
University of Wisconsin Milwaukee	Chief Information Officer	4/17/2013	Riedy, Joshua	Britz, Johannes	(414) 229-1122	jjbritz@gmail.com
University of Tennessee Chattanooga	Dean of Honors	4/17/2013	Frost, Linda	Tanner, Mary	(423) 425-4249	mary-tanner@utc.edu
College of Coastal Georgia	President	4/17/2013	Aloia, Greg	Huckaby, Hank M.	(404) 676-2202	chancellor@usg.edu
Purdue University Calumet	Vice Chancellor for Enrollment Management and Student Affairs	4/15/2013	Panlilio, Carmen	Keon, Thomas L.	(407) 823-2183	tkeon@bus.ucf.edu
University of Texas at El Paso	Dean, College of Science	4/8/2013	Kirken, Robert	Gonzales, Junius	(915) 747-5725	jjxg@earthlink.net
Colorado State University-Pueblo	Provost and Vice President for Academic Affairs	4/3/2013	Wright, Carl	Di Mare, Lesley Ann	(719) 549-2951	presidentsoffice@colostate-pueblo.edu
SUNY Plattsburgh	Vice President for Student Affairs	4/3/2013	Hartman, Bryan	Ettling, John	(518) 564-2010	ettlinj@plattsburgh.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
University of Texas at San Antonio	Dean, College of Business	4/2/2013	Sanders, Gerard	Frederick, John	(210) 458-4011	John.Frederick@utsa.edu
Towson University	Vice President of Administration and Finance and Chief Financial Officer	3/28/2013	Oster, Joseph	Loeschke, Maravene S.	Not available	Not available
Northeast Ohio Medical University	Executive Director of Enrollment Services	3/20/2013	Terry, Heidi	Young, Elisabeth	(330) 325-6589	eyoung1@neomed.edu
Northeast Ohio Medical University	Executive Director of Faculty Development	3/20/2013	Sriharan, Abi	Young, Elisabeth	(330) 325-6589	eyoung1@neomed.edu
University of Arkansas at Pine Bluff	Chancellor	2/26/2013	Alexander, Laurence	Bobbitt, Donald R.	(501) 686-2503	dbobbitt@uasys.edu
Southwest Minnesota State University	President	2/26/2013	Gores, Connie	Rosenstone, Steve	(651) 296-8012	chancellor@so.mnscu.edu
Northeast Ohio Medical University	Vice President for Advancement and Development	2/12/2013	Blain, Daniel S.	Gershen, Jay Alan	(330) 325-6263	president@neomed.edu
Moravian College	President	2/5/2013	Grigsby, Bryon	Chynoweth, Lyn Trodahl	(610) 861-1300	lyntrochy@aol.com
University of Virginia's College at Wise	Chancellor	1/22/2013	Henry, Donna	Sullivan, Teresa A.	(434) 924-3337	tas6n@virginia.edu
University of Maryland, College Park	Senior Vice President and Provost	1/22/2013	Rankin, Mary Ann	Loh, Wallace D.	(301) 405-5803	wdloh@umd.edu
Morgan State University	Dean of Business	1/21/2013	Boghossian, Fikru H.	Wilson, David	(443) 885-3200	david.wilson@morgan.edu
Morgan State University	Vice President for Research and Economic Development	1/3/2013	McCrary, Victor	Wilson, David	(443) 885-3200	david.wilson@morgan.edu
Fashion Institute of Technology	Director of Institutional Research and Effectiveness	12/20/2012	Glenn, Darrell E.	Prussin, Shari S.	(212) 217-4004	SHARI_PRUSSIN@exchange.fitnyc.edu
Virginia Commonwealth University	Dean, School of Engineering	12/11/2012	Boyan, Barbara D.	Warren, Beverly J.	(330) 672-2121	beverlywarren@kent.edu

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
University of Minnesota -Twin Cities	Vice President for Equity and Diversity	12/7/2012	Albert, Katrice A.	Jones, Robert James	(518) 956-8010	rjjones1951@gmail.com
University of Baltimore	Dean, Yale Gordon College of Arts and Sciences	12/4/2012	Bryan, Laura	Wood, Joseph	410-837-5244	jswood@ubalt.edu
University of California, San Diego	Vice Chancellor of Equity, Diversity and Inclusion	11/17/2012	Greene, Linda Sheryl	Fox, Marye Anne	(858) 534-5871	mafox@ucsd.edu
University of Texas Arlington	Dean of Libraries	11/15/2012	Bichel, Rebecca	Elsenbaumer, Ronald L.	(817) 272-2103	elsenbaumer@uta.edu
Upper Iowa University	Associate Vice President for Finance and Planning	11/5/2012	Rhynerson, Chris	Aungst, Donald	(563) 425-5286	aungstd@uiu.edu
Salisbury University	Vice President for External Affairs and Advancement	10/31/2012	Prince, Greg	Dudley-Eshbach, Janet	(410) 543-6012	jdudleyeshbach@salisbury.edu
Mansfield University of Pennsylvania	President	10/25/2012	Hendricks, Francis	Cavanaugh, John C.	(202) 331-8080	jccphd@yahoo.com
Montana State University	Dean of Education	10/10/2012	Ransdell, Lynda	Potvin, Martha A.	(406) 994-3600	marthapotvin@gmail.com
Weber State University	President	10/10/2012	Wight, Charles Albet (Chuck)	Martin, Cameron	(801) 321-7115	cmartin@utahsbr.edu
Montana State University	Dean, College of Letters and Sciences	10/1/2012	Rae, Nicol	Potvin, Martha A.	(406) 994-3600	marthapotvin@gmail.com
Colorado State University-Pueblo	Chief Information Officer	9/14/2012	Matola, Erich	Di Mare, Lesley Ann	(719) 549-2951	presidentsoffice@colostate-pueblo.edu
Florida International University	Associate Vice President for Enrollment Services	9/1/2012	Havens, Luisa	Wartzok, Douglas	(305) 348-2151	wartzok@fiu.edu
Montana State University	Dean of the Libraries	8/23/2012	Arlitsch, Kenning	Potvin, Martha A.	(406) 994-3600	marthapotvin@gmail.com

Positions Filled by G/A&A in Past Four Years

Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Colorado State University-Pueblo	Vice President for Finance and Administration	8/23/2012	Hanifin, Martin J.	Di Mare, Lesley Ann	(719) 549-2951	presidentsoffice@colostate-pueblo.edu
West Virginia State University	Vice President for University Advancement	8/23/2012	Schumann, Patricia	Hemphill, Brian O.	(304) 766-3112	bhemphill@wvstateu.edu
Virginia Poly Inst. & State University	Assistant Vice President, Office of University Planning	8/1/2012	Soileau, Jason	Coleman, Michael J	(540) 231-6291	colemanm@vt.edu
University of Cincinnati	Director, School of Education	7/25/2012	Stringfield, Samuel Coburn	Johnson, Lawrence J.	(513) 556-2322	lawrence.johnson@uc.edu
Bucks County Community College	President	7/25/2012	Shanblatt, Stephanie	Eisenhart, Blake H.	(215) 986-4011	beisenhart@yahoo.com
University of Illinois at Urbana-Champaign	Vice Chancellor for Research	7/10/2012	Schiffer, Peter E.	Easter, Robert	Not available	reaster@uillinois.edu
Morgan State University	Vice President for Student Affairs	6/28/2012	Banks, Kevin M.	Wilson, David	(443) 885-3200	david.wilson@morgan.edu
Virginia Commonwealth University	Vice President for Diversity and Equity	6/27/2012	Mitchell, Wanda	Warren, Beverly J.	(330) 672-2121	beverlywarren@kent.edu
Kent State University	Campus Dean for the Columbiana County Campuses	6/13/2012	Nameth, Stephen	Frank, Robert G.	(505) 277-0111	rgfrank25@gmail.com
University of Wisconsin Milwaukee	Dean, College of Engineering and Applied Sciences	6/13/2012	Peters, Brett A.	Britz, Johannes	(414) 229-1122	jjbritz@gmail.com
State of Oregon	Chief Education Officer	5/31/2012	Crew, Rudolph F.	Kitzhaber, John	(503) 378-4582	Not public
Upper Iowa University	Vice President for International Programs	5/30/2012	Betancourt, Ismael	Walker, Alan G.	(740) 351-3641	alan_walker42@hotmail.com

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Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
University of Maryland, Baltimore	Chief Development Officer and Vice President	5/16/2012	Dowdy, Mickey	Perman, Jay	(401) 706-7002	jperman@umaryland.edu
West Virginia State University	President	5/9/2012	Hemphill, Brian O.	Noland, Brian	(423) 439-4211	president@etsu.edu
University of Baltimore	Dean, School of Law	5/3/2012	Weich, Ronald	Wood, Joseph	410-837-5244	jswood@ubalt.edu
University of Massachusetts Dartmouth	Chancellor	5/1/2012	Grossman, Divina Gracia	Caret, Robert Laurent	(508) 999-8005	dgrossman@umassd.edu
University of Nevada, Las Vegas	Executive Vice President and Provost	5/1/2012	White, John V.	Smatresk, Neal	(940) 565-2000	smatresk@gmail.com
Louisiana State University	Vice Chancellor and Provost	4/25/2012	Bell, Stuart R.	Martin, Michael V.	Not available	Not available
Purdue University Calumet	Dean, School of Management	4/24/2012	Mutchler, Jane	Rogers, Ralph	(219) 989-2993	simralph@att.net
Montana State University	Dean of Arts and Architecture	4/17/2012	Cornwell, Nancy C.	Potvin, Martha A.	(406) 994-3600	marthapotvin@gmail.com
University of Texas at Brownsville	Dean, College of Biomedical Sciences and Health Profess	4/17/2012	Colom, Luis	Artibise, Alan	Not available	Not available
Baylor University	Dean, College of Engineering	4/17/2012	O'Neal, Dennis	Davis, Elizabeth	(254) 710-3601	elizabeth_davis@baylor.edu
College of Saint Mary	Vice President for Enrollment Services and Marketing	4/17/2012	Fritz, Greg	Stevens RSM, Maryanne	(402) 399-2435	mstevens@csm.edu
Illinois State University	Dean, College of Education	4/16/2012	Schoon, Perry	Everts, Sheri N.	(828) 262-2040	evertssn@appstate.edu
Washington State University Vancouver	Chancellor	4/5/2012	Netzhammer, Emile	Floyd, Elson S.	Deceased	Deceased
University of Wisconsin Milwaukee	Provost and Vice Chancellor for Academic Affairs	4/5/2012	Britz, Johannes	Lovell, Michael R.	(414) 288-7223	michael.lovell@marquette.edu

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Institution	Position	Date Closed	Placed	Institutional Representative	Rep Phone	Rep Email
Anne Arundel Community College	President	3/30/2012	Lindsay, Dawn	Fretwell, Victoria	(410) 424-4665	vfretwell@jhhc.com
Montana State University	Dean, College of Business	3/9/2012	Aytes, Kregg	Marley, Robert	(573) 341-4114	provost@mst.edu
University of Maryland Eastern Shore	President	3/9/2012	Bell, Juliette B.	Kirwan, William E.	(301) 445-1901	bkirwan@usmd.edu
University of Missouri - Kansas City	Dean, College of Arts and Sciences	3/1/2012	Vaught, Wayne	Hackett, Gail	(804) 828-0100	ghackett@vcu.edu
University of Arizona	President	3/1/2012	Hart, Ann Weaver	Duval, Fred	Not public	Not public
Baylor University	Associate Vice President for Major Gifts	2/3/2012	Voyles, Paula	Haag, Jerry	(254) 710-1011	Not available
Suffolk University	President	2/1/2012	McCarthy, James	Duggan, Jr., Dennis M.	(781) 535-6066	dduggan@awhs.org
Augustana College	Senior Vice President for Academic Affairs and Dean of C	1/27/2012	Hasseler, Susan	Oliver, Robert	(605) 274-4111	rob.oliver@augie.edu
Missouri University of Science & Technology	Chancellor	1/19/2012	Schrader, Cheryl	Gragg, Larry	(573) 341-4804	lgragg@mst.edu
New Mexico State University	Senior Vice President for Administration and Finance	1/12/2012	Throneberry, Angela	Couture, Barbara	Not public	bacouture@aol.com
Montana University System Office	Commissioner of Higher Education	1/5/2012	Christian, Clayton	Christian, Clayton	(406) 444-6570	clayton@stewartmt.com
Kent State University	Dean, Undergraduate Studies	1/2/2012	Sewell, Said	Frank, Robert G.	(505) 277-0111	rgfrank25@gmail.com

TAB 5: SEARCH PROCESS

As preamble to answering the subsections of Tab 5, let us provide an overview of our philosophy and values of search and our methodology and approach.

Philosophy and Values of Search

Our process for successful searches and placement of high-level executives derives from our philosophy that you, our client, are of utmost importance to us. We listen, we learn and we communicate in a forthright, honest and timely manner. Our responsibility is to bring you highly qualified candidates who match your expectations. We value your knowledge and your openness as together we prepare our recruiting strategies and consider the candidates.

We view our client relations as long term, rather than transactional, assignments. Often we place a chancellor/president of an organization and later are retained to search for members of the senior level administrative team and then to provide organizational and leadership development support for transitioning of senior members of the team, facilitate retreats for the president's team and address other organizational and leadership development issues. Often, too, we facilitate a hire and then many years later when the position opens again we are retained for a repeat search. We work in partnership with you, our client, and your unique needs and challenges. We customize each search to situate our work within the culture of the institution, consistent with organizational values and historical processes. We are a nimble firm, flexible in meeting client expectations and producing quality candidates who meet or exceed expectations.

Further, we have an equally important responsibility to candidates, prospects and sources on your behalf. We will communicate necessary and timely information to them and act with dignity and fairness at each step in the process.

Unique Attributes that Distinguish Us as a Leading Higher Education Search Firm

- Decades of extensive experience with executive searches in public and private universities;
- Proven track record of 97% repeat business from clients;
- Appointment of a woman or person of color in over 55% of our searches (we believe this to be the best of all higher education search firms) (see section below);
- Searches that close with the client getting the candidate of first choice;
- Partnership model to work with you and to listen to all stakeholders so that the search is a collaborative process;
- Personalized attention from the G/A&A Partner or Principal who leads your search;
- Commitment to not accepting searches that could be viewed as competing with each other at the same time and for not recruiting our own placements;
- Methods and process that are efficient and effective, derived from research-based solutions and best practices of the executive search industry;
- Our tools customized to each client and not used by other firms (e.g. grids, questionnaires); we bring additional information to the committee to assess the candidates;
- Process that allows the search committee to reach agreement efficiently;
- Ability to reach prime candidates for this opportunity through our extensive database, networks and strategic outreach process;
- Cost effectiveness in fees, including measures to reduce expenses and increase effectiveness (e.g., video conferencing and technology support) and performing most administrative functions at our end;

- Ability to perform your requirements in four or five meetings;
- Reputation for accessibility to our clients at all times (e.g., we endeavor to respond to all emails and phone messages from the search committee Chair and administration liaison within 24 hours, weekly updates to Search Chair, regular schedule of phone check-in calls); and
- Commitment to excellence in every engagement and to the highest level of professional conduct.

We are constantly reengineering and improving our processes. We try to learn from our clients at each step along the way. We use feedback forms at each of our client meetings.

We believe that understanding client expectations is a major factor in success. This defines how we advertise the institution and position and how we reach out into the market. Our goal is to seek candidates who most completely meet the qualifications as determined by you.

Our process is designed to be efficient and effective in helping you arrive at your candidate of choice. We begin our outreach by segmenting the market to recruit a diverse prospect pool for consideration, which will include utilizing our databases and contacting reliable sources and organizations for recommendations. G/A&A has developed an effective strategy to identify and obtain qualified candidates, including minorities and women. Based on our experience with international and national searches, we have developed a large network of sources and contacts in the field who will provide nominations of highly qualified candidates. Our database is extensive.

a. Firm's Search Process

Describe the firm's search process, including the level and type of participation by the principals/partners. Indicate how you would propose to conduct an effective, timely national search for senior and mid-level administrators and academics at the University. Indicate how your firm would propose to conduct an effective, timely national search for the specialty positions noted. Include a model timeline. Lastly, discuss your methodology in searching for 'hard-to-fill' senior and mid-level positions.

We provide a branded process that is the same in process and spirit for every administrative and academic search for all types or levels, including specialty positions and stature hires. Our branded process assures that each search follows the same procedures no matter which partner or principal heads the project and which consultant and administrative assistant/researcher participates as part of the team. Work plan, including a model timeline, is provided under [g. Timeline](#).

All G/A&A searches are supervised by Partners Greenwood and Asher who have final authority over decisions made on behalf of the firm. Each project is managed by either a partner or principal.

Our process for searching for "hard-to-fill" senior and mid-level positions employs our same branded procedures. This process enables us to dig deeply and search broadly for hard-to-fill positions. As examples of quality results of our searches, we are proud to have recently provided to our clients placements that included four National Academy members (one at an AAU institution and three at non-AAU institutions). Included in these four National Academy placements were a renowned medical doctor and a female dean of engineering. It is very difficult to recruit National Academy Members for universities that are not AAU. We are proud of our repeat client rate of approximately 97% since 1992. Even in the difficult national recruitment climate, which higher education is experiencing due to matters relating to the economy and retirement of senior leaders, the majority of our searches are continuing to close on schedule with our clients getting the candidate of their choice.

Our approach and methodology goes beyond the detailed description of scope of work provided in the RFP. We customize our approach and methodology to meet the specific needs of our client. We are a

nimble firm and can be responsive to client needs at all times. We interpret our role as facilitators of the search process that is preferred by the search committee and supporters of the search process within the context of the culture of the host institution. This section provides a detailed project plan and timeline based on the requirements and our experience in conducting successful searches.

