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|  | <h2>Request for Quotes</h2> | Solicitation Number: USC-RFQ-3669-DG |
| | | Date Issued: December 7, 2020 |
| | | Procurement Officer: Dennis Gallman |
| | | Phone: 803-777-4115 |
| | | E-Mail Address: gallmand@mailbox.sc.edu |
| | | Mailing Address: 1600 Hampton Street; Ste 606 Columbia, SC 29208 |

DESCRIPTION: Assist the University of South Carolina in a national search for the selection of Director of Diversity Education and Inclusive Excellence

USING GOVERNMENTAL UNIT: **UNIVERSITY OF SOUTH CAROLINA**

The Term "Offer" Means Your "Bid" or "Proposal". Your offer must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior. See "Submitting Your Paper Offer or Modification" provision.

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| SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES: | |
| MAILING ADDRESS: University of South Carolina – Purchasing Department 1600 Hampton Street, Suite 606 Columbia SC 29208 | PHYSICAL ADDRESS: University of South Carolina – Purchasing Department 1600 Hampton Street, Suite 606 Columbia SC 29208 |

SUBMIT OFFER BY (Opening Date/Time): **December 15, 2020 at 9:00 AM (EST)** (See "Deadline For Submission Of Offer" provision)

E-MAIL QUESTIONS TO : Dennis Gallman; gallmand@mailbox.sc.edu

NUMBER OF COPIES TO BE emailed : 1 (one)

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|---|---------------------------------|
| CONFERENCE TYPE: Not Applicable DATE & TIME: (As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions) | LOCATION: Not Applicable |
|---|---------------------------------|

You must submit a signed copy of this form with Your Offer. By signing, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of thirty (30) calendar days after the receipt of quotes

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|--|--|
| NAME OF OFFEROR (full legal name of business submitting the offer) | Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. The entity named as the Offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc. |
| AUTHORIZED SIGNATURE (Person must be authorized to submit binding offer to contract on behalf of Offeror.) | DATE SIGNED |
| TITLE (business title of person signing above) | STATE VENDOR NO. (Register to Obtain S.C. Vendor No. at www.procurement.sc.gov) |
| PRINTED NAME (printed name of person signing above) | STATE OF INCORPORATION (If you are a corporation, identify the state of incorporation.) |

| | | | |
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| OFFEROR'S TYPE OF ENTITY: (Check one) | | | (See "Signing Your Offer" provision.) |
| <input type="checkbox"/> Sole Proprietorship | <input type="checkbox"/> Partnership | <input type="checkbox"/> Other _____ | |
| <input type="checkbox"/> Corporate entity (not tax-exempt) | <input type="checkbox"/> Corporation (tax-exempt) | <input type="checkbox"/> Government entity (federal, state, or local) | |

PAGE TWO
(Return Page Two with Your Offer)

| | | |
|---|--|-----------|
| HOME OFFICE ADDRESS (Address for Offeror's home office / principal place of business) | NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent.) (See "Notice" clause) | |
| | Area Code - Number - Extension | Facsimile |
| | E-mail Address | |

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|---|---|
| PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause) | ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses) |
| <input type="checkbox"/> Payment Address same as Home Office Address <input type="checkbox"/> Payment Address same as Notice Address (check only one) | <input type="checkbox"/> Order Address same as Home Office Address <input type="checkbox"/> Order Address same as Notice Address (check only one) |

| ACKNOWLEDGMENT OF AMENDMENTS | | | | | | | |
|--|----------------------|---------------|----------------------|---------------|----------------------|---------------|----------------------|
| Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision) | | | | | | | |
| Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date | Amendment No. | Amendment Issue Date |
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| DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause) | 10 Calendar Days (%) | 20 Calendar Days (%) | 30 Calendar Days (%) | _____ Calendar Days (%) |
|---|----------------------|----------------------|----------------------|-------------------------|

PREFERENCES - A NOTICE TO VENDORS (SEP. 2009): On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at www.procurement.sc.gov/preferences. ***ALL THE PREFERENCES MUST BE CLAIMED AND ARE APPLIED BY LINE ITEM, REGARDLESS OF WHETHER AWARD IS MADE BY ITEM OR LOT. VENDORS ARE CAUTIONED TO CAREFULLY REVIEW THE STATUTE BEFORE CLAIMING ANY PREFERENCES. THE REQUIREMENTS TO QUALIFY HAVE CHANGED. IF YOU REQUEST A PREFERENCE, YOU ARE CERTIFYING THAT YOUR OFFER QUALIFIES FOR THE PREFERENCE YOU'VE CLAIMED. IMPROPERLY REQUESTING A PREFERENCE CAN HAVE SERIOUS CONSEQUENCES. [11-35-1524(E)(4)&(6)]***