Phase I: Development of Timeline and Criteria

- Meet with the client to gather information and intelligence to customize executive search services. This would include meeting with the Hiring Authority and the search committee to provide advice regarding search strategies and “best practices” that might enhance the effectiveness and success of a search in today’s higher education climate.
- Advise the Hiring Authority regarding outreach and involvement of relevant constituent groups to build consensus regarding top characteristics required and desired in the new hire. We would conduct a consensus-building exercise with the client, stakeholders, staff members and/or search committee to elicit information and build agreement around emerging conclusions. Clients have found these meetings particularly helpful as they establish a rapport, enhance the communication between stakeholders, and provide the community with a clear understanding of the organization’s mandates.
- Solicit input from stakeholders about the desired characteristics and expectations of the ideal candidate, as well as gather nominations from entities and individuals related to your institution such as leaders and board members of other institutions in the state, of other institutions of the same type, of peer and aspirational institutions, of institutions in associations and other affinity organizations). We will also reach out to heads of relevant medical and administrative associations, diversity organizations, and state networks and systems.
- Through these meetings and inquiries, develop with the Hiring Authority and Search Committee a set of criteria for the search process and for candidate qualifications including job expectations for the new hire. From this work would emerge the position description, including the required and desired characteristics of the next hire. Per the preference of the Hiring Authority, we will work with the Hiring Authority to draft a position description or submit a draft for consideration and amendment by the Hiring Authority.
- Assess competitive strengths/weaknesses of client in national market for searches, evaluate current search processes, and assess client opportunities/challenges. Share this assessment with the Hiring Authority and Search Committee as preparation for the design of the targeted strategy for recruitment.
- Work with the Hiring Authority and Search Committee to devise a targeted strategy for recruitment. The concept behind a targeted search strategy is to determine a set of concentric circles that encapsulate the most desired characteristics of the next hire, with each new circle representing a degree of wider variation that expands the search scope. For example, in a presidential search, the core circle may include sitting presidents of similar or aspirational institutions. A second circle may include sitting provosts/vice presidents of academic affairs. A third circle may include rising stars in leadership roles in academia. A fourth circle might include substantive leaders with academic roots within government agencies, foundations, non-profits, and industry. The goal is to design the set of concentric circles to include all of the possible combinations of backgrounds and expertise that could be applicable to this institution. The strategy will then be followed by G/A&A for its recruitment plan (e.g., emails and follow-up phone calls to everyone on the strategic target list identified by the application of the strategy). We provide updates on the progress of application of this strategy to the search chair in a weekly

update email. See [section below](#) for our particular efforts within our commitment to the recruitment of a diverse applicant pool.

- Collaborate with the client to develop a search plan of action, timeline, recruitment materials, interview designs and selection process, which will present the strengths, challenges and opportunities of each candidate so you can secure candidates who best match your criteria.
- Comment on, draft, or collaborate with the client regarding creation, review or updates to the position profile for any executive level positions.
- If needed, assist in determining how to advertise the position and with the placement of advertisements in international, national, and local papers and publications such as *The Chronicle of Higher Education*, *DIVERSE* (formerly *Black Issues in Higher Education*), *Hispanic Outlook in Higher Education*, *Women in Higher Education*, *The Chronicle of Philanthropy*, and local newspapers. We will work with the search committee to identify the specific media outlets related to the medical field of the position and organize media placements. We will provide assistance in determining the best mix of ad placements to address the criteria identified for the search within the budgetary requirements of the search.
- We will work with the search committee chair and committee members to address the ethical issues in a search process. Dr. Jan Greenwood, founder and partner of G/A&A, worked with the American Council on Education at its request to develop a search firm code of ethics, and G/A&A has adhered to this code ever since. We provide training on these search ethics issues or can supplement training from the client's HR office. Ethics are very grave issues in the search process and we take these issues very seriously.

Phase II: Identification of Qualified and Highly Desirable Candidates

- Actively recruit individuals who have a high probability of success in meeting the requirements specified in the position profiles for this position. We will tap our own extensive database of professionals; reach out into our national and international networks; and solicit and follow-up on nominations received from you and from our own contacts. In particular, we will reach out to appropriate officers and long-serving leaders of similar institutions, in both the public and private spheres to find people with expertise in similar entities to those of the institution which is our search partner. At the same time, we will always be looking for candidates from outside this group of institutions, and even from outside medical organizations, who may have deep leadership experience in areas of the unique characteristics and strengths of your institution. We will recruit a diverse prospect pool for consideration.
- Coordinate with the client's online application portal or have nominations and applications come directly to G/A&A, per the preferred process and culture of your institution. If desired, we provide all of the acknowledgement letters for application completion and all other follow-up and communications as needed with the candidates for the duration of the search.
- Screen applicants and nominees and provide supporting documentation of recruitment efforts, including overall market feedback and gender/diversity statistics. Track and manage prospect and candidate information throughout the search process and provide detailed background information on the candidates. This includes reviewing application materials for each prospect (e.g. cover letter, CV/resume, checking for information on the candidate through Google and Factiva newspaper headlines).

- Assist the Search Committee with the evaluation of candidates so that strengths and weaknesses are readily discernible. We compare candidates within a customized matrix report (via resume, additional information, and preliminary interviews) with stated characteristics and qualities listed in the position profiles for the top candidates showing the most promising qualifications.
- Meet with the search committee to present a complete list of all applicants, including those coming from advertisements, nominations and recruiting. We will screen candidates regarding the stated qualifications for the position and note to the Committee those candidates who do not meet minimum requirements. At the search committee's meeting to review prospects, we will provide detailed summaries on each candidate based on our analysis of application materials and interviews with the prospects by the G/A&A team leaders. Conduct phone and/or video screening interviews with candidates advanced by the search committee to Round One Interviews.
- Present G/A&A rating instruments for candidates and work with search committee to develop its own rating instruments for candidates appropriate to search criteria. We also provide additional information beyond application cover letters and CVs/resumes. Examples include a custom-designed questionnaire relating to the specific criteria, issues, and challenges of the search that we ask candidates to complete so that the Search Committee can have comparable information across candidates. We do in-depth investigation for how candidates appear in Google headlines, scholarly indexes, and newspaper/media stories (using Factiva, a service similar to Lexus/Nexus).
- Share applicant materials with search committee members through a secure website maintained by G/A&A expressly for this purpose. We provide training for search committee members regarding access and use at the Start-Up Meeting. As the search progresses, we add more information regarding the search and candidates advanced forward that are useful to the search committee in their decision-making. We provide all materials electronically unless the client provides specific requests for paper materials. After a search is completed, we will work with the client to provide an electronic documentation of search materials for archiving, per direction of the client as to specific needs.
- Organize Round One interviews, including scheduling of candidates and facilitation of their travel arrangements. We work with the client to identify a site (or Skype/video conferencing) solution for the Round One interviews and provide specifications for logistical needs for an interview site so that we can work with the client for the contracting and logistical use of such a site.
- Support the client in the development of a template schedule for the campus interviews that will include meetings with all of the relevant campus officials and groups, as well as an open forum and other ways that the client wants to include broad involvement in the campus visit interview process.
- Work with the institution to create a candidate package for Round One Interviews and/or Campus Visits that showcase the institution, the city and region, the school resources of the community, and the state's educational structure. While candidate packages used to be a large mailing of brochures and reports, such information can now be captured as a single page of Internet links to appropriate and useful websites. We work with the institution to create this listing.
- We facilitate 360° referencing, which includes outreach to supervisors, colleagues, and direct reports both on the offered list of the candidate and off the list of the candidate. We work with the search committee to develop a referencing protocol template of desired questions for gathering of information. We either conduct the references calls ourselves or in conjunction with search committee members, per the choice of the search committee. We use behavioral assessment

strategies; that is, we seek to uncover the process, accomplishments and roles for each referenced candidate. We want to know what candidates actually did, behind the general statements that referees so often provide. We provide a presentation of highlights of the findings of the referencing at the Reference Feedback Meeting for the search committee members, and a full report to the Hiring Authority.

- Provide technical, administrative and logistical support for the search and interview process, site visits, final selection, contract negotiations, transition considerations and follow-up. Provide training for search committee members regarding interview procedures.
- As requested, organize background checks on finalist candidates, including criminal background checks, motor vehicle records, verification of education, personal financial background checks professional designation, and credentials provided in the application package.
- Facilitate the scheduling and organization of visits by representatives of the search committee to make visits to the employment site(s) of the leading candidates in this search to meet with the supervisors and colleagues of candidates. While such employment site visits are still rare in the higher education search process, an increasing number of search committees find such visits helpful and instructive to their decision process. We will support any such events like this that fit within the culture of the hiring institution.
- Be available throughout the search process for timely consultation and debrief with the search committee and chair by phone, e-mail or in person regarding the applicant pool, referencing, and consideration process. We endeavor to respond to all inquiries from the search committee chair and administrative liaison as well as by the Hiring Authority within 24 hours.

Phase III: Selection and Announcement

- Conduct or assist in conducting background checks and 360° reference checks on selected candidates.
- Collect information from candidates regarding their contract expectations. Discuss contract needs with finalists. Provide this information to the Hiring Authority, along with any other information or analysis requested by the Hiring Authority in support of the hiring decision.
- As requested, provide input on the final selection process.
- Provide insight into the design of the announcement document and process to support the client in the announcement of its new hire.
- If requested, provide transition support for your institution and its new hire through a contract extension regarding an onboarding process. See [Appendix C](#).
- Notify all candidates, nominators and others associated with the search about its outcome via an email that includes linkage to the institutional announcement of the new hire.

G/A&A Support throughout All Phases of the Search

- We understand the importance of having the right person to fill a position. Our consultants have a history of 97% repeat business, searches that close with the client getting the candidate of first

choice, and a process that allows the search committee (or other representative group) to reach agreement. Most of our client relationships are long-term.

- The G/A&A team will collaborate with the client throughout any searches, from the initial meetings through the recruitment, evaluation and selection of successful candidates. We understand the unique challenges of search and are prepared to leverage our expertise throughout the process to meet the agreed-upon objectives. Based on our experience with international and national searches, we have developed a large network of sources and contacts that will provide nominations.
- We will provide master lists of candidates, weekly search updates, market feedback reports, a candidate matrix report on prospects and candidates at each stage of the search, reference reports, and other presentations as needed. Copies of all applications and nominations as well as all acknowledgements sent to applicants regarding receipt of application materials will be shared with the chair of the search committee as requested.
- We use technology to facilitate searches in cost-effective ways. We conduct many search meetings with clients via video conferencing. Further, many clients use video conferencing as a vehicle for Round One Interviews. This can be a significant cost savings to our clients. We also have the capability to relay information, including candidate files, electronically through a shared-access website, which allows committee members to access them easily and quickly.
- The G/A&A team leaders will coordinate with the client on communication strategies and will be able to provide advice on cost-effective ways to conduct a high quality search.
- We utilize a specialized feedback tool that measures client satisfaction and allows the client to evaluate our work in all areas of the search on a four-point scale where 1 is the lowest and 4 is the highest. Our average rating is 3.90.
- G/A&A will maintain complete records of the search activities as required under the contract, and share these records with the client as requested.

The following table summarizes milestones and deliverables at each step of the G/A&A search process.

Summary of Milestones and Deliverables			
Phases	Milestones	Related Activities	Deliverables
Phase I: Development of Timeline and Criteria	Initiation of searches and establishment of expectations	Initial meetings with client	Agreement on institutional needs regarding search.
	Organizational needs analysis	Forums, interviews and/or phone calls conducted with stakeholders as needed	Assessment of competitive strengths/weaknesses of client in national market for searches, evaluate current search processes, assessment of client opportunities/challenges.
			Agreement on position profiles, process, format, work

Summary of Milestones and Deliverables

Phases	Milestones	Related Activities	Deliverables
			plans, schedules, and budget for the searches
Phase II: Identification of Qualified and Highly Desirable Candidates	Research and candidate development	Research and targeted outreach to candidates	Establishment of targeted search strategies to yield pools of viable and desirable candidates
	Search Committee Start-Up Meeting	Educate committee members on search procedures, strategies, development of search materials (e.g. interview questions, referencing protocol), use of secure website	Start-Up Meeting, support and education materials for search. Introduce committee members to secure web site entry, usage and policies.
	Candidate evaluation: Determination of candidates to interview	Meetings to review prospects (long list)	Resumes and updates on other information gathered on candidates Market feedback report delivered
	Candidates selected for first set of interviews	Logistics surrounding interviews and schedules	Advance agreement on list of interview questions and interview process
	Semi-finalists candidates selected: Review of background information on the candidates	Coordination of reference checks as requested by client Coordination of background checks as requested by client	Client selects final candidates
	Candidate selection: Final round of interviews	Logistics surrounding interview schedule Discussion of communication strategies Intervention regarding any candidate issues	Agreement on pools of acceptable finalists
Phase III: Selection & Announcement	Background checking	Conduct 360° referencing and background checking on finalists. Work with search committee to design referencing protocol, and if members wish to conduct references, teach referencing strategies and techniques.	Final candidates selected
	Contract negotiation	Collect and discuss appointment needs with finalists. Provide input to Hiring Authority regarding contract negotiations	Conduct contract negotiation with lead candidate for selection

Summary of Milestones and Deliverables			
Phases	Milestones	Related Activities	Deliverables
	Announcement	Provide input on final selection and announcement process	Work with client to develop announcement of new hire
	Notification of members of candidate pool	Notify all candidates, nominators and others associated with the search about its outcome.	Notification of interested parties regarding outcome of search

b. Assistance during the Interview Process

State firm's capabilities in providing assistance during the interview process. Examples of assistance to include but not be limited to: assistance with correspondence between applicants, nominators and nominees, and coordinate interviews of internal and external prospects and the University. Provide a University dedicated website with password protection so that resumes are available to search committees at all times.

- We take care of all correspondence for applicants, nominators and nominees. This includes initial outreach and follow-up about inquiries, the nomination process, announcement of nomination to nominees, confirmation of application materials, and updates about the unfolding of the search process. For the Round One and Campus Visit Interview phases, we take care of all correspondence that announces selection by the search committee to advance to the next stage of the process as well as notifying candidates not selected of their status. For those advancing to the interview process, we provide detailed correspondence about interview logistics and process and follow-up about the interviews. We also announce to candidates selected by the search committee to advance to the next stage of the process about their next level of involvement in the search and notify those not going forward of their status.
- We coordinate all aspects of the Round One Interviews as directed by the chair of the search committee. This can include notifying all advancing candidates about their status and providing logistics and process information. We consult with candidates about their availability for interview slots and from this information organize an interview schedule for the search committee. We facilitate travel arrangements and reimbursements for candidates. We work with the search committee administrator to identify a site (or video conferencing solution) and accordingly organize logistics for the Round One Interviews. If directed by the search committee chair we will also organize the interview location, food, and technical aspects of the event.
- We work with the institution to create a candidate package for Round One Interviews and/or Campus Visits that showcase the institution, the city and region, the school resources of the community, and the state's educational structure. While candidate packages used to be a large mailing of brochures and reports, such information can now be captured as a single page of Internet links to appropriate and useful websites. We work with the institution to create this listing.
- We meet with each candidate selected for Round One Interviews by Skype to conduct a pre-interview for additional depth of screening.
- We facilitate as many aspects of the Campus Visit Interviews as desired by the search committee. This typically includes notifying candidates of their invitation from the search committee to visit the campus, facilitating travel arrangements and visit logistics, correspondence regarding preparation

and follow-up for the visit and interviewing the candidates after their visits to ascertain how they felt the visit went. We provide samples of Campus Visit schedules from similar searches. We support and facilitate in any ways requested by the search committee.

- We provide a secure website to search committee members for the sharing of candidate materials. G/A&A maintains this site which is available 24/7 for access by committee members to search documents. We provide training for search committee members regarding access and use at the Start-Up Meeting. As the search progresses, we add more information regarding the search and candidates advanced forward that are useful to the search committee in their decision-making. We provide all materials electronically unless the client provides specific requests for paper materials. After a search is completed, we will work with the client to provide an electronic documentation of search materials for archiving, per direction of the client as to specific needs.

c. Background Checking

Describe in detail the process by which your company verifies all education degrees of candidates. Provide detail on coordination of obtaining credit/financial background check and litigation background check.

- ✓ As requested, we organize background checks on finalist candidates. We provide verification of education degrees and professional credits provided in the application, credit and personal financial status, motor vehicle records, court and litigation records.
- ✓ For the candidate selected for hiring we recommend a criminal background check and will facilitate this process.
- ✓ We provide the reports from these background-checking efforts to the Hiring Authority in a notebook of documentation on the final candidates.

d. Reference Checking

Describe how firm handles candidate reference checks.

- ✓ We facilitate 360° referencing, which includes outreach to supervisors, colleagues, and direct reports both on the offered list of the candidate and off the list of the candidate.
- ✓ We work with the search committee to develop a referencing protocol template of desired questions for gathering of information.
- ✓ We either conduct the references calls ourselves or in conjunction with search committee members, per the choice of the search committee.
- ✓ We use behavioral assessment strategies; that is, we seek to uncover the process, accomplishments and roles for each referenced candidate. We want to know what candidates actually did, behind the general statements that referees so often provide.
- ✓ We provide a presentation of highlights of the findings of the referencing at the Reference Feedback Meeting for the search committee members, and a full report to the Hiring Authority.

e. Screening Methodology

State the firm's internal screening methodology that produces the most viable candidates (video conference/in person/telephone, etc.). Provide examples of external screening tools in providing possible past controversies with which a candidate has been associated.

- ✓ In the recruiting phase of the search process we screen applicants and nominees through detailed review of candidate materials, phone conversations, and scrutiny of application documents. We track and manage prospect and candidate information throughout the search process and provide detailed background information on the candidates. This includes reviewing application materials for each prospect (e.g. cover letter, CV/resume).
- ✓ We document our recruiting efforts, including overall market feedback and gender/diversity statistics and provide in a report to the search committee and Hiring Authority.
- ✓ Assist the Search Committee with the evaluation of candidates so that strengths and weaknesses are readily discernible. We compare candidates within a customized matrix report (via resume, additional information, and preliminary interviews) with stated characteristics and qualities listed in the position profiles for the top candidates showing the most promising qualifications.
- ✓ We provide custom-designed G/A&A-created rating instruments for candidates and work with search committee to develop its own rating instruments for candidates appropriate to search criteria.
- ✓ We provide additional information beyond application cover letters and CVs/resumes. Examples include a custom-designed questionnaire relating to the specific criteria, issues, and challenges of the search that we ask candidates to complete so that the Search Committee can have comparable information across candidates. This questionnaire provides mechanisms for capturing information about past controversies, job dismissals and agreements about non-disclosure of work experiences.
- ✓ We do in-depth investigation for how candidates appear in Google headlines, scholarly indexes, and newspaper/media stories (using Factiva, a service similar to Lexus/Nexus). In particular, we scrutinize the web and newspaper headlines for information about past controversies, issues, and problems associated with the candidate and seek to collect context and documentation about these issues.
- ✓ As part of our processes of recruitment and especially in preparation for the Prospect Review Meeting and Round One Interviews, we meet with candidates by Skype for in-depth screening and assessment.

f. Salary Comparisons

Provide to the University a salary comparison of the position among peer institutions early in the process.

- ✓ If requested, we will conduct a salary comparison on the position by tapping CUPA-HR data and position salary and requisite information from professional associations related to the position, and/or collecting data from peer and aspirational institutions for comparable positions. We can also draw data from our own confidential database of salary information for hires in previous, similar searches. If the client requests this assistance, we typically conduct a salary comparison

process as the client is developing the position description to inform the search committee process in shaping the requirements and qualifications of the position.

- ✓ From the final candidates we collect information regarding their salaries in their current positions and their salary requests for the new position. Our custom-designed candidate negotiation form also provides a way to collect other requirements and requests from candidates before the actual negotiation process with the Hiring Authority begins.

g. Timeline and Work Plan

Develop and provide the University a timeline for each candidate from search initiation and establishment of expectations through candidate selection, negotiation, and search completion. The timeline should include milestones, activities and deliverables along the interviewing process.

G/A&A can commence a search immediately upon execution of the contract for the position. We can also execute a contract for commencement of a search in the future; for example, execute a contract in the summer for a search that will commence in the beginning of the fall term when faculty return to campus and can participate in search committees.

Our typical schedule or timeline for a search spans four months of activity. This timeline is subject to the calendar of your institution and the availability of candidates. The timeline can be modified to meet the needs of the client and the realities of the academic calendar of the institution. See below for a proposed timeline for this search.

Month 1	Search initiation and establishment of expectations
	↓
Month 2	Research, candidate development and candidate evaluation
	↓
Month 3	Candidate selection, negotiation and search completion

PHASE I/MONTH I DELIVERABLES (DEVELOPMENT OF TIMELINE AND CRITERIA)

- Establish partnership and clarify expectations
- Conduct orientation to the search process
- Discuss application of best practices and search experience
- Establish schedule for the search
- Review client materials
- Discuss how the client wants the process to evolve, including involvement of other departments, such as Human Resources
- Gain consensus on the characteristics and skills desired in the candidate (e.g. based on the culture of the organization)
- Work with the client to design an evaluation checklist (required vs. desired characteristics)
- Meet with constituencies, as needed
- Revise profile with input from appropriate constituencies
- Clarify administrative tasks for the search (e.g. roles and responsibilities for each step of the process)
- Provide assistance with web site, as needed
- Design a communication plan, including a strategy for appropriately informing constituencies of the search process
- Develop advertisement(s) and determine placement
- Exchange information relevant to the search (e.g. important phone numbers)

- Meet with the search committee to finalize timeline, criteria and process. Discuss ethics and confidentiality. Work with client's HR office regarding training of search committee members for the search process.

PHASE II/MONTH II DELIVERABLES (IDENTIFICATION OF QUALIFIED AND HIGHLY DESIRABLE CANDIDATES)

- Develop strategies for the search to encompass a diverse pool of candidates
- Complete original research
- Contact sources, nominees and prospects
- Send information to prospects
- Develop communication systems to sources, prospects, and candidates (e.g. thank you letters)
- Pre-qualify candidates
- Obtain resumes and additional materials
- Assess candidates' skills and experience against the profile
- Present market feedback report
- Prepare master list of active candidates
- Present and discuss candidates with the client
- Committee determines the client's top candidates to be invited to interview
- Sign off candidates not going forward
- Schedule interviews
- Prepare for and conduct interviews
- Committee determines semi-finalists from the first round of interviews
- Complete preliminary background checks
- Provide feedback on background checks
- Committee selects finalists

PHASE III/MONTH III (SELECTION AND ANNOUNCEMENT)

- Coordination of background checks and final 360° referencing checks
- Produce notebook of materials for each finalist candidate to Hiring Authority
- Review candidate compensation and other considerations with the client
- Support client for conduct of final round of interviews
- Gain consensus on final candidate and the offer to be made
- Assist in negotiating final contract
- Confirm candidate acceptance
- Work with client to develop announcement of new hire
- Notify all candidates, nominators and others associated with search about outcome
- Complete additional communications with client

Sample Search Schedule	
Timeline	Activity
Date: January 1, 2016	Assume execution of contract to commence search process. G/A&A can begin earlier in 2015 if desired by client.
Date: January 4, 2016 (Monday)	Launch phone call with Search Chair to organize process Draft search documents (institutional profile, position description, ad, ad plan). Attend early January Board Retreat on presidential search process.
Date: January 21, 2016 (Thursday) <ul style="list-style-type: none"> Meeting Time: 8:00 am – 10:00 am Forum Time: 10:00 a.m. – 5 p.m. 	Orientation & Start-Up Meeting: G/A&A meets with Search Committee; search process outlined and candidate profile and expectations reviewed and finalized. Any forums or meetings with constituencies deemed desirable by the institution.
	Place Advertisements Nominations Sought Recruiting Conversations Held
Date: March 2, 2016 (Wednesday) <ul style="list-style-type: none"> Time: 8:00 am – 12:00 pm (or later) 	Prospect Review Meeting: G/A&A presents the Search Committee with a list of prospects for consideration. The committee selects candidates for preliminary review and discuss interview strategies (approximately one/two weeks prior to this meeting, each committee member reviews candidate files prior to meeting)
Date: March 14-15, 2016 (Monday-Tuesday)	Round-One of Interviews: Committee and G/A&A will conduct interviews of leading candidates and select candidates for referencing; Discuss referencing strategies
Date: March 21, 2016 (Thursday) <ul style="list-style-type: none"> Time: 11:00 am – 2:00 pm 	Reference Feedback Meeting BY PHONE OR VIDEO PERHAPS
Date: Week of April 4, 2016 We may still need to flex here	Round Two of Interviews (Search Committee members may be actively involved in campus interviews, collecting, and compiling campus feedback)
Date: Day after visit of last candidate <ul style="list-style-type: none"> Time: 8:00 am - 11:00 am 	G/A&A and Search Committee Discussion and Recommendation BY PHONE OR VIDEO PERHAPS
Date: By mid-April, 2016	Make offer, negotiate contract
Date: _____, 2016	Appointment
Date: _____, 2016	Start Date (goal of July 1, 2016)

h. Successful Recruiting Conclusions

Provide a full list of successful recruiting conclusions and resulting positions by title and institution of higher education or healthcare including any successful positions among the specialty fields noted.

See tables below for successful recruiting conclusions and resulting positions in three areas (president, substantive academic positions and substantive administration positions) over the past five years.

Examples of Presidential Searches Completed By G/A&A in Past Five Years

Institution	Position Filled	Search Closure
Albany College of Pharmacy and Health Sciences	President	12/2013
American College of Education	President	2/2011
Anne Arundel Community College	President	3/2012
Association of College Unions International (ACUI)	Chief Executive Officer / Executive Director	12/2014
Austin Peay State University	President	6/2014
Bucks County Community College	President	7/2012
Butler University	President	4/2011
Central State University	President	5/2012
Chattanooga State Community College	President	5/2015
Chicago State University	President	10/2015
College of Coastal Georgia	President	3/2013
Dallas County Community College District	Chancellor	10/2013
East Tennessee State University	President	11/2011
Edinboro University of Pennsylvania	President	12/2011
El Centro College	President	8/2014
Florida Agricultural and Mechanical University	President	1/2014
George Mason University	President	12/2011
James Madison University	President	11/2011
Kendall College of Art and Design	President	3/2015
Kutztown University	President	3/2015
Lehigh Carbon Community College	President	5/2014
LeMoyne Owen College	President	6/2015
Lock Haven University of Pennsylvania	President	3/2011
Louisiana Board of Regents	Commissioner	2/2011
LYRASIS	Chief Executive Officer	5/2015
Mansfield University of Pennsylvania	President	10/2012
Minnesota State University Moorhead	President	4/2014
Missouri University of Science & Technology	Chancellor	1/2012
Montana Tech of the University of Montana	Chancellor	5/2011
Montana University System	Commissioner	1/2012
Moravian College	President	12/2012
Mountain View College	President	2/2015
New School of Architecture and Design	President	12/2013
North Lake College	President	8/2014
Northeast Higher Education District	President	3/2015
Northland Community and Technical College	President	3/2015
Oregon Education Investment Board	Chief Education Officer	5/2012
Pennsylvania State System of Higher Education (PASSHE)	Chancellor	8/2013
Southwest Minnesota State University	President	2/2013

Examples of Presidential Searches Completed By G/A&A in Past Five Years

Institution	Position Filled	Search Closure
Southwest Tennessee Community College	President	5/2015
Suffolk University	President	1/2012
Tennessee State University	President	11/2012
Tennessee Tech University	President	5/2012
Texas Tech University Health Sciences Center at El Paso	Founding President	4/2014
University of Arizona	President	2/2012
University of Arkansas at Pine Bluff	Chancellor	3/2013
University of Arkansas, Fayetteville	Chancellor	10/2015
University of Florida	President	10/2014
University of Kentucky	President	5/2011
University of Maryland Eastern Shore	President	3/2012
University of Massachusetts	President	1/2011
University of Massachusetts Dartmouth	Chancellor	4/2012
University of Memphis	President	5/2014
University of Missouri System	President	12/2011
University of North Georgia (Formerly North Georgia College & State University)	President	5/2011
University of Pikeville	President	10/2015
University of Virginia's College at Wise	Chancellor	12/2012
Washington State University Vancouver	Chancellor	3/2012
Weber State University	President	10/2012
West Virginia State University	President	5/2012

Examples of Searches for Substantive Academic Units Completed by G/A&A in Past Five Years

Institution	Position	Search Closure
Albany College of Pharmacy & Health Science	Provost	3/16/2015
Baylor University	Dean, College of Engineering	4/17/2012
Bucks County Community College	Provost	4/1/2014
Central State University	Provost and Vice President	3/11/2013
Central State University	Associate Dean	3/11/2013
Charles Drew Univ. of Medicine & Science	Provost	4/24/2015
Cheyney University of Pennsylvania	Provost & Vice President	6/27/2013
Clemson University	Dean of Libraries	5/13/2015
College of Saint Mary	Program Director	8/22/2013
Colorado State University Pueblo	Provost and Vice President	4/3/2013
Emory & Henry College	Founding Director of Doctor of Physical Therapy Program	7/18/2011
Fashion Institute of Technology	Dean, Jay and Patty Baker School of Business	11/25/2011
Fashion Institute of Technology	Dean	12/19/2011
Florida A & M University	Provost and Vice President	11/28/2014
Florida International University	Director of the School of Accounting	2/19/2010

Examples of Searches for Substantive Academic Units Completed by G/A&A in Past Five Years

Institution	Position	Search Closure
Florida International University	Dean, College of Nursing and Health Sciences	2/9/2011
Florida International University	Dean, Architecture and the Arts	4/21/2011
Florida International University	Dean, School of Journalism and Mass Communication	9/19/2011
Florida International University	Executive Director, MBA Programs	10/20/2011
Florida International University	Dean, College of Business Administration	1/2/2012
Florida International University	Director, School of Computing and Informatics	1/5/2012
Florida International University	Director, Latin American and Caribbean Center	1/22/2013
Florida International University	Dean of Libraries	4/1/2013
Florida International University	Dean, College of Arts and Sciences	4/3/2015
Florida State University	Dean, College of Social Work	4/30/2015
Florida State University	Dean, Panama City Campus	5/15/2015
George Mason University	Provost and Vice President of Academic Affairs	8/2/2013
George Mason University	Provost and Executive Vice President	3/18/2014
Georgia College & State University	J. Whitney Bunting Dean College of Business	7/14/2014
Georgia State University	Dean, College of Education	4/24/2014
Illinois State University	Dean of University Libraries	1/18/2010
Illinois State University	Dean, College of Nursing	3/14/2010
Illinois State University	Dean, College of Arts and Sciences	5/9/2011
Illinois State University	Dean, College of Education	4/16/2012
Indiana University Bloomington	Dean of the College of Arts and Sciences	4/21/2011
Iowa State University	Interim Dean of Libraries	8/26/2014
Iowa State University	Director, School of Education	1/1/2015
Iowa State University	Dean of Libraries	3/27/2015
Kent State University	Dean, Undergraduate Studies	1/2/2012
Kent State University	Dean and Chief Administrative Officer, Columbiana County Campuses	6/13/2012
Kent State University	Dean and Chief Administrative Officer, Trumbull Campus	1/23/2015
Kent State University Tuscarawas Campus	Dean and Chief Administrative Officer	5/16/2014
Lamar University	Provost and Vice President	2/20/2015
Lamar University	Dean, College of Engineering	3/12/2015
Lamar University	Dean, College of Education and Human Development	3/27/2015
Lamar University	Dean, College of Fine Arts and Communication	4/6/2015
Louisiana State University	Vice Chancellor and Provost	4/25/2012
Louisiana State University	Dean, E.J. Ourso College of Business	3/3/2014
Medical University of South Carolina	Associate Dean	5/22/2014
Missouri University of Science & Technology	Provost & Executive Vice Chancellor	8/2/2013
Montana State University	Dean, College of Business	3/9/2012
Montana State University	Dean of Arts and Architecture	4/17/2012
Montana State University	Dean of the Libraries	8/23/2012
Montana State University	Dean, College of Letters and Sciences	10/1/2012

Examples of Searches for Substantive Academic Units Completed by G/A&A in Past Five Years

Institution	Position	Search Closure
Montana State University	Dean of Education	10/10/2012
Montana State University	Dean, College of Engineering	12/17/2013
Montana State University	Vice President of Agriculture and Dean	9/22/2014
Morgan State University	Dean of Business	1/21/2013
Morgan State University	Dean of Liberal Arts	8/2/2013
Morgan State University	Dean, School of Community Health and Policy	1/1/2015
Morgan State University	Provost and Senior Vice President	1/1/2015
Northern Virginia Community College	Dean, Division of Communications & Human Studies	5/22/2014
Purdue University Calumet	Dean of Liberal Arts & Social Sciences	4/4/2011
Purdue University Calumet	Dean, School of Management	4/24/2012
Purdue University Calumet	Vice Chancellor	4/15/2013
Remington College School of Nursing	Dean, School of Nursing	11/10/2014
Rutgers University Camden Campus	Dean of Faculty of Arts and Sciences	4/5/2011
Sam Houston State University	Dean, College of Fine Arts and Mass Communication	8/2/2013
Sam Houston State University	Dean, Humanities and Social Sciences	4/15/2014
Sam Houston State University	Dean, College of Criminal Justice	5/11/2015
South University	Associate Dean, Pharmacy	9/5/2014
St. John Fisher College	Dean, Ralph C. Wilson, Jr. School of Education	4/22/2013
SUNY Plattsburgh	Vice President	4/3/2013
Tennessee Technological University	Provost	8/7/2013
Tennessee Technological University	Dean, School of Nursing	11/19/2014
Tennessee Technological University	Dean, College of Business	1/1/2015
Texas A&M University, Corpus Christi	Director of the Mary and Jeff Bell Library	5/9/2014
Texas Tech Health Sciences at El Paso	President and Dean	4/21/2014
Texas Tech University	Provost and Senior Vice President	1/13/2014
Texas Tech University	Dean, College of Arts and Sciences	4/24/2014
Texas Tech University	Dean of Libraries	10/27/2014
Texas Tech University	Engineering Associate Dean of Research	1/1/2015
Texas Tech University	Associate Senior Dean Industrial Engineering	1/1/2015
The Ohio State University	Dean, College of Nursing	4/29/2011
The Ohio State University	Associate Dean	4/17/2012
The Ohio State University	Dean, College of Public Health	7/22/2013
The Ohio State University	Associate Dean	11/26/2013
University at Albany	Dean, School of Social Welfare	4/30/2015
University at Albany	Dean, School of Criminal Justice	5/18/2015
University of Alabama at Birmingham	Senior Associate Dean of Academic Affairs	5/4/2011
University of Alabama in Huntsville	Provost and Executive Vice President	1/21/2014
University of Baltimore	Dean of the College of Public Affairs	3/2/2011

Examples of Searches for Substantive Academic Units Completed by G/A&A in Past Five Years