PREFERENCES - ADDRESS AND PHONE OF IN-STATE OFFICE: Please provide the address and phone number for your in-state office in the space provided below. An in-state office is necessary to claim either the Resident Vendor Preference (11-35-1524(C)(1)(i)&(ii)) or the Resident Contractor Preference (11-35-1524(C)(1)(iii)). Accordingly, you must provide this information to qualify for the preference. An in-state office is not required, but can be beneficial, if you are claiming the Resident Subcontractor Preference (11-35-1524(D)).

☐ In-State Office Address same as Home Office Address
☐ In-State Office Address same as Notice Address **(check only one)**

ACQUIRE SERVICES (JAN 2006)

The purpose of this solicitation is to acquire services complying with the enclosed description and/or specifications and conditions. [01-1010-1]

PREFERENCES - A NOTICE TO VENDORS (SEP 2009)

On June 16, 2009, the South Carolina General Assembly rewrote the law governing preferences available to in-state vendors, vendors using in-state subcontractors, and vendors selling in-state or US end products. This law appears in Section 11-35-1524 of the South Carolina Code of Laws. A summary of the new preferences is available at www.procurement.sc.gov/preferences. All the preferences must be claimed and are applied by line item, regardless of whether award is made by item or lot. Vendors are cautioned to carefully review the statute before claiming any preferences. The requirements to qualify have changed. If you request a preference, you are certifying that your offer qualifies for the preference you've claimed. Improperly requesting a preference can have serious consequences. [11-35-1524(E)(4)&(6)] [02-2B111-1]

PREFERENCES - RESIDENT CONTRACTOR PREFERENCE (SEP 2009)

To qualify for the RCP, you must maintain an office in this state. An office is a nonmobile place for the regular transaction of business or performance of a particular service which has been operated as such by the bidder for at least one year before the bid opening and during that year the place has been staffed for at least fifty weeks by at least two employees for at least thirty five hours a week each. In addition, you must, at the time you submit your bid, directly employ, or have a documented commitment with, individuals domiciled in South Carolina that will perform services expressly required by the solicitation and your total direct labor cost for those individuals to provide those services must exceed fifty percent of your total bid price. [11-35-1524(C)(1)(iii)] Upon request by the procurement officer, you must identify the persons domiciled in South Carolina that will perform the services involved in the procurement upon which you rely in qualifying for the preference, the services those individuals are to perform, and documentation of the your labor cost for each person identified. If requested, your failure to provide this information promptly will be grounds to deny the preference (and, potentially, for other enforcement action). [02-2B113A-1]

PREFERENCES - RESIDENT SUBCONTRACTOR PREFERENCE (SEP 2009)

To qualify for this preference, You must meet the following requirements. (1) You must -- at the time you submit your bid -- have a documented commitment from a single proposed first tier subcontractor to perform some portion of the services expressly required by the solicitation. (2) The subcontractor -- at the time you submit your bid -- must directly employ, or have a documented commitment with, individuals domiciled in South Carolina that will perform services expressly required by the solicitation and the total direct labor cost to the subcontractor for those individuals to provide those services exceeds, as applicable, either twenty percent for a 2% preference or forty percent of bidder's total bid price for a 4% preference. (3) You must identify the subcontractor that will perform the work, the work the subcontractor is to perform, and your factual basis for concluding that the subcontractor's work constitutes the required percentage of the work to be performed in the procurement. [11-35-1524(D)] You can stack this

preference, i.e., earn another 2% or 4% preference for each additional qualifying subcontractor, but the preference is capped. [11-35-1524(D)(4), (E)(7)] Upon request by the procurement officer, you must identify the persons domiciled in South Carolina that are to perform the services involved in the procurement upon which you rely in qualifying for the preference, the services those individuals are to perform, the employer of those persons, your relationship with the employer, and documentation of the subcontractor's labor cost for each person identified. If requested, your failure to provide this information promptly will be grounds to deny the preference (and, potentially, for other enforcement action). **YOU WILL NOT RECEIVE THE PREFERENCE UNLESS YOU SPECIFY WHETHER YOU ARE CLAIMING THE 2% OR 4% PREFERENCE AND YOU PROVIDE THE INFORMATION REQUIRED BY ITEM (3) ABOVE.** [02-2B113B-1]

III. SCOPE OF WORK/SPECIFICATIONS

It is the intent of the University of South Carolina to solicit quotes from qualified search firms to assist the University in its national search for the selection of **Director of Diversity Education and Inclusive Excellence** for the University of South Carolina in accordance with all requirements stated herein.