Institution	Position	Search Closure
University of Baltimore	Dean, School of Law	5/3/2012
University of Baltimore	Dean, Yale Gordon College of Arts and Sciences	12/4/2012
University of Baltimore	Dean, Merrick School of Business	7/14/2014
University of Baltimore	Dean, College of Public Affairs	12/1/2014
University of California Davis	Dean, UC Davis Extension	1/1/2015
University of California Davis	Vice Provost	6/1/2015
University of California, Davis	Dean, College of Biological Sciences	6/2/2011
University of Cincinnati	Director, School of Education	7/25/2012
University of Denver	Associate Provost	8/1/2011
University of Florida	Dean, College of Dentistry	9/10/2014
University of Houston	Dean, Conrad Hilton College of Hotel and Restaurant Mana	12/16/2014
University of Illinois at Chicago	Vice Provost	7/11/2012
University of Illinois at Urbana Champaign	Dean, College of Law	4/19/2010
University of Illinois at Urbana Champaign	Provost and Vice Chancellor	4/19/2012
University of Illinois at Urbana Champaign	Dean of the College of Media	1/8/2015
University of Iowa	Executive Associate Dean, College of Nursing	9/26/2013
University of Kansas	Vice Provost	7/14/2014
University of Kentucky	Associate Dean of Research	5/31/2012
University of Louisville	Dean, College of Education and Human Development	8/30/2011
University of Mary Washington	Dean, College of Education	4/16/2010
University of Maryland, College Park	Senior Vice President and Provost	1/22/2013
University of Massachusetts Dartmouth	Provost and Vice Chancellor	5/7/2013
University of Massachusetts Dartmouth	Dean, College of Nursing	5/21/2014
University of Massachusetts Dartmouth	Dean, College of Arts and Sciences	9/16/2014
University of Minnesota Rochester	Vice Chancellor of Academic Affairs and Student Life	7/8/2014
University of Minnesota Twin Cities	Associate Dean	2/11/2011
University of Minnesota Twin Cities	Vice President	12/7/2012
University of Missouri Kansas City	Dean of Pharmacy	3/8/2010
University of Missouri Kansas City	Dean, College of Arts and Sciences	3/1/2012
University of Missouri Kansas City	Executive Director of Urban Education Center	1/4/2013
University of Missouri Kansas City	Dean, School of Nursing	6/25/2013
University of Missouri Kansas City	Dean, Henry L. Bloch School of Management	3/4/2014
University of Missouri Kansas City	Dean of Medicine	8/8/2014
University of Missouri Kansas City	Dean, Honors College	1/8/2015
University of Nevada, Las Vegas	Executive Vice President and Provost	5/1/2012

Examples of Searches for Substantive Academic Units Completed by G/A&A in Past Five Years

Institution	Position	Search Closure
University of North Carolina at Charlotte	Dean, College of Education	5/6/2013
University of North Carolina at Charlotte	Associate Dean, College of Computing and Informatics	1/5/2015
University of North Carolina at Greensboro	Provost	6/19/2014
University of North Texas	Dean, College of Visual Arts and Design	5/21/2015
University of South Dakota	Dean, School of Education	6/3/2015
University of South Florida Polytech	Vice Chancellor of Academic Affairs	4/21/2011
University of Tennessee Chattanooga	Dean of Honors College	4/17/2013
University of Texas Arlington	Dean of Libraries	11/15/2012
University of Texas Arlington	Dean, College of Nursing	4/4/2014
University of Texas Arlington	Associate Provost	1/1/2015
University of Texas at Brownsville	Dean, School of Business	8/17/2011
University of Texas at Brownsville	Dean, College of Biomedical Sciences and Health Profess	4/17/2012
University of Texas at El Paso	Director, Physical Therapy Program	4/17/2012
University of Texas at El Paso	Dean, College of Science	4/8/2013
University of Texas at El Paso	Dean of the College of Education	9/10/2014
University of Texas at San Antonio	Dean, College of Business	4/2/2013
University of Texas at San Antonio	Dean, College of Engineering	5/9/2014
University of Texas at San Antonio	Vice Provost and Dean of the Graduate School	2/5/2015
University of Texas Rio Grande Valley	Dean of Liberal Arts	5/15/2015
University of Texas Rio Grande Valley	Dean of Science and Mathematics	5/21/2015
University of Texas Rio Grande Valley	Dean of Education	5/29/2015
University of Toledo	Dean, College of Social Justice and Human Service	4/3/2015
University of Wisconsin Madison	Vice Chancellor	12/28/2011
University of Wisconsin Platteville	Dean of Engineering	4/27/2015
University of Wisconsin Milwaukee	Dean of Health Sciences	3/14/2010
University of Wisconsin Milwaukee	Dean of School of Education	1/13/2011
University of Wisconsin Milwaukee	Dean, School of Public Health	10/3/2011
University of Wisconsin Milwaukee	Provost and Vice Chancellor	4/5/2012
University of Wisconsin Milwaukee	Dean, College of Engineering and Applied Sciences	6/13/2012
University of Wisconsin Milwaukee	Dean, School of Continuing Education	12/1/2013
Virginia Commonwealth University	Dean of Humanities and Sciences	4/4/2011
Virginia Commonwealth University	Dean, School of Engineering	12/11/2012
Virginia Commonwealth University	Provost and Senior Vice President	1/15/2015
Washington State University	Director, School of Politics, Philosophy, and Public Affairs	9/27/2014
Wayne State University	Dean of Education	4/21/2011

Examples of Searches for Substantive Academic Units Completed by G/A&A in Past Five Years

Institution	Position	Search Closure
West Virginia State University	Provost and Vice President	4/2/2014
West Virginia University	Dean of Libraries	4/2/2014
West Virginia University	Senior Associate Dean	1/1/2015
Western Michigan University	Dean, College of Education and Human Development	7/22/2013
Western Michigan University	Dean, College of Fine Arts	8/2/2013
Western Washington University	Dean, Woodring College of Education	5/16/2011

Examples of Searches for Heads of Administrative Units Completed by G/A&A in Past Five Years

Institution	Position	Search Closure
American College of Education	Director of Institutional Research	1/1/2015
American Educational Research Association	Director of Government Relations	10/1/2014
Baylor University	Vice President for University Development	4/21/2011
Baylor University	Associate Vice President for Major Gifts	2/3/2012
Clemson University	Chief Human Resource Officer	6/28/2011
Clemson University	Director, Recruitment and Compensation	3/29/2012
Cleveland State University	Director of Admissions	12/3/2013
Cleveland State University	Vice President Enrollment Services & Student Affairs	2/23/2015
College of Saint Mary	Vice President for Enrollment Services and Marketing	4/17/2012
Colorado State University-Pueblo	Vice President for Finance and Administration	8/23/2012
Colorado State University-Pueblo	Chief Information Officer	9/14/2012
East Tennessee State University	Vice President for Advancement	6/1/2015
Fashion Institute of Technology	Director of Institutional Research and Effectiveness	12/20/2012
Fashion Institute of Technology	Capital Campaign Director	7/29/2013
Florida International University	Vice President and Chief Information Officer	6/20/2011
Florida International University	Vice President for Enrollment Services	9/14/2012
Florida International University	Chief Information Officer	1/21/2013
Florida International University	Associate Vice President for Enrollment Services	8/22/2013
Florida State University	Associate Dean for Research and Learning Services	6/5/2015
George Mason University	Vice President for University Development and President	8/2/2013
Georgia College & State University	Vice President for University Advancement	12/1/2013
Illinois State University	Vice President for Student Affairs	5/4/2011
Kent State University	Campus Dean for the Columbiana County Campuses	6/13/2012
Louisiana State University	Vice President for Finance and Administration	2/19/2014
Mayo Clinic	Systems Pharmacology Investigator	4/15/2013
Medical University of South Carolina	Associate Dean for Research	5/22/2014

Examples of Searches for Heads of Administrative Units Completed by G/A&A in Past Five Years

Institution	Position	Search Closure
Minnesota State Colleges and University	Vice Chancellor of Academic and Student Affairs	5/21/2015
Montana State University	Vice President for Research, Creativity and Technology Transfer	10/24/2013
Montgomery College	Senior Vice President for Student Services	5/12/2015
Morgan State University	Vice President for Student Affairs	6/28/2012
Morgan State University	Vice President for Research and Economic Development	1/3/2013
Morgan State University	Chief Information Officer	8/5/2014
Morgan State University	Vice President for Finance and Management /CFO	1/1/2015
New Mexico State University	Senior Vice President for Administration and Finance	1/12/2012
New Mexico State University	Vice President for Advancement	2/20/2014
Northeast Ohio Medical University	Vice President for Advancement and Development	2/12/2013
Northeast Ohio Medical University	Executive Director of Enrollment Services	3/20/2013
Northeast Ohio Medical University	Executive Director of Faculty Development	3/20/2013
Northeast Ohio Medical University	Executive Director of Academic Services	4/8/2013
Northern Virginia Community College	Director of Human Resources	1/1/2015
Purdue University Calumet	Vice Chancellor for Enrollment Management and Student Affairs	4/15/2013
Salisbury University	Vice President for External Affairs and Advancement	10/31/2012
SUNY Plattsburgh	Vice President for Student Affairs	4/3/2013
Tennessee Technological University	Director of Human Resources	2/19/2014
Tennessee Technological University	Vice President for University Advancement	6/29/2015
The Ohio State University	Associate Dean for Clinical Administration & Patient Care	4/17/2012
Towson University	Vice President of Administration and Finance and Chief Financial Officer	3/28/2013
University of Alabama at Birmingham	Chair for Adult/Acute Health, Chronic Care and Foundation	4/20/2011
University of California, Davis	Vice Provost for Global Affairs	6/1/2015
University of California, San Diego	Vice Chancellor of Equity, Diversity and Inclusion	11/17/2012
University of Cincinnati	Vice President for Student Affairs	5/28/2013
University of Cincinnati	Chief Risk Officer	7/22/2014
University of Denver	Associate Provost for Inclusive Excellence	8/1/2011
University of Idaho	Vice President for University Advancement	5/28/2015
University of Illinois at Urbana-Champaign	Vice Chancellor for Research	7/10/2012
University of Kansas	Vice Provost for Diversity and Equity	7/14/2014
University of Kentucky	Associate Dean of Research	5/31/2012
University of Louisiana at Lafayette	Chief Human Resource Officer	4/22/2015
University of Maryland Medical System	Chief Development Office, Cancer Center	1/14/2015

Examples of Searches for Heads of Administrative Units Completed by G/A&A in Past Five Years		
Institution	Position	Search Closure
University of Maryland, Baltimore	Chief Development Officer and Vice President and Preside	5/16/2012
University of Massachusetts Dartmouth	CFO and Vice President for Finance and Administration	3/13/2014
University of Miami	Counseling Center Director	3/8/2012
University of Miami	Executive Director for International Programs and Studies	5/2/2013
University of Miami	Director, Counseling Center	5/11/2015
University of Minnesota - Rochester	Vice Chancellor for Academic Affairs and Student Develop	7/8/2014
University of Minnesota -Twin Cities	Associate Dean for Clinic Administration and Patient Care	2/11/2011
University of Minnesota -Twin Cities	Vice President for Equity and Diversity	12/7/2012
University of New Mexico	Vice President for Human Resources	9/2/2014
University of Wisconsin - Madison	Vice Chancellor for Research and Dean of the Graduate Studies	12/28/2011
University of Wisconsin - Madison	Director of Purchasing Services	1/25/2015
University of Wisconsin - Platteville	Executive Director of Institutional Effectiveness	5/2/2014
University of Wisconsin Milwaukee	Chief Information Officer	4/17/2013
University of Wyoming	University General Counsel	8/30/2013
University of Wyoming	Vice President for Administration	10/15/2013
Upper Iowa University	Vice President for International Programs	5/30/2012
Upper Iowa University	Associate Vice President for Finance and Planning	11/5/2012
Virginia Commonwealth University	Vice President for Diversity and Equity	6/27/2012
Virginia Poly Inst. & State University	Director of University Design and Construction	12/1/2013
Washington State University	CEO of the Foundation	5/7/2014
West Virginia State University	Vice President for University Advancement	8/23/2012
West Virginia State University	Vice President for University Relations and Operations	6/7/2013
West Virginia State University	Chief Financial Officer	3/31/2015
West Virginia University	Vice President for University Relations	8/8/2013
Winona State University	Vice President for Enrollment Management and Student Life	3/27/2015

i. Compliance with Final Rule for Section 503 of the Rehabilitation Act

Describe how the firm complies with the Final Rule for Section 503 of the Rehabilitation Act

Our process pays particularly close attention to building diverse candidate pools which includes all types of candidates, including those with disabilities.

Building Diverse Candidate Pools

We have particular strengths and strategies for building a diverse pool of candidates, including candidates with disabilities. We have built a reputation as being diversity-friendly with high success in

facilitating institutions in the hiring of diversity and underrepresented minority (URM) candidates. Our clients have appointed a woman or person of color in over 55% of our searches. We believe this is the best of all the higher education firms. Following is a list of diversity placements by G/A&A.

Behind this reputation is a philosophy regarding the support of women and minorities in leadership advancement and success. We live this philosophy in many ways.

- We are a women-owned firm with a diverse consulting team. G/A&A colleagues are predominately women with ethnic and cultural backgrounds from the US, Philippines, Trinidad, Pakistan, Puerto Rico, China and Germany.
- We work with national leadership groups advancing the careers of women and people of color. We have cultivated organizational partnerships with groups who cater to the needs and interests of minority candidates. We reach out to minority and women caucuses at professional societies in higher education for nominees, and make presentations to diverse groups aspiring to advance their careers. A strong, diverse, informal network is a critical part of any successful diversity recruitment effort.
- One of G/A&A's search specializations becomes an important asset for seeking diverse and underrepresented minorities as well as candidates with disabilities for all of our searches. We have developed a specialty area in the placement of university chief diversity officers and recently completed those searches for the University of Virginia, University of Minnesota, University of Michigan, University of Georgia, University of New Mexico, University of California, Berkeley, Susquehanna University, and University of Missouri at Kansas City. These officers are a source for diversity candidates.
- We have successfully completed many searches for Hispanic Serving Institutions and Historically Black Colleges and Universities. These hires constitute an important resource for identifying diverse candidates. Because we facilitated their hiring and because we keep up regular connections with these individuals, they take our calls and take the time to think about diversity and URM candidates for the searches that we facilitate.

We aggressively pursue a diversity advertising and outreach strategy. We maintain a detailed listing of media, association and organization outlets for diversity in and related to higher education, including outreach to candidates with disabilities. Our advertising and outreach strategy go far beyond the typical listings of gender and race/ethnic to identify URMs of very dimension. Examples of diversity advertising and outreach include:

- American Association of Hispanics in Higher Education, Inc.
- American Council on Education Office of Inclusive Excellence, Women's Network
- Association for the Study of the Worldwide African Diaspora
- Consortium of Higher Education LGBT Resource Professionals
- Diverse (formerly Diverse Issues in Higher Education) -- now including coverage of and outreach to people with disabilities working within higher education
- Hispanic Outlook
- Insight into Diversity -- now including coverage of and outreach to people with disabilities working within higher education
- Journal of Blacks in Higher Education
- LGBTQ Presidents in Higher Education
- Military Officer Association of American (MOAA) – including outreach to disabled military veterans
- National Association of Asian American Professionals

- National Association for Equal Opportunity in Higher Education – including outreach to people with disabilities
- National Association for the Advancement of Colored People (NAACP)
- Tribal College Journal
- United Negro College Fund
- Voice and Vision of American Higher Education
- Women in Academia Report
- Women in Higher Education
- White House Initiative on Asian Americans and Pacific Islanders
- White House Initiative on Historically Black Colleges and Universities

We work with our partner institutions to collect demographic data as required by federal reporting requirements, including information on candidates with disabilities. We invite applicants to self-identify as individuals with disabilities in the pre- and post-offer stages of the search. We seek to use the institution’s equal opportunity clause in all search outreach documents, and provides a member of the G/A&A search team as contact for individuals with disabilities needing any accommodations during the search process. We collect any records requested by the institution relating to diversity and disabilities among candidates.

We also use other strategies to identify and reach out to diversity and disabled candidates and URMs. As part of our outreach for nominations, we particularly emphasize the importance of finding rising diversity, disabled and URM leaders that meet the criteria of the search. We actively seek diversity, disabled and URM organizations in higher education college and university systems and in academic discipline areas. We talk to leaders and representatives of these entities to obtain names of rising leaders. We constantly ask about diversity, disabled and URM rising leaders in all of our outreach. We also reach out to higher education administration doctoral programs and ask professors and administrators for outstanding alumni with disabilities and from URM groups who are ready for next level leadership positions in higher education. Also, it is our experience that it takes two to three additional calls to convince diversity, disabled and URM leaders to apply. We go the extra mile to make these additional calls so that we can convince these important leaders to apply.

Finally, the passion for the support and pursuit of diversity among our search pools is a value and philosophy that permeates G/A&A. Drs. Greenwood and Asher were pioneer women leaders in U.S. higher education. Their deep commitment to the support of diversity leadership has meant that the push to identify such rising leaders has yielded an extraordinary database, compiled over almost 30 years in executive search, beginning with Dr. Greenwood’s initial start in executive search in 1992. We believe this to be perhaps, the largest such database of women, minorities, people with disabilities and underrepresented rising leaders in U.S. higher education – and a resource to which we add new names daily. This rich database becomes an asset for every search that we perform.

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
Albany College of Pharmacy & Health Science	Provost	Dr. Tarun B. Patel
Albany State University	President	Dr. Everette Freeman
Alcorn State University	President	Dr. George Ross
American College of Education	President	Sandra Doran, J.D.
Anne Arundel Community College	Vice President for Learning	Dr. Karen Hays
Anne Arundel Community College	President	Dr. Dawn Lindsay
Augustana College	Chair of Nursing	Dr. Janet Philipp

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
Austin Peay University	President	Dr. Alisa White
Baylor University	Associate Vice President of Major Gifts	Ms. Paula Voyles
Bowie State University	President	Dr. Mickey Burnim
BryanLGH College of Health Sciences	President	Dr. Elizabeth MacLeod Walls
Bucks County Community College	President	Dr. Stephanie Shanblatt
Cabrini College	President	Dr. Marie Angelella George
California State University – Hayward	Dean, Arts, Letters, and Social Sciences	Dr. Alden Reimonenq
California State University – Fresno	Associate Vice President for Enrollment Management	Dr. Malisa Lee
Central Michigan University	Executive Vice President and Provost	Dr. Julia Wallace
Central State University	Associate Dean for University College	Dr. Dwedor Morais Ford
Central State University	President	Dr. Cynthia Jackson-Hammond
Central State University	Provost and Vice President for Academic Affairs	Dr. Charles Ford
Charles Drew University of Medicine & Science	Provost	Dr. Steve O. Michael
Chattanooga State Community College	President	Dr. Flora W. Tydings
Cheyney University of Pennsylvania	President	Dr. Michelle Howard-Vital
Cheyney University of Pennsylvania	Vice President for Human Resources	Ms. Jo-Anne Harris
Cheyney University of Pennsylvania	Vice President for Administration and Finance	Mr. Gerald Coleman
Chicago State University	President	Dr. Thomas Calhoun
City University of Hong Kong	Deputy President	Dr. David S. Y. Tong
Clarkson University	Director, Occupational Therapy	Dr. Rondalyn Whitney
Clemson University	Dean of Libraries	Ms. Mary “Maggie” Ferrell
Clemson University	Director of Recruitment and Compensation	Ms. Rumame Samuels
Cleveland State University	Monte Ahuja Endowed Chair in Global Business	Dr. Ping Deng
Cleveland State University	Director of Admissions	Ms. Lee Furbeck
College of Saint Mary	Vice President for Academic Affairs	Dr. Christine Pharr
College of Saint Mary	Vice President for Institutional Advancement	Ms. Verlyn Schueler
Coppin State University	President	Dr. Reginald Avery
Coppin State University	Provost and Vice President for Academic Affairs	Dr. Cynthia Jackson Hammond
Coppin State University	Vice President for Enrollment Management	Dr. Reginald Ross

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
Coppin State University	Vice President for Student Affairs	Dr. Franklin D. Chambers
Delaware State University	Provost and Vice President for Academic Affairs	Dr. Harry Lee Williams
Delta State University	Provost and Vice President for Academic Affairs	Dr. Ann Lotven
Eastern Kentucky University	President	Dr. JoAnne K. Glasser
East Tennessee State University	Vice President for University Advancement	Dr. Pamela S. Ritter
Edinboro University of Pennsylvania	President	Dr. Julie E. Wollman
El Centro College	President	Dr. José Adames
Emory & Henry College	Director of Physical Therapy	Dr. Kamran Tavakol
Emory & Henry College	Founding Director of Doctor Physical Therapy Program	Dr. Lisa Zuber
Fashion Institute of Technology	Vice President of Enrollment Management and Student Success	Dr. S. Leellen Brigman
Florida Agricultural and Mechanical University	Provost	Dr. Marcella David
Florida Agricultural and Mechanical University	President	Dr. Elmira Mangum
Florida Agricultural and Mechanical University	Director of the Meek-Eaton Black Archives and Research Center	Dr. Nashid Madyun
Florida Agricultural and Mechanical University	Dean, College of Law	Angela Epps, J.D.
Florida International University	Assistant Dean for Research in the School of Nursing	Ms. Anahid Kulwicki, DNS
Florida International University	Associate Dean for Academic Affairs, College of Nursing & Health Sciences	Dr. Deborah Witt Sherman
Florida International University	Chair, Communications & Disorders	Dr. Monica Strauss Hough
Florida International University	Chair, Occupational Therapy	Dr. Kinsuk Maitra
Florida International University	College of Nursing & Health Sciences Graduate Director	Ms. Anahid Kulwicki, DNS
Florida International University	College of Nursing & Health Sciences Graduate Director	Dr. Lucie Dlugasch
Florida International University	Dean of the College of Engineering and Computing	Dr. Amir Mirmiran
Florida International University	Dean of the College of Nursing & Health Sciences	Dr. Ora Strickland
Florida International University	Dean of Libraries	Dr. Anne Prestamo
Florida International University	Dean of the School of Journalism and Mass Communication	Dr. Raul Reis
Florida International University	Director of the Latin American & Caribbean Center	Dr. Frank Mora
Florida International University	Director of the School of Accounting	Dr. Ruth Ann McEwen

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
Florida International University	Director, School of Computing and Information Sciences	Dr. S. Sitharama Iyengar
Florida International University	Director of Undergraduate Admissions	Mr. Barry Taylor
Florida International University	Executive Director and University Librarian	Dr. Laura Probst
Florida International University	Executive Director of the MBA Program	Mr. Angel Burgos
Florida International University	Nursing Faculty	Dr. Margaret Scisney-Matlock
Florida International University	Vice President and Chief Information Officer	Mr. Robert Grillo
Florida International University	Vice President for the Division of Human Resources	Dr. Jaffus Hardrick
Florida International University	Vice President for Enrollment Services	Dr. Luisa M. Havens
Florida State University	Dean, College of Applied Studies Panama City Campus	Ms. Carol Edwards
Florida State University	Dean, College of Law	Ms. Angela "Felecia" Epps
Foundation for a Healthy Kentucky	President & CEO	Dr. Susan G. Zepeda
Framingham State College	Vice President for Academic Affairs	Dr. Linda Vaden-Goad
George Mason University	Vice President of Development	Ms. Janet Bingham
George Mason University	President	Dr. Ángel Cabrera
George Mason University	Provost	Dr. S. David Wu
Georgia College and State University	Vice President for Advancement	Ms. Monica Delisa
Georgia State University	Dean, Byrdine F. Lewis School of Nursing	Dr. Nancy Kropf
Grand Valley State University	Vice President of Equity and Inclusion	Dr. Jeanne Arnold
Indiana University Bloomington	Ruth Lilly Dean of IU Libraries	Dr. Brenda Johnson
Iowa State University	Interim Dean of Library Services	Dr. Joyce Garnett
Iowa State University	Dean of University Library	Ms. Beth McNeil
Iowa State University	Director of Education	Dr. Marlene Strathe
James Madison University	Associate Professor and Program Director for the School of Leadership Studies	Dr. Susan Murphy
Kent State University	Dean of the College of Undergraduate Studies	Dr. Said Sewell
Lamar University	Dean, College of Engineering	Dr. Srinivas Palanki
Lamar University	Dean, College of Fine Arts and Communication	Dr. Derina R. Holtzhausen
Lehigh Carbon Community College	President	Dr. Ann Bieber
LeMoyne-Owen College	President	Dr. Andrea L. Miller
Lincoln College	Vice President for Academic Affairs	Dr. Martha Wilson

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
Lincoln College	Vice President for Enrollment Management	Mr. Anthony Cardenas
Mayo Clinic	Systems Pharmacologist	Dr. Hu Li
Metropolitan State University	Associate Vice President for Enrollment Management	Ms. Lori Kester
Minnesota State University Moorhead	President	Dr. Anne Blackhurst
Mississippi Valley State University	President	Dr. Donna Oliver
Missouri University of Science & Technology	Chancellor	Dr. Cheryl Schrader
Missouri University of Science & Technology	Jones Endowed Chair in Civil Engineering	Dr. Kamal H. Khayat
Montana State University	Dean, College of Arts and Architecture	Dr. Nancy Cornwell
Montana State University Missoula	Department Head/Campus Director	Dr. Sandra Benavides-Vaello
Montana State University	Dean, College of Education, Health & Human Development	Dr. Lynda Ransdell
Montana State University	Vice President for Research, Creativity, and Technology Transfer	Dr. Renee Reijo Pera
Montgomery College	President	Dr. DeRionne Pollard
Montgomery College	Associate Senior Vice President for Student Services	Dr. Monica Brown
Morgan State University	Chief Information Officer	Dr. Adebisi Oladipupo
Morgan State University	Dean of the Earl G. Graves School of Business	Dr. Fikru H. Boghossian
Morgan State University	Vice President for Finance and Management	Mr. Sidney H. Evans
Morgan State University	Vice President for Research and Economic Development	Dr. Victor R. McCrary
Morgan State University	Vice President for Student Affairs	Dr. Kevin Banks
Mountain View College	President	Dr. Robert Garza
New Mexico State University	President	Dr. Barbara Couture
New Mexico State University	Provost and Executive Vice President	Dr. Wendy Wilkins
New Mexico State University	Senior Vice President for Administration and Finance	Ms. Angela Throneberry
New Mexico State University	Vice President for University Advancement	Ms. Cheryl Harrelson
New York University	Dean of the Silver School of Social Work	Dr. Lynn Videka
North Georgia College & State University	President	Dr. Bonita Jacobs
North Lake College	President	Dr. Christa Slejko
Northern Virginia Community College	Director of Human Resources	Ms. Julie Garcia

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
Northern Virginia Community College	Dean, Communications and Studies Division (Loudoun Campus)	Dr. Catherine O'Brien
Northeast Ohio Medical University (NEOMED)	Director of Faculty Development	Dr. Abi Srihanan
Northeast Ohio Medical University (NEOMED)	Executive Director of Academic Services	Dr. Penny Smith
Northeast Ohio Medical University (NEOMED)	Executive Director of Enrollment Services	Ms. Heidi Terry
Ohio State University, The	Associate Dean for Academic Affairs, College of Dentistry	Dr. Darryl Hamamoto
Ohio State University, The	Dean of the College of Nursing	Dr. Bernadette Melnyk
Ohio State University, The	President	Dr. Karen Holbrook
Ohio University	Ohio Scholar's Research Position in Coal Syngas Utilization	Dr. Sunggyu "KB" Lee
Pennsylvania State System of Higher Education	Associate Vice Chancellor for Human Resources	Ms. Patricia Forbes
Purdue University	Dean, College of Education	Dr. Maryann Santos de Barona
Purdue University	Vice Provost for Diversity and Chief Diversity Officer	Dr. G. Christine Taylor
Purdue University Calumet	Dean of the School of Education	Dr. Alice Anderson
Purdue University Calumet	Dean of the School of Management	Dr. Jane Mutchler
Purdue University Calumet	Vice Chancellor for Enrollment Management and Student Affairs	Dr. Carmen Panlilio
Rutgers, The State University of New Jersey – Camden Campus	Dean of the Camden College of Arts and Sciences	Dr. Kriste Lindenmeyer
Saint Anselm College	Executive Vice President	Dr. Suzanne Mellon
Sam Houston State University	Dean, Humanities and Social Sciences	Dr. Abbey Zink
San Jose State University	Dean, College of Engineering	Dr. Belle Wei
South Carolina Governors School for Science and Math	President	Dr. Hector E. Flores
Southwest Minnesota State University	President	Dr. Connie Gores
Southwest Tennessee Community College	President	Dr. Tracy D. Hall
St. Cloud State University	President	Dr. Roy Saigo
St. John Fisher College	Dean of the Ralph C. Wilson, Jr. School of Education	Dr. Wendy Paterson
State University of New York at Albany	Dean, College of Arts & Sciences	Dr. Joan Wick-Palletier
State University of New York at Albany	Provost & Vice President for Academic Affairs	Dr. Carlos Santiago
Suffolk University	Provost and Academic Vice President	Dr. Patricia M. Meservey

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
Suffolk University	Vice President of Academic Affairs	Ms. Janice Griffith, Esq.
Susquehanna University	Chief Diversity Officer	Ms. Lisa Scott
Susquehanna University	Dean of Business	Dr. Alicia Jackson
Tennessee State University	President	Dr. Glenda Glover
Tennessee Tech University	Provost	Dr. Bahman Ghorashi
Tennessee Tech University	Dean of the Whitson Hester School of Nursing	Dr. Huey-Ming Tzeng
Texas Agricultural and Mechanical University, Corpus Christi	Director, Mary and Jeff Bell Library	Dr. Catherine Rudowsky
Texas Tech University	Director of the National Wind Resource Center and Cash Foundation Engineering Chair	Dr. Luciano Castillo
Texas Tech University	Chair, Nutritional Sciences	Dr. Nikhil Dhurandhar
Texas Tech University	Chairperson, Rockwell Endowed Professor – Human Development and Family Studies	Dr. Ann Mastergeorge
Texas Tech University	Dean of Library	Dr. Bella Karr Gerlich
Texas Tech University	Helen DeVitt Jones Chair in Teacher Education	Dr. Jian Wang
Texas Tech University	Chair, Department of Design (College of Human Sciences)	Dr. Sharran Parkinson
Towson University	Provost	Dr. Marcia Welsh
Towson University	Professor and Chair, Department of Nursing	Dr. Hayley D. Mark
University at Albany	Dean, School of Social Welfare	Dr. Darrell P. Wheeler
University of Alabama at Birmingham	Dean of Nursing	Dr. Doreen Harper
University of Alabama at Birmingham	Dean of Social and Behavioral Sciences	Dr. Jean Ann Linney
University of Alabama at Birmingham	Department Chair for Adult/Acute Health Chronic Care and Foundation	Dr. Jacqueline Moss
University of Alabama at Birmingham	Senior Associate Dean for Academic Affairs	Dr. Linda Moneyham
University of Alabama at Birmingham	Vice Provost for Student and Faculty Success	Dr. Suzanne Austin
University of Alabama Huntsville	Provost and Executive Vice President	Dr. Christine Curtis
University of Arizona	President	Dr. Ann Weaver Hart
University of Arkansas at Pine Bluff	Chancellor	Dr. Laurence Alexander
University of Baltimore	Dean of the Yale Gordon College of Arts and Sciences	Dr. Laura Koppes Bryan
University of Baltimore	Vice President for Advancement	Ms. Theresa Silanskis
University of Baltimore	Vice President for Enrollment Management	Ms. Miriam King
University of Baltimore	Vice President for Student Affairs	Ms. Shelia Burkhalter

Examples of Diversity Placements Facilitated by G/A&A		
Institution	Position	Diversity Hire
University of California, Berkeley	Vice Chancellor for Equity and Inclusion	Dr. Gibor Basri
University of California, Davis	Dean of the College of Biological Sciences	Dr. James Hildreth
University of California, Davis	Vice Provost and Associate Chancellor, Global Affairs	Dr. Joanna Regulska
University of California, San Diego	Vice Chancellor for Equity, Diversity and Inclusion	Linda Greene, J.D.
University of Cincinnati	Chief Risk Officer	Ms. Anita Ingram
University of Cincinnati	Vice President, Student Affairs & Services	Debra Merchant, J.D.
University of Colorado	Executive Director of Executive Programs	Mr. Nicholas Hamilton-Archer
University of Florida	Dean of Dentistry	Dr. Isabel Garcia
University of Georgia	Associate Provost for Institutional Diversity	Dr. Cheryl Dozier
University of Idaho	Vice President for Advancement	Ms. Mary Kay McFadden
University of Illinois at Urbana-Champaign	Dean of the Graduate College	Dr. Deba Dutta
University of Illinois at Urbana-Champaign	Provost & Vice Chancellor for Academic Affairs	Dr. Linda Katehi
University of Illinois at Urbana-Champaign	Vice Chancellor of Student Affairs	Dr. C. Renée Romano
University of Kansas	Vice President of Diversity and Equity	Dr. E. Nathan Thomas
University of Louisiana – Lafayette	Executive Director of Human Resources and Affirmative Action	Mr. Paul D. Thomas
University of Maryland College Park	President	Dr. Wallace Loh
University of Maryland College Park	Senior Vice President and Provost	Dr. Mary Ann Rankin
University of Maryland Eastern Shore	President	Dr. Juliette B. Bell
University of Mary Washington	Dean of the College of Education	Dr. Mary L. Gendernalik-Cooper
University of Mary Washington	President	Dr. Judy Hample
University of Mary Washington	Provost	Dr. Jay A. Harper
University of Mary Washington	Vice President for Advancement and University Relations	Mr. Salvatore M. Meringolo
University of Maryland Medical System	Chief Development Officer for the R. Adams Cowley Shock Trauma Center	Ms. Constance “Dina” Klicos
University System of Maryland	President, University of Maryland, Eastern Shore	Dr. Thelma Thompson
University of Massachusetts Dartmouth	Dean of Nursing	Dr. Kimberly Christopher
University of Massachusetts Dartmouth	Chancellor	Dr. Divina Grossman

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
University of Massachusetts Dartmouth	Provost and Executive Vice Chancellor for Academic and Student Affairs	Dr. Mohammad Karim
University of Massachusetts Dartmouth	Dean, Arts and Sciences	Dr. Jeannette Riley
University of Miami	Director, Counseling Center	Dr. Rene Monteagudo
University of Miami	Executive Director, International Programs & Services	Dr. Judith Pennywell
University of Michigan	Associate Vice President for Student Affairs and Dean of Students	Dr. Laura Blake Jones
University of Michigan	Dean of A. Alfred Taubman College of Architecture and Urban Planning	Ms. Monica Ponce de Leon
University of Michigan	Director, Center for the Education of Women	Dr. Gloria Thomas
University of Michigan	Director of National Center for Institutional Diversity	Dr. Phillip Bowman
University of Michigan	Director of the Ginsberg Center for Community Service and Learning	Ms. Theresa Cusimano
University of Minnesota	Vice President For Access, Equity and Multicultural Affairs and Vice Provost	Dr. Nancy "Rusty" Barceló
University of Minnesota	Vice President for Equity and Diversity	Dr. Katrice Albert
University of Minnesota Rochester	Vice Chancellor for Academic Affairs and Student Development	Dr. Lori Carrell
University of Missouri Kansas City	Dean of the Henry W. Bloch School of Business and Public Administration	Dr. Teng-Kee Tan
University of Missouri Kansas City	Dean of the School of Nursing and Health Sciences	Dr. Ann Cary
University of Missouri Kansas City	Deputy Chancellor for Equity, Access and Diversity	Dr. Karen Dace
University of Missouri Kansas City	Director of Affirmative Action	Ms. Grace Hernandez
University of Missouri Kansas City	Endowed Chair in Urban Education	Dr. Etta Hollins
University of Missouri Kansas City	School of Dentistry Dean	Dr. Marsha Pyle
University of Missouri Kansas City	Executive Vice Chancellor and Provost	Dr. Barbara A. Bichelmeyer
University of Nevada Las Vegas	Dean of College of Education	Dr. Chris Brown
University of Nevada Las Vegas	Executive Vice President and Provost	Dr. John Valery White
University of New Mexico	Vice President for Human Resources	Ms. Dorothy Anderson
University of New Mexico	Executive Vice President and Provost	Dr. Suzanne Ortega