Search Firm Requirements:

Mandatory Contractual Requirements:

The Search Firm (Contractor) must specialize in recruitment for public sector leadership positions in a higher educational environment and must possess experience and qualifications in conducting successful searches for positions in professional schools or colleges or similar positions for organizations of similar size and complexity to the University of South Carolina.

Please provide a complete list of current higher education clients who have received or are currently receiving services similar to those requested herein and a short description of the work your company performed.

The Search Firm (Contractor) will perform the following services:

1. Upon commencement of the contract between the Search Firm (contractor) and the University of South Carolina, set meetings with stakeholders to ascertain required information regarding ideal candidates for the position.
2. From the existing position descriptions, develop a candidate profile, including the knowledge, skills and abilities required to become a successful candidate for the position(s). Coordinate with the Vice President for Diversity, Equity and Inclusion to ensure the list meets requirements.
3. Assist the stakeholders in developing a strategy for carrying out the recruitment of the position, including outreach to encourage applicants from diverse backgrounds to apply.

4. Identify potential contacts and conduct personal outreach recruiting, including posting the position(s) through national channels.
5. Review the Curriculum Vitae (CV) of each applicant and assist in determining those applicants meeting minimum requirements and preferred qualifications.
6. If required, schedule with the stakeholders a session to clarify the experience and qualifications of those candidates on the short list.
7. With the Vice President for Diversity, Inclusion and Equity's advice and approval, design and finalize the campus interview process and interview questions. Coordinate candidates' participation in interviews including travel arrangements.
8. Debrief with the stakeholders following campus interviews, and identify additional candidates if necessary.

CANDIDATE INFORMATION:

Director of Diversity Education and Inclusive Excellence

University of South Carolina's Office of Diversity, Equity and Inclusion (ODEI) seeks a Director of Diversity Education and Inclusive Excellence.

The Office of Diversity, Equity and Inclusion (ODEI) at the University of South Carolina, leads and supports university-wide initiatives focused on the recruitment of a diverse faculty, staff, and student body, while fostering an inclusive and equitable university community. The Office of Diversity, Equity and Inclusion works closely with university students, faculty and staff to create and sustain an inclusive learning, living and working environment where all members of the university's community feel that they are welcomed, valued and supported.

The Director of Diversity Education and Inclusive Excellence develops, plans, and executes educational programming for faculty and staff at the University of South Carolina that promotes understanding and engagement on issues related to diversity and bias prevention, addressing emerging areas of need, and connecting emerging institutional initiatives to national best practices in equity, diversity, and inclusion.

Serves as a strategic thought leader that builds, maintains, and shares resources (tools, training opportunities, etc.) to increase capacity of the campus community to engage across difference. Through comprehensive campus engagement, supports the university's commitment to fostering an inclusive learning and working environment. Assesses training needs through both systematic assessments and informal discussions.

Reports directly to the Vice President for Diversity, Equity and Inclusion.

Job-Specific Responsibilities

Specific Duties include but are not limited to:

- The Director of Diversity Education and Inclusive Excellence has responsibility for envisioning educational campaigns and platforms, such as symposia and colloquiums that extend the venues and targets of educational outreach, as well as conducting a variety of training to support and enhance leadership and staff development related to diversity, equity, and inclusion.
- Assesses the effectiveness of training programs and initiatives in accomplishing desired aims.
- Works closely with the Human Resources Organizational and Professional Development team to align special requests with the most effective outcomes, when diversity and inclusion training is required.
- Works closely with HR, Provost's Office, and the Council of Academic Diversity Officers to incorporate diversity and inclusion understanding into other recruitment efforts (e.g., faculty/staff recruiting, orientation).
- Determines the most appropriate delivery methods for training, including instructor-led, virtual, computer-based, or blended learning.
- Monitors departmental budgets. Hires, supervises, and evaluates staff, including such potential positions as trainers, instructional designers, and coordinators.
- Establishes and maintains relationships with key stakeholders and leaders across campus in order to ensure awareness of training delivery, learning needs, and educational programming.
- Partners with Student Affairs, Human Resources, the Provost's Office, and others to support the co-curricular engagement of students and faculty and develop educational initiatives targeting faculty and staff.
- Manage project team members; facilitate team meetings,
- with key stakeholders,
- Other duties as assigned by VPDEI in order to facilitate ODEI goals/objectives.
- Present clear and concise information in both written and oral formats, to include creating and responding to correspondence; presenting informational briefings to various audiences;