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
University of New Mexico	Vice President of Alumni Relations	Ms. Dana Allen
University of New Mexico	Vice President for Enrollment Management	Ms. Carmen Alvarez Brown
University of New Mexico	Vice President for Equity and Inclusion	Ms. Jozi De Leon
University of New Mexico	Vice President for Research	Dr. Julia Fulghum
University of North Carolina at Charlotte	BOA Endowed Chair in Information Technology	Mr. Ashit Talukder
University of North Carolina at Charlotte	Chair, Department of Computer Science	Dr. Bojan Cukic
University of North Carolina at Charlotte	Dean of Education	Dr. Ellen McIntyre
University of North Carolina at Charlotte	Associate Dean, Computing & Informatics	Dr. Manuel Perez-Quinones
University of North Carolina at Greensboro	Provost	Dr. Dana Dunn
University of South Dakota	Dean of the School of Education	Dr. Donald Easton-Brooks
University of Southern Mississippi	President	Dr. Martha Saunders
University of Tennessee at Chattanooga	Founding Dean, University Honors College	Dr. Linda Frost
University of Tennessee System	Vice President for Academic Affairs and Student Success	Dr. Bonnie Yegidis
University of Texas at Arlington	Dean of the Libraries	Dr. Rebecca Bichel
University of Texas at Arlington	Dean of the College of Nursing	Dr. Anne Bavier
University of Texas at El Paso	Occupational Therapy Program Director	Dr. Christine Chen
University of Texas at El Paso	Dean of Health Science	Dr. Kathleen Curtis
University of Texas at El Paso	Director of Admissions	Ms. Luisa Havens
University of Texas at El Paso	Director of Facilities	Mr. Jorge Villalobos
University of Texas at El Paso	Director, Paso del Norte Institute for Healthy Living	Dr. Leah Whigham
University of Texas at El Paso	Program Director, Doctor of Physical Therapy Program	Dr. Deborah Diaz
University of Texas at El Paso	Provost	Dr. Junius Gonzales
University of Texas at El Paso	Dean, College of Education	Dr. Cyndi Giorgis
University of Texas at Pan American	President	Dr. Blandina Cardenas
University of Texas Rio Grande Valley	Dean of the College of Education	Dr. Patricia M. Alvarez McHatton
University of Texas Rio Grande Valley	Dean of the College of Liberal Arts	Dr. Walter R. Diaz
University of Texas at San Antonio	Dean of Engineering	Dr. JoAnn Browning
University of Texas at San Antonio	Dean of Public Policy	Dr. Rogelio Saenz
University of Texas at San Antonio	Dean of Library	Dr. Krisellen Maloney
University of Texas at San Antonio	Provost	Dr. Rosalie Ambrosino
University of Texas at San Antonio	Vice President for Student Affairs	Dr. Gage Paine

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
University of Texas at San Antonio	Vice President of University Advancement	Ms. Marjie M. French
University of Texas at San Antonio	Vice Provost and Dean of the UTSA Graduate School	Dr. DeBrenna LaFa Agbenyiga
University of Texas System	Chancellor	Dr. Francisco Cigarroa
University of Virginia	Chief Officer of Human Resources	Ms. Susan Carkeek
University of Virginia	Vice President for Diversity and Equity	Dr. William Harvey
University of Virginia's College at Wise	Chancellor	Dr. Donna Henry
University of Wisconsin-Milwaukee	Dean of the College of Health Sciences	Dr. Chukuka Enwemeka
University of Wisconsin-Milwaukee	Dean of the School of Education	Dr. Carol L. Colbeck
University of Wisconsin-Milwaukee	Founding Dean of the School of Public Health	Dr. Magda Peck
University of Wisconsin-Milwaukee	Howe Chair for Healthcare Transformation	Dr. Ronda Hughes
University of Wisconsin- Platteville	Executive Director of Institutional Effectiveness and Assessment	Ms. Nettie Daniels
University of Wisconsin- Platteville	Dean, College of Engineering, Mathematics and Science	Dr. Molly M. Gribb
Virginia Commonwealth University	Dean of the School of Engineering	Dr. Barbara D. Boyan
Virginia Commonwealth University	Provost and Vice President for Academic Affairs	Dr. Gail Hackett
Virginia Commonwealth University	Vice President of Diversity and Equity Services	Dr. Wanda Mitchell
Virginia Commonwealth University	President	Dr. Michael Rao
Virginia State University	President	Dr. Keith T. Miller
Washington State University	President	Dr. Elson Floyd
Washington State University	Director, School of Politics, Philosophy and Public Affairs	Dr. Patricia Glazebrook
Washington State University	Vice President for Information Technology Services, CIO	Dr. Sasi K. Pillay
Wayne State University	Dean of the College of Education	Dr. Carolyn Shields
Wayne State University	Nursing Faculty	Dr. Debra Schutte
Webster University	Vice President for Development and Alumni Programs	Ms. Faith Maddy
Westfield State College	President	Dr. Vicky Carwein
West Virginia State University	Vice President for Business and Finance	Dr. William H. Featherstone
West Virginia State University	President	Dr. Brian O'Harold Hemphill
West Virginia State University	Provost and Vice President for Academic Affairs	Dr. Kumara L. Jayasuriya
West Virginia State University	Vice President for University Advancement	Ms. Patricia Schumann

Examples of Diversity Placements Facilitated by G/A&A

Institution	Position	Diversity Hire
West Virginia State University	Vice President for University Relations and Operations	Ms. Erika Forsythe
West Virginia University	Dean of the College of Business and Economics	Dr. Jose V. "Zito" Sartarelli
West Virginia University	Vice President for University Relations	Ms. Sharon Martin
Western Michigan University	Dean, College of Education and Human Development	Dr. Ming Li
Wheelock College	Sylvia & James Earl Professor, Technology and Learning	Dr. Nada Dabbagh
Winona State University	Vice President for Enrollment Management and Student Life	Dr. Denise Lloyd McDowell
Winona State University	President	Dr. Judith Ramaley

TAB 6: FINANCIAL PROPOSAL

Greenwood/Asher & Associates, Inc. is a retained executive search firm, which means we are dedicated to you as a client, to the success of your search and to closure. Our commitment is to stay with you until you have selected a candidate of choice. We are not a contingency firm to do individual parts of the search process. Our retainer fee covers all recruiting, vetting and administrative support. Expenses are items for which we have a direct receipt. As a retained firm, we do not bill by the hour.

All the searches are tailor-made to the needs of the client. We can assist the client in designing a budget for the entire search. Expenditures are based on client requests. The cost of the search will be the fee and indirect expenses plus expenses with receipts based on work requirements as directed by the client.

a. Proposed Fees

What is your firm's proposed fee for providing the Services? Innovation in fee proposals may set your firm apart from the competition.

Our service is based on one-third of the total first year's estimated cash compensation for the individual employed with a minimum fee of \$60,000, whichever is higher. Our fees are competitively based and industry standard. However, negotiable fee adjustments may occur as a result of further discussion.

Reflecting a strong interest in becoming your search partner, we offer options for your consideration.

- Fixed fees/flat fee
- Maximum amount or not to exceed overall amount
- Sliding scale, fixed price fee based on final salary package
- Negotiated fees

We charge 12% of the fee for indirect expenses on the search for engagement and administrative assistance. These are difficult to track expenses such as research and internal administration, initial background checks, fax, postage, and photocopying for which there are no receipts.

- *Would firm consider a fixed fee regardless of the final compensation provided to the successful candidate?*

Yes.

- *Another possible option among others would be to propose a sliding scale, fixed price fee schedule based on final salary package.*

Yes.

- *What expenses are billed to the client?*

We bill all direct expenses with receipts separately for items such as travel, report reproduction, copying and supplies, research, express mail and phone/video/telecommunications.

- *Will there be any mark-up on expenses?*

No.

- *Describe in detail the expenses for which it would seek reimbursement.*

We ensure that expenses, such as for travel, comply with the institution's policies. We work with the client to establish pre-agreement in areas such as total sums for categories of expenses such as travel-related expenses of the G/A&A search team, for travel to search screening events by the total ground of candidates. We estimate that direct travel costs for the G/A&A team for each search will not exceed \$8,000 for the five major meetings. This estimate may rise if G/A&A is requested to make additional campus visits relating to meetings with the Board of Trustees and stakeholders. Direct costs for report reproduction, copying and supplies, research, express mail and communications will not exceed \$3,000 per search.

b. Fee Structure and Terms

Vendor should include a fee structure and terms, including provisions for the following:

- *State the fee structure for a successful candidate's voluntary or involuntary termination within the first year of employment.*

If the candidate selected to a specific position leaves that position within one (1) year without good reason or are terminated for cause, G/A & A will reinitiate, for expenses only, a search for that specific position.

- *The University's early termination of a search prior to position being filled.*

We stay with our clients until a search is completed. Either party has the right to cancel an assignment at any time, with 30 days written notice. Should you cancel an engagement, your only obligation is for accrued fees and expenses, except that a cancellation during the first month will incur an obligation of one third (1/3) of total amount stated above plus expenses.

- *Vendor's procedures for a failed search where the firm is unable to provide an adequate pool of candidates.*

Our process is designed to be efficient and effective helping you arrive at your candidate of choice. We have not had any unsuccessful searches as we stay with our clients until they have selected a candidate of choice.

- *Vendors should provide any price incentive packages for example multiple searches, etc.*

We are willing to negotiate discounted fees for multiple searches. Generally, we look at 10 percent reductions per second and third searches.

Should other placements result from our search(es), a fee of 25% of the first year's compensation will be assessed based on those hired position(s).

- *Vendors should provide fee schedule for all services requested.*

Client Expenses: Additional expenses are not included in G/A&A fees and indirect expenses. These can be invoiced through G/A&A, but are client expenses that are directed by client requests and include the following:

- *Candidates:* Most clients budget \$500-\$1,000 per person per trip. The client will have to decide how many candidates it wishes to see (e.g. five vs. ten) and should budget accordingly. The travel expenses are actual (with evidence of receipt). Some of our clients have a policy that caps daily hotel and food expenses and requires coach airfare. We are able to provide this type of detailed response and accounting if you prefer. We estimate that candidate travel costs for a first rounds of interview will not exceed \$10,000 per search estimating 10 candidates at the first round of interviews and three for campus visit interviews. We estimate that costs for campus visits for four finalist candidates for 2 day interviews will not exceed \$5,000 for candidate-reimbursable expenses.
- *Advertisements:* These are not a requirement of the firm, but are placed based on the client's request.
- *Background checks:* Some clients prefer to do part of the background checks themselves, so this cost will vary based on the requirements of the client. We typically coordinate these services for our clients. The services may include degree verification, litigation search, driving record search and credit reports. In general, the cost for the background work (beyond the reference report that is included in the fee) is typically about \$650 per candidate for which the client wants to have reports. The number of candidates for which verification is done will vary based on the needs of the client. Some clients ask that credentials be verified on a single finalist, while others prefer having it done on all those invited for final interviews. We encourage our clients to hire a private investigator and/or conduct additional background work that may be unique to their situation. Our background work meets or exceeds the higher education search industry standard; however, we are not a private investigation firm. We can make recommendations for additional services if our clients believe they are needed.
- *Research:* As a part of due diligence, we conduct a review of newspapers for which there is a subscription fee.

c. Charge Policies

Describe how the University will be charged. Include any additional discounts available for early payment of invoices.

We will bill the professional fees over the first three months of the contract period. Expenses are billed as incurred. Invoices are due and payable upon presentation and will be presented monthly. The first third of the fee will be due upon signing the contract. We offer an "electronic payment" option in lieu of paper checks if this meets the needs of the client.

We do not provide any additional discount for early payment of invoices.

d. Cost Savings

Describe how the University will benefit from cost savings by accepting the firm's proposal.

Our process is designed to be efficient and effective helping you arrive at your candidate of choice within a prescribed time line. We can perform your requirements in four or five meetings. We have the technology in the form of video conferencing to generate cost savings for our clients. We can provide access to candidate files via our website and perform most administrative functions at our end.

We also provide discounts for multiple, simultaneous searches and for second hires that come from the initial search. We also provide discounts for cluster hires.

e. Payment Terms

What are the firm's payment terms? The Successful Vendor may indicate payment terms of less than 40 days so long as those terms also contain a cash discount for early payment. For example: "5% 15/Net 40" would correspond to a 5% discount if paid in 15 days, otherwise net 30. The University will compute discounts from the date of completion of services, or from the date the correct invoice is received in Accounts Payable, whichever is later. The University will take the cash discount if payment is made within the specified time frame. Unless alternate payment terms, with cash discounts, are proposed by the Successful Vendor(s), invoices submitted to the University by the Successful Vendor(s) will be paid on a Net 40 days after receipt and approval of the corresponding invoice.

We will bill the professional fees over the first three months of the contract period. Expenses are billed as incurred. Invoices are due and payable upon presentation and will be presented monthly. The first third of the fee will be due upon signing the contract.

f. Electronic Payments

State the firm's capability for accepting electronic payments through Automated Clearing House (ACH) and/or purchasing card, SUA and provide any additional discounts that may result from paying electronically.

We offer an "electronic payment" option in lieu of paper checks if this meets the needs of the client.

g. Other Fees

Disclose any other fees that may be incurred by the university.

Client Expenses: Additional expenses are not included in G/A&A fees and indirect expenses. These can be invoiced through G/A&A, but are client expenses that are directed by client requests and include the following:

- *Candidates:* Most clients budget \$500-\$1,000 per person per trip. The client will have to decide how many candidates it wishes to see (e.g. five vs. ten) and should budget accordingly. The travel expenses are actual (with evidence of receipt). Some of our clients have a policy that caps daily hotel and food expenses and requires coach airfare. We are able to provide this type of detailed response and accounting if you prefer. We estimate that candidate travel costs for a first rounds of interview will not exceed \$10,000 per search estimating 10 candidates at the first round

of interviews and three for campus visit interviews. We estimate that costs for campus visits for four finalist candidates for 2 day interviews will not exceed \$5,000 for candidate-reimbursable expenses.

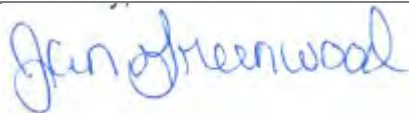
- *Advertisements:* These are not a requirement of the firm, but are placed based on the client's request.
- *Background checks:* Some clients prefer to do part of the background checks themselves, so this cost will vary based on the requirements of the client. We typically coordinate these services for our clients. The services may include degree verification, litigation search, driving record search and credit reports. In general, the cost for the background work (beyond the reference report that is included in the fee) is typically about \$650 per candidate for which the client wants to have reports. The number of candidates for which verification is done will vary based on the needs of the client. Some clients ask that credentials be verified on a single finalist, while others prefer having it done on all those invited for final interviews. We encourage our clients to hire a private investigator and/or conduct additional background work that may be unique to their situation. We recommend and coordinate the services of MintzGroup for criminal reviews. Our background work meets or exceeds the higher education search industry standard; however, we are not a private investigation firm. We can make recommendations for additional services if our clients believe they are needed.
- *Research:* As a part of due diligence, we conduct a review of newspapers for which there is a subscription fee.

TAB 7: COMPETITIVE SOLICITATION COVER DOCUMENT, ADDENDUM ACKNOWLEDGE FORMS

The completed and signed competitive solicitation cover document, along with completed and signed Addendum Acknowledgement Forms, if any. The Vendor shall complete, sign and date the cover document, but shall not alter the language provided in this competitive solicitation document or the Addendum(a) in any way; any such alterations are void.

<p>SUBMIT RESPONSE TO:</p> <p style="text-align: center;">FLORIDA INTERNATIONAL UNIVERSITY PURCHASING SERVICES MODESTO A. MAIDIQUE CAMPUS 11200 SW 8th Street CAMPUS SUPPORT COMPLEX – CSC 411 MIAMI, FL 33199 (305) 348-2161</p>	<p style="text-align: center;">INVITATION TO NEGOTIATE COVER DOCUMENT</p> <p style="text-align: center;">(“Solicitation”) ITN No. 56-001</p>
<p>RESPONSE OPENING (Date and Time): December 17, 2015 @</p>	<p>SOLICITATION TITLE: Search Firms</p>
<p style="text-align: center;">Please refer to the above address for Response opening location POSTING OF BID TABULATION AND NOTICES</p> <p>The bid tabulation and notices of a decision or intended decision and recommended award related to this Competitive Solicitation will be posted at the Florida International University Purchasing website- http://finance.fiu.edu/purchasing and will remain posted for a period of 72 hours. Failure to file a protest in accordance with Florida Board of Governors’ (“BOG”) regulation 18.002, or failure to post the bond or other security as required in BOG regulations 18.002 and 18.003, shall constitute a waiver of protest proceedings.</p>	
PURCHASING REPRESENTATIVE	<i>Chandra Nix, Procurement Manager</i>
VENDOR’S LEGAL NAME	Greenwood/Asher & Associates, Inc.
VENDOR’S MAILING ADDRESS	42 Business Centre Drive, Suite 206
VENDOR’S CITY, STATE, ZIP	Miramar Beach, FL 23550
VENDOR’S WEB ADDRESS	http://www.greenwoodsearch.com/
VENDOR’S E-MAIL ADDRESS	jangreenwood@greenwoodsearch.com
VENDOR’S FACSIMILE	850-650-2272
VENDOR’S TELEPHONE NUMBER	850-650-2277
VENDOR’S TOLL FREE NUMBER	Not available

By signing this document, I certify that this solicitation response ("response") is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a response for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this competitive solicitation and certify that I am authorized to sign this solicitation response for the Vendor and that the Vendor is in compliance with all requirements of the competitive solicitation, including but not limited to, certification requirements. In submitting a solicitation response to the University, the Vendor offers and agrees that if the solicitation response is accepted, the Vendor will convey, sell, assign, or transfer to the State of Florida all rights, title and interest in and to all causes of action it may now or hereafter acquire under the Anti-trust laws of the United States and the State of Florida for price fixing relating to the particular commodities or services purchased or acquired by the State of Florida. At the State's discretion, such assignment shall be made and become effective at the time the University tenders final payment to the Vendor.



AUTHORIZED SIGNATURE (MANUAL)

Jan Greenwood, President and Partner

PRINT NAME AND TITLE

December 15, 2015

DATE SIGNED



FLORIDA INTERNATIONAL UNIVERSITY

Purchasing Services
(305) 348-2161
FAX (305) 348-3600

December 9, 2015

ITN56-001
Search Firms

ADDENDUM #1

Re: Answers to Vendor Inquiries and revisions to Sections Section 1.4 Solicitation Response and Deliverables and Section 1.5 Evaluation Points.

VENDORS MUST ACKNOWLEDGE RECEIPT OF THIS ADDENDUM BY SIGNING BELOW AND SUBMITTING THIS EXECUTED DOCUMENT WITH YOUR RESPONSE. FAILURE TO EXECUTE AND RETURN THIS ADDENDUM FORM WILL DISQUALIFY YOUR FIRMS' RESPONSE.

This Addendum shall become part of your firms' competitive solicitation response and the subsequent contract documents if applicable. This addendum document must be attached to your Solicitation Response. Failure to execute this document and return of same with your firms' competitive solicitation response will be grounds for immediate disqualification.

Company Name Greenwood/Asher & Associates, Inc.

Address 42 Business Center Drive, Suite 206, Miramar Beach, FL 23550

Telephone/Fax/Email Phone: 850-650-2277/Fax: 850-650-2272/jangreenwood@greenwoodsearch.com

Signature [Handwritten Signature]

Form#PS008; CD04/03/07

TAB 8: ALTERNATE BRANDS OR EQUIVALENT PRODUCTS

Information regarding alternate brands or equivalent products being offered by Vendor, if any.

G/A&A does not provide any alternate brands or equivalent products.

TAB 9: SUBCONTRACTORS

Information regarding subcontractors (list of subcontractors with services to be provided by each and amount Vendor will pay to each; Vendor's certification that subcontractors are appropriately licensed and registered with the State of Florida).

All search services can be provided by G/A&A team members. No subcontracting will be needed for search procedures.

TAB 10: APPENDIX II FROM RFP

Appendix II Completed, Signed And Dated.

APPENDIX II

CERTIFICATE OF NON-SEGREGATED FACILITIES SUBPART - VENDOR'S AGREEMENTS

During the performance of this Contract, the Vendor agrees as follows:

- (1) The Vendor will not discriminate against any employee or applicant for employment because of face, color, religion, sex, or national origin. The Vendor will take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: employment, upgrading demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Vendor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the contracting officer setting forth the provisions of this nondiscrimination clause.
- (2) The Vendor will, in all solicitations or advertisements for employees placed by or on behalf of the Vendor, state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex or national origin.
- (3) The Vendor will send to each labor union or representative of workers with which the Vendor has a collective bargaining agreement or other Contract or understanding, a notice, to be provided by the agency contracting officer, advising the labor union or worker's representative of the Vendor's commitments under Section 202 of Executive Order No. 11246 of September 24, 1965, and shall post copies of notice in conspicuous places available to employees and applicants for employment.
- (4) The Vendor will comply with all provisions of Executive Order No. 11246 of September 24, 1965 and of the rules, regulations, and relevant orders of the Secretary of Labor.
- (5) The Vendor will furnish all information and reports required by Executive order No. 11246 of September 24, 1965, and by the rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the contracting agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations and orders.
- (6) In the event of the Vendor's noncompliance with the nondiscrimination clauses of this Contract or with any of such rules, regulations, or orders, this Contract may be canceled, terminated, or suspended in whole or in part and the Vendor may be declared ineligible for further Government contracts in accordance with procedures authorized in Executive Order No. 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoiced as provided in Executive Order No. 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

- (7) The Vendor will include the provision of Paragraphs (1) through (7) in every subcontract or purchase order unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to Section 204 of Executive Order No. 11246 of September 24, 1965, so that such provisions will be binding upon each subVendor or Vendor. The Vendor will take such action with respect to any subcontract or purchase orders the contracting agency may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that in the event the Vendor becomes involved in, or is threatened with, litigation with a subVendor or Vendor as a result of such direction by the contracting agency, the Vendor may request the United States to enter into such litigation to protect the interest of the United States.

SEC. 402 Affirmative Action for Disabled Veterans and Veterans of the Vietnam Era:

- (1) The Vendor agrees to comply with the affirmative action clause and regulation published by the US Department of Labor implementing Section 402 of the Vietnam Era Veteran's Readjustment Assistance Act of 1974, as amended, and Executive Order 11701, which are incorporated in this certificate by reference.

VENDOR COMPANY NAME Greenwood/Asher & Associates, Inc.

AUTHORIZED SIGNATURE 

TITLE President and Partner

DATE December 14, 2015

TAB 11: AFFIDAVIT OF TRADE SECRET CERTIFICATION

If applicable, **Appendix IV – Affidavit of Trade Secret Certification** completed and signed by a high level officer of the Vendor as to applicable trade secrets contained in the Vendor's documents; Vendor must segregate and clearly mark all documents certified in Appendix IV and include such documents in this section (tab) of Vendor's proposal.

APPENDIX IV

AFFIDAVIT OF TRADE SECRET CERTIFICATION

STATE OF _____

COUNTY OF _____

I, the undersigned, being first duly sworn, do hereby state under oath and under penalty of perjury that the following facts are true:

1. I am over the age of eighteen and am a resident of the State of _____. I have personal knowledge of the facts herein, and, if called as a witness, could testify competently thereto.
2. I am the _____ (position) of _____ (name of corporate entity), a _____ (state) _____ (type of corporate entity), whose principal address is _____.
3. [I consider/My company considers] the information contained in the document(s) entitled _____ (provide description of the information) marked as Exhibit _____ (comprised of a total of _____ pages) a trade secret under applicable law for the following reasons: *(Explain in detail the specific element(s) or provision(s) of Florida Statutes that render the document(s) at issue a trade secret.*
4. [I have/My company has] taken measures to prevent the disclosure of the information contained in Exhibit _____ to anyone other than those who have been selected to have access for limited purposes, and [I intend/my company intends] to continue to take such measures.
5. [I consider/My company considers] the information contained in Exhibit _____ to have value and provides an advantage or an opportunity to obtain an advantage over those who do not know or use it.
6. All of information in Exhibit _____ contained is not, and has not been, reasonably obtainable without [my/our] consent by other persons by use of legitimate means.
7. All of information in Exhibit _____ is not publicly available elsewhere.

8. I am the person for Florida International University to contact in the event a challenge to any information contained in this Affidavit is received.

Executed on this ____ day of _____ in _____ County,
_____(State).

Affiant- Full Name: _____

Address: _____

Telephone: _____

E-mail: _____

Affiant Signature: _____

STATE OF _____

COUNTY OF _____

Sworn to or affirmed and signed before me on by _____ (date)

_____ (Affiant).

NOTARY PUBLIC

Personally Known

Produced identification (Type of ID)



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
11/24/2015

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Asset Insurance 42 Business Centre Dr, Suite 307 Miramar Beach, FL 32550	CONTACT NAME: Britney Frazier PHONE (A/C No. Ext): 850-337-1489 FAX (A/C No.): 850-269-7597 E-MAIL ADDRESS: Info@assetinsurance.us													
	<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Guarantee Underwriters</td> <td></td> </tr> <tr> <td>INSURER B:</td> <td></td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Guarantee Underwriters		INSURER B:		INSURER C:		INSURER D:		INSURER E:		INSURER F:
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INSURER C:														
INSURER D:														
INSURER E:														
INSURER F:														
INSURED Greenwood Asher & Associates 42 Business Centre Drive, Suite 206 Miramar Beach, FL 32550														

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR. STR.	TYPE OF INSURANCE	ADD. CODES (INSR. WVD)	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-DUCT <input type="checkbox"/> LOC					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (If a commercial) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS					COMBINED SINGLE LIMIT (Per accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED. RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/OWNER EXCLUDED? (Mandatory in HI) If yes, describe under	Y/N	WCP100262503GIC	11/23/2015	11/20/2016	E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER 	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE Britney Fraizer 11/24/2015 <i>Britney Frazier</i>

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ACORD 25 (2010/05)

The ACORD name and logo are registered marks of ACORD

TAB 13: VENDOR'S SERVICES AND WARRANTIES, IF APPLICABLE

Vendor's services and warranties, if applicable.

See [Appendix B](#) for an overview of G/A&A Services and [Appendix C](#) for our menu of leadership and organizational development and change management services.

Strategy for Assisting Transition of Successful Candidates

In addition to its partnership facilitation with executive searches, G/A&A provides a wide array of support in leadership and organizational development, which includes specific support for the transitions (onboarding) of successful candidates. Not only do new hires need to transition into FIU, but each unit will need to transition in their support for new leadership.

There would be great wisdom in developing a proactive process for the first year of each new hire for transition support. See [Appendix C](#) for a menu of the Leadership and Organizational Services that G/A&A can provide. We recommend that we engage in a dialogue about needs and goals and then custom design a process that is then articulated in a follow-up contract from the searches.

TAB 14: DISCLOSURES

Disclosures regarding: (a) Vendor employees having employment relationship with FIU, State of Florida or any Florida State Agencies AND/OR (b) any FIU or State employee(s) owning an interest of 5% or more of Vendor's company or its affiliates or branches.

No G/A&A employees have employee relationships with FIU, State of Florida or any Florida State Agency.

No FIU or State employees own an interest of any percentage in G/A&A.

TAB 15: ADDITIONAL INFORMATION REQUESTED IN THE COMPETITIVE SOLICITATION

Additional information requested in the competitive solicitation and/or addenda, if applicable.

Our process is designed to be efficient and effective helping you arrive at your candidate of choice. We can perform your requirements in four or five meetings within a prescribed time line. We have the technology in the form of video conferencing to generate cost savings for our clients. We can provide access to candidate files via our website and perform most administrative functions at our end.

TAB 16: ADDITIONAL PERTINENT INFORMATION VENDOR WOULD LIKE TO PROVIDE.

Minority, Women & Florida Veteran Business Certification

State of Florida

Minority, Women & Florida Veteran
Business Certification

Greenwood/Asher & Associates, Inc.

Is certified under the provisions of
287 and 295.187, Florida Statutes for a period from:

03/28/2014 to 03/28/2016



DEPARTMENT OF MANAGEMENT
SERVICES

Craig J. Nichols
Craig J. Nichols, Secretary
Florida Department of Management Services



Office of Supplier Diversity • 4050 Esplanade Way, Suite 380 • Tallahassee, FL 32399 • (850) 487-0915 • www.osd.dms.state.fl.us

APPENDIX A: Representative List Of Clients We Have Worked with Throughout Our Executive Search and Consulting Experiences

Air University	Center for Creative Leadership	El Centro College
Appalachian State University	Central Michigan University	Emory & Henry College
Albany College of Pharmacy and Health Sciences	Central State University	Fashion Institute of Technology
Albany State University	Century College	Ferris State University – Kendall College of Art and Design
Alcorn State University	Charles R. Drew University	Florida A&M University
American College of Education	Chattanooga State Community College	Florida Atlantic University
American Education Research Association	Cheyney University of Pennsylvania	Florida Department of Education
American Psychological Association	Chicago State University	Florida Board of Governors
American University	City University of Hong Kong	Florida Gulf Coast University
Anne Arundel Community College	Clarion University	Florida International University
Appalachian State University	Clarkson University	Florida State University
Arizona State University	Clemson University	Fordham University
ASPIRA	Cleveland State University	Foundation for a Healthier Kentucky
Association of College Unions International (ACUI)	Coastal Carolina University	Framingham State College
Augustana College	College of Coastal Georgia	Franklin College
Austin Peay State University	College of Saint Mary	Franklin Institute Science Museum
Baylor University	Colorado State University	George Mason University
Bellarmino College	Columbia University	George Washington University, The
Board of Education for New York City	Columbus College of Art & Design	Georgetown University
Bowie State University	Columbus State Community College	Georgia College and State University
Boys & Girls Clubs of America	Commissioner of Higher Education for Rhode Island	Georgia Institute of Technology
BryanLGH Health System	Conference Board, Inc., The	Georgia State University
Bucks County Community College	Coppin State University	Goucher College
Butler University	Dallas County Community College District	Grand Valley State University
Cabrini College	Delaware State University	Grandfather Homes for Children
California State University – East Bay	Delta State University	South Carolina Governor’s School of Arts and Humanities
California State University - Fresno	Drexel University	Hofstra University
California State University – Hayward	East Carolina University	Independent Sector
California State University – Stanislaus	East Tennessee State University	Indiana University
	Eastern Illinois University	Indiana University of Pennsylvania
	Eastern Kentucky University	Illinois State University
	Edinboro University of Pennsylvania	Iowa State University

James Madison University
Kennesaw State University
Kent State University
Kent State University Stark
Kent State University Trumbull
Kentucky Board of Education
Kentucky Council on
Postsecondary Education
Kentucky Wesleyan College
Kutztown University
Lamar University
Lansing Community College
Lehigh University
Lehigh Carbon Community
College
LeMoyne-Owen College
Lincoln College
Lock Haven University of
Pennsylvania
Louisiana Board of Regents
Louisiana State University
Loyola College in Baltimore
LYRASIS
Mansfield University of
Pennsylvania
Marietta College
Martin University
Mayo Clinic
Massachusetts College of Art
and Design
Medical University of South
Carolina
Metropolitan State University
Denver
Michigan State University
Minneapolis Community and
Technical College
Minnesota State Colleges &
Universities
Minnesota State University
Moorhead
Mississippi College

Mississippi Institutions of Higher
Learning
Mississippi University for
Women
Mississippi Valley State
University
Missouri University of Science &
Technology
Monmouth University
Montana State University
Montana Tech of University of
Montana
Montana University System
Montgomery College
Moravian College
Morgan State University
Mount Union College
Mountain View College
Montgomery County Community
College
National Industries for the Blind
National Judicial College
Nebraska Wesleyan University
New Mexico State University
New School of Architecture and
Design
New York University
Newbury College
North Lake College
North Carolina Agricultural &
Technical State University
North Carolina State University
North Georgia College and State
University
Northeast Higher Education
District
Northeast Ohio Medical
University
Northern Illinois University
Northern Kentucky University
Northern Virginia Community
College

Northland Community and
Technical College
Ohio Board of Regents
Ohio State University, The
Ohio State University Newark,
The
Ohio University
Oklahoma State University
Orbis Cascade Alliance
Oregon Education Investment
Board
Park University
Pennsylvania College of
Technology
Pennsylvania State System of
Higher Education
Pennsylvania State University
Purdue University
Purdue University Calumet
Radford University
Ramapo College of New Jersey
Reader's Digest Association
Remington College
Rowan University
Rutgers-Camden
Rutgers-New Brunswick
Saint Anselm College
Salisbury University
Sam Houston State University
San Jose State University
South Carolina Governor's
School for Science and Math
South Dakota State University –
College of Nursing
South University
Southeastern Louisiana
University
Southern Illinois University,
Carbondale
Southwest Minnesota State
University
Southwest Tennessee
Community College

St. Cloud State University	University of Arkansas Pine Bluff	University of Massachusetts
St. John Fisher College	University of Baltimore	Dartmouth
St. John's University	University of California, Berkeley	University of Memphis
St. Louis Science Center	University of California, Davis	University of Miami
State of Ohio Department of Education	University of California, San Diego	University of Michigan
State System of Higher Education, Pennsylvania	University of California, San Francisco	University of Michigan - Flint
State University of New York at Albany	University of Central Florida	University of Minnesota
State University of New York at Buffalo	University of Cincinnati	University of Minnesota-Crookston
State University of New York at Plattsburgh	University of Connecticut	University of Mississippi Medical Center
Stephen F. Austin State University	University of Colorado	University of Missouri System
Suffolk University	University of Colorado at Denver	University of Missouri-Kansas City
Susquehanna University	University of Denver	University of Missouri-Rolla
Sweet Briar College	University of Florida	University of Nebraska-Omaha
Tennessee Board of Regents	University of Georgia	University of Nevada Las Vegas
Tennessee State University	University of Houston	University of New Mexico
Tennessee Tech University	University of Iowa	University of North Carolina-Chapel Hill
Texas A&M University Corpus Christi	University of Idaho	University of North Carolina-Charlotte
Texas Tech University	University of Illinois	University of North Carolina-Greensboro
Texas Tech University Health Sciences Center at El Paso (TTUHSC)	University of Illinois, Chicago	University of North Texas
Texas Woman's University	University of Illinois, Urbana-Champaign	University of Oregon
Towson University	University of Kansas	University of Pikeville
Tulane University	University of Kentucky	University of South Dakota
Union Institute, The	University of Louisiana	University of South Florida, Polytechnic
University and Community College System of Nevada	University of Louisiana-Lafayette	University of South Florida, St. Petersburg
University at Albany	University of Louisville	University of Southern Colorado
University of Alabama at Birmingham	University of Maryland Washington	University of Southern Mississippi
University of Alabama at Huntsville	University of Maryland-Baltimore	University of Tennessee
University of Arizona	University of Maryland-Baltimore County	University of Tennessee Chattanooga
University of Arkansas Fayetteville	University of Maryland-Eastern Shore	University of Tennessee System
University of Arkansas at Little Rock	University of Maryland-College Park	University of Texas Arlington
	University of Maryland Medical Systems Foundation	University of Texas Austin
	University of Massachusetts Amherst	University of Texas Brownsville
		University of Texas El Paso

University of Texas Medical
Branch
University of Texas Pan
American
University of Texas Rio Grande
Valley
University of Texas San Antonio
University of Texas System
University of Toledo
University of Virginia
University of Virginia's College
at Wise
University of Wisconsin-Madison
University of Wisconsin-
Milwaukee
University of Wisconsin-
Platteville

University Systems of Georgia
Upper Iowa University
Valdosta State University
Virginia Commonwealth
University
Virginia State University
Virginia Tech
Washburn University
Washington State University
Washington State University
Vancouver
Wayne State University
Weber State University
Webster University
West Chester University of
Pennsylvania

West Virginia University
West Virginia State University
Western Michigan University
Western Washington University
Westfield State College
Wheelock College
Winona State University
Wright State University
Yeshiva University
Yonkers Public Schools
Youngstown State University

APPENDIX B: Greenwood/Asher & Associates, Inc. Facts

Greenwood/Asher & Associates, Inc.

EXECUTIVE SEARCH, CONSULTING, AND TRAINING

PARTNERS: Dr. Jan Greenwood, Partner, President & CEO
Metropolitan D.C.: jangreenwood@greenwoodsearch.com or (202) 746-6987
Dr. Betty Turner Asher, Partner, Vice President & COO
Florida: bettyasher@greenwoodsearch.com or (850) 650-2277

Our organization's partners, principals, consultants, and affiliates collectively represent over 65 years of experience in global and national executive search. More than 40 Greenwood/Asher consultants and affiliates who bring you a cumulative of:

- Over 2000 searches successfully completed
- Over 300 years of combined experience in education and nonprofit organizations
- Over 100 years in organizational consulting and training
- Over 60 years in health care, including in academic health centers and public health agencies
- 26 positions held by consultants and affiliates as CEOs, Presidents, or Senior Executives

GEOGRAPHIC REACH: Jan Greenwood is based in the Washington, DC metropolitan area. Consultants and affiliated consultants have been located throughout the United States: Washington, D.C., Virginia, Maryland, Florida, Alabama, Georgia, Tennessee, Colorado, Illinois, California, Indiana, Massachusetts, North Carolina, Washington, Texas, Montana, Ohio, Minnesota, Nebraska, and Oregon.

EXECUTIVE SEARCH SERVICES:

For education clients, our consultants and affiliates have completed searches for Commissioners, Chancellors, Presidents, Provosts, Vice Presidents, Vice Chancellors, Deans, School Superintendents, Endowed Chairs, cluster hires, and completed consulting assignments for the following types of institutions:

AASCU Colleges and Universities	K-12 Schools
AAU Universities	APLU Universities
Academic Health Centers	Public and Private Research Universities
Community and/or Technical Colleges	State College and University Systems and
Independent Colleges and Universities	State Coordinating Boards
Historically Black Colleges and Universities	Hispanic Serving Institutions

We have specialists who have completed for example searches for Commissioners, Chancellors, Presidents; Provosts; CIOs; Vice Presidents for Health Affairs, Student Affairs, Enrollment Management, Advancement, Business/Finance/Administration; Athletics; Deans for Arts and Sciences, Engineering, Architecture, Medicine, Pharmacy, Dentistry, Nursing, Health Sciences, Social Work, Law, Education, Sciences, Business, HPER, Informatics, Libraries, Visual and Performing Arts; Center Directors; Endowed Chairs; and Cluster Hires

For academic health center clients, our consultants and affiliates have conducted executive searches including cluster hires and consulting for the following types of positions:

Executive Vice President for Health Affairs	Center Director
Dean of the College of Medicine	Endowed Chair

42 Business Center Dr.
Suite 206 Miramar Beach, FL 32550
Miramar Beach, FL 32550
United States

PHONE (850) 650-2277
FAX (850) 650-2272
E-MAIL jangreenwood@greenwoodsearch.com, bettyasher@greenwoodsearch.com
WEB SITE <http://www.greenwoodsearch.com>

Greenwood/Asher & Associates, Inc.

EXECUTIVE SEARCH, CONSULTING, AND TRAINING

For intercollegiate athletic searches, Alden & Associates, Inc. is our strategic partner and we have conducted searches for the following types of positions:

Athletics Director
Senior Associate/Associate

Head Coaches
Athletics Directors

For nonprofit and for profit organizations, our consultants and affiliates have conducted searches for example for the following organizations:

The Conference Board
Boys and Girls Clubs of America
Independent Sector
Foundation for a Healthier Kentucky
American Psychological Association
National Industries for the Blind

Aspira
Jesse Ball duPont Foundation
Reader's Digest Association
Collegis
Center for Creative Leadership

For consulting and training, our consultants and affiliates have worked with over 2,000 institutions and conducted more than 1,000 studies, workshops, seminars, and/or training sessions. Examples of areas of expertise include:

Governance Studies
Planning
Workshops
Executive Evaluations
Branding
Transition Planning and Onboarding
Compensation Studies

Policy Analysis and Development
Institutional
Organizational Structure Studies
Board/Directors
Strategic and Tactical Leadership Initiatives
Benchmark Studies
Curriculum Studies
Strategies for Increasing Government and
Political Support and Funding

WHAT YOU CAN EXPECT WHEN YOU CHOOSE G/A&A:

- Responsiveness from a G/A&A partner and personal attention
- Successful completion of your assignment
- Timely response to your sense of urgency 24/7
- A team and partnership relationship
- Ongoing communications throughout the search and after completion
- Use of technology to reduce expenses, allow immediate access to information,
- Expertise in working in freedom of information states
- Active pursuit of diversity
- Consulting experience you can trust
- Innovation and flexibility
- Focus on getting the job done
- Cost effective fees
- The core values of G/A&A are built into all of our work
- Our process and products are predictable as a result of our branding...our clients know what to expect provide a smooth process

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WEB SITE <http://www.greenwoodsearch.com>

APPENDIX C: Menu Of Leadership And Organizational Consulting Services



Greenwood/Asher & Associates, Inc. is committed to helping higher education institutions, associations and organizations address their leadership and organizational advancement and change management issues. We provide advice, guidance and support in these areas:

Transitions and Succession Management

- Planning and implementing leadership change and succession
- Onboarding support for executives and other strategic hires
- Assessing, supporting and coaching executives and strategic faculty hires
- Facilitating and differentiating strategic and tactical leadership initiatives
- Planning and implementing communication strategies

Leadership Development and Capacity Advancement

- Coaching senior and emerging leaders for long term success
- Creating and assessing high performance leadership teams, including presidential and VP cabinets, deans, and department chairs
- Assessing and developing boards of all types, including Trustees
- Facilitating workshops/retreats for leadership teams
- Supporting leadership and faculty teams in an inclusionary culture
- Optimizing leadership effectiveness and organizational capacity
- Ameliorating dysfunctional cultures in academic units (“department doctoring”)

Organizational Design, Change Management, and Implementation

- Clarifying, benchmarking, and designing organizational roles, processes and structures
- Assessing, designing, and initiating change management processes
- Supporting governance collaboration and performance
- Preparing and executing Institutional strategic planning
- Advancing academic planning, quality and capacity
- Benchmarking structures, policies, programs and support
- Studying government political support and funding for improved performance
- Analyzing and developing policy
- Addressing campus crisis readiness
- Mediating and supporting conflict-resolution

Jan Greenwood Ph.D., President & Partner
Betty Turner Asher Ed.D., Vice President & Partner
[Greenwood/Asher & Associates, Inc.](#)

Sharon A. McDade Ed.D.,
Principal & Senior Executive Leadership Consultant
Office Phone: (703) 567-3388
Mobile: (571) 481-0946
E-mail: sharonmcdade@greenwoodsearch.com

Corporate Office Address: The Summit
42 Business Center Drive, Suite 206
Miramar Beach, FL 32550 995
Phone: (850) 650-2277/ Fax: (850) 650-2272
Web: www.greenwoodsearch.com

APPENDIX D: Letter of Reference



Board of Trustees

226 Tigert Hall
PO Box 113150
Gainesville, FL 32611-3150
352-392-1311
352-392-9506 Fax

October 31, 2014

Dr. Jan Greenwood, President
Greenwood/Asher & Associates
Center Drive, Suite 206,
Miramar Beach, Florida 32550

Re: University of Florida Presidential Search

Dear Jan:

I am writing as the Chair of the University of Florida Board of Trustees and Presidential Search Committee to express deep gratitude to you, Julie Holley and the rest of the Greenwood/Asher & Associates team for the exceptional, expert service you provided in the search for the University's 12th President. The high quality of your contacts among leaders of the nation's AAU and other academic research universities, your experience in public and private presidential searches, the frequent updates you offered for coordination, the thoroughness of your referencing, and the good judgment and advice you shared served the search and our University well, and enabled me to focus my efforts most effectively. You became a member of the University's team and worked collaboratively for the success of the search and the best interest of the University.

The result speaks volumes: on October 15th, UF's Board selected Dr. W. Kent Fuchs, Provost of Cornell University, as University of Florida's next president and we expect Dr. Fuchs to be confirmed by the Board of Governors on November 6th. Through the work of the Search Committee, your firm and other stakeholders, with the trusting relationships you have developed among national academic research leaders, and with the rise in visibility of UF's academic accomplishments, there was a high level of interest in the search and the applicant pool included a number of highly talented leaders. Three applicants were the candidates interviewed by the search committee and two were the finalists interviewed by the Board. All of those interviewed are impressive and accomplished individuals with high academic distinction and leadership abilities, as well as successful senior management experience in large, complex and highly ranked AAU research institutions. Dr. Fuchs has all of these abilities and experiences, as well as a proven record of exceptional fundraising, strategic planning, institutional transformation, diversity and inclusion, and team-building. The response to Dr. Fuchs' recruitment at UF and in the academic research community is enormously positive and energizing, and I thank you and Greenwood/Asher for the important part you played.

The Foundation for The Gator Nation
An Equal Opportunity Institution

Dr. Jan Greenwood, President
Greenwood/Asher & Associates
October 31, 2014
Page 2

It is worthy of note that, in UF's 2014 presidential search, your team built on your experience and excellent work on UF's 2004 presidential search (under the leadership of Search Chair and then Board Chair, Manny Fernandez) and UF's 2012 presidential search (under the leadership of Search and Board Chair, David Brown), as well as your nation-wide experience on AAU and other research university presidential searches. UF's 2012 presidential search, which was on the cusp of success, ended so that the University could seize unexpected opportunities, best initiated by President Machen, to pursue UF's long-held preeminence goals, and not for any reason associated with the search. In the 2014 search, you and the Search Committee were able to capitalize on the official recognition of UF's academic research preeminence and the related funding and distinguished faculty hiring efforts that began in the year and a half between searches. The Greenwood/Asher team expertly and meaningfully communicated this history and these developments, marketing University of Florida and the presidential position most beneficially.

Please feel free to use this letter as a professional reference for you and Julie Holley when needed by Greenwood/Asher in connection with other university searches. Jamie Lewis Keith and I are also available to supplement this letter by phone if that would be helpful.

The Greenwood/Asher team, led by you and Julie Holley, has contributed importantly to the future of University of Florida through your excellent work on the 2014, as well as on prior, presidential searches. I wish you continued success and again thank you for your distinguished service to University of Florida.

Sincerely,

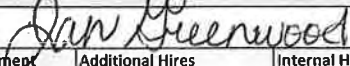


Steven M. Scott
Chair,
University of Florida Board of Trustees
2014 University of Florida Presidential Search Committee

Cc: C. David Brown, II, member and former Chair, UF Board of Trustees, 2012 Search Committee Chair
Manny Fernandez, former Chair, UF Board of Trustees, 2004 Search Committee Chair
Jamie Lewis Keith, Vice President, General Counsel and University Secretary

Competitive Solicitation ITN56-001 Search Firms

Best and Final Offer (BAFO)

Suppliers Name: Greenwood/Asher		Submitted by: JAN GREENWOOD						Signature: 		Date: 3/8/2016				
	Proposed Professional Fees	Indirect/Administrative Fees	Direct Fees	Candidate leaves or Is terminated	Cancellation of search	Failed Search	Price incentives	Early Payment Discount	Additional Hires	Internal Hires	Payment Terms	ACH/SUA/P card Payment	University & College Aggregate Annual Spend Discount	Individual Aggregate Annual Spend Discount
FIU's/SUS Financial Proposal Request (BAFO)	Flat fee per tier salary ranges as follows:<\$150,000 salaries=\$50,000; \$150,000-\$199,999 salaries=\$55,000; \$200,000-\$250,000 = \$75,000. Other negotiated rates will apply for UF, FSU, UCF, USF, and FIU. Other negotiated rates will apply for presidential searches at all universities and for positions with salaries exceeding \$250,000. G/A has provided savings for completed searches to the Florida universities as follows: approximately \$196,775.00 in indirect expenses and \$1,417,571 in fees for a total savings to universities of \$1,614,346.00.	9% of the proposed fee with fee obligations not to exceed 3 months	Advertising, Videoconferencing, Candidate and Consultant Travel, Meals and Lodging, Background Checks exclusive of referencing, phone, committee materials, and research with Factiva <i>Background checks have to be at the discretion and approval of FIU. FIU may at its own discretion decide to do the background checks.</i>	If employee separates for any reason within 18 months, conduct another search at no fee or indirect cost but will be billed all direct expenses.	Fees, indirect expenses and direct expenses are to be paid in full up to date the search is cancelled.	Continue fully committed search efforts until search is completed at no additional fees. <i>Please define "monthly search continuation expenses".</i>	For positions with salaries over \$200,000; If 2 concurrent searches by the same university, a 5% discount; 3 or more concurrent search a 10% discount on professional fees.	2% if paid within 15 days of accepted invoice by both parties	To clarify the meaning of additional hires: If a candidate who is presented for an original search, is selected by the university for another position that the Hiring Authority determines they are a fit, we are asking for half of the fee of the original search. If the candidate applies to a position at the University that is not an original search on their own recognizance, the university will not have to pay a fee. Greenwood answer: Half of fee for original search, plus direct expenses. All candidates will be processed by G/A to insure equity of treatment of candidates.	Up to \$10,000 for position filled with candidate not presented by the firm. <i>Need to offer discount rate.</i>	1/3 upon signing agreement, 1/3 upon presentation of candidates, 1/3 when finalist accepts offer of employment. An exception is if there is a delay (which is not controlled by G/A) in hiring a candidate past the G/A & client approved schedule, in which case the fee, indirect and direct expenses will be due in full on the approved schedule closure date.	We do not have credit card payments but we do accept electronic payments	Total of all Universities and Colleges aggregate spend exceeds \$500,000 a 1% discount and over \$1,000,000 an additional 1% discount for professional fees <i>Replace "all professional fees" with "all fees".</i>	University or College's individual total aggregate annual spend exceeds \$250,000 a 2% discount for professional fees <i>Replace "all professional fees" with "all fees".</i>
Supplier's Revised Financial Proposal		Indirect expenses are not fees, but are the indirect costs for doing the searches. When multiple searches are conducted at a university at the same time, the indirect expenses will be negotiated with 12% being the standard for the 1st search.	Advertising, Videoconferencing, Candidate and Consultant Travel, Meals and Lodging, Background Checks exclusive of referencing, phone, committee materials, and research with Factiva			Continue fully committed search efforts until search is completed at no additional fees. If for reasons not under the control of G/A, the hiring authority approved schedule for the search is exceeded, monthly search continuation expenses may be due. These expenses are for the costs related to continuing the search beyond the mutually agreed to schedule. While this rarely happens, the monthly continuation expenses have been based on what has to be done and the circumstances around the search not closing as planned.				All candidates to be treated fairly will be presented through G/A, regardless of how the candidate came into the search. There is no discount for the search based on how the candidates came into the search. The fees are for G/A work for the entire search.			Total of all Universities and Colleges aggregate spend on fees, not including indirect and direct expenses, exceeds \$1,000,000 in one year a 1% discount for fees over \$1,000,000 will apply for professional fees within the next calendar year.	discounts are already built in within other categories. Fees do not include and are separate from indirect and direct expenses.

Search Process	Candidate Evaluation	Search Updates	Interviews	Selection/Offer	Sunshine Laws/EEO/OFCCP Requirements	Candidate Experience	Background/Reference Checks	Hard to Fill positions
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EXHIBIT III

FIU/SUS Service Level Proposal Requests	No additional information needed.	• Do you provide pre-screening of all candidates before they are presented to the committee?	• How often and in what form are progress and status reports delivered?	• How does your firm assist the institution in scheduling interviews?	No additional information needed.	• How does your firm ensure adherence to Sunshine Laws? • Will the firm work with our application process? • How do you capture EEO demographic information?	• What are the service level agreements to ensure a great candidate experience? • What are your minimum response times to candidate?	• At what point are the 360 degree references, (supervisors, colleagues and direct reports) conducted?
Supplier's Revised Service Level Proposal	Agreed	yes	At least weekly in the mode of communication the client prefers.	At the university's request, we can do all scheduling.	Accept	G/A is considered to be an expert on Florida's Sunshine requirements and has completed approximately 50 searches successfully within the sunshine. We are a Florida located firm and committed to follow Florida laws. We meet and exceed EEO requirements and report results. we will follow university requirements.	Our policy is a one day turnaround time for emails and phone calls. Yes we will work with the university application process. We capture EEO information from our data base and research and when the university prefers, we also use its forms with candidates.	These are completed on the semi finalists or at the time the university requires and the candidates agree. We are committed to making additional calls necessary to recruit. We are committed to inform clients about market realities of position as they have described it by their required, desired and preferred qualifications.

Please provide a best and final (BAFO) based on the negotiations conducted, and the revised proposal as outlined in this spreadsheet. There are additional items highlighted in BOLD that the committee has strongly requested to change in your best and final offer (BAFO). Please submit your best and final (BAFO) to the FIU Representative Chandra Nix at nixc@fiu.edu by 3/09/16. This information, along with the information submitted in your original proposal and revised proposal will be binding and considered during final evaluation.