Basic Qualifications:

- A master's degree in adult education, psychology, social science or a related field and five years of professional training experience (including three years of experience delivering diversity and inclusion training), which includes supervisory or managerial experience, or an equivalent combination of education, training, and experience.
- Excellent interpersonal skills and cultural competencies in order to interact with a wide range of individuals, including staff at all levels, faculty and administrators.
- Outstanding communication and presentation skills as well as overall aptitude for understanding and communicating about complex and sensitive diversity, equity and inclusion topics in ways that are interesting and relevant to a wide range of audiences.

- Experience with and knowledge of best practices for recruiting and retaining a diverse faculty and staff.
- Experience using quantitative and/or qualitative data to assess initiatives and inform decision-making.
- Strong supervisory skills to select, lead, and motivate professional staff (including student workers and volunteers) as well as a highly collaborative style with the energy, maturity and leadership to serve as a unifying force.
- Ability to develop strong relationships and internal partnerships to advance diversity and inclusion;
- Communicating transparently and respectfully; and
- Excellent written and oral communication skills.
- Ability to balance multiple demands, and with a strong focus on getting things done.
- Demonstrated ability to work collaboratively in a collegial environment.
- Excellent analytical and problem-solving skills combined with attention to detail for complex, detail-oriented work.
- Effective verbal and written communication skills.
- Ability to work independently, as a team member, and across departmental boundaries in a fast-paced environment.
- Flexibility to be organized, productive and effective in a dynamic environment, involved with a variety of simultaneous projects and workflows.

Preferred Qualifications:

- PhD in adult education, psychology, social science or a related field and five years of relevant work experience in higher education or a non-profit organization.
- Experience leading educational workshops in a college environment. Program development experience in a research-intensive environment is strongly desired.
- Demonstrated ability to work with campus partners to develop and sustain support for programmatic activities.
- Demonstrated success in relationship building and a track record of leveraging resources to accomplish strategic objectives.

MINORITY PARTICIPATION (DEC 2015):

Is the bidder a South Carolina Certified Minority Business? ☐ Yes ☐ No

Is the bidder a Minority Business certified by another governmental entity? ☐ Yes ☐ No

If so, please list the certifying governmental entity: _____

Will any of the work under this contract be performed by a SC certified Minority Business as a subcontractor? ☐ Yes ☐ No

If so, what percentage of the total value of the contract will be performed by a SC certified Minority Business as a subcontractor? _____

Will any of the work under this contract be performed by a minority business certified by another governmental entity as a subcontractor? ☐ Yes ☐ No

If so, what percentage of the total value of the contract will be performed by a minority business certified by another governmental entity as a subcontractor? _____

If a certified Minority Business is participating in this contract, please indicate all categories for which the Business is certified:

☐ Traditional minority

☐ Traditional minority, but female

☐ Women (Caucasian females)

☐ Hispanic minorities

☐ DOT referral (Traditional minority)

☐ DOT referral (Caucasian female)

☐ Temporary certification

☐ SBA 8 (a) certification referral

☐ Other minorities (Native American, Asian, etc.)

(If more than one minority contractor will be utilized in the performance of this contract, please provide the information above for each minority business.)

The Department of Administration, Division of Small and Minority Business Contracting and Certification, publishes a list of certified minority firms. The Minority Business Directory is available at the following URL: <http://osmba.sc.gov/directory.html>

[04-4015-3]

QUALIFICATIONS OF OFFEROR (MAR 2015)

(1) To be eligible for award, you must have the capability in all respects to perform fully the contract requirements and the integrity and reliability which will assure good faith performance. We may also consider a documented commitment from a satisfactory source that will provide you with a capability. We may consider information from any source at any time prior to award. We may elect to consider (i) key personnel, any predecessor business, and any key personnel of any predecessor business, including any facts arising prior to the date a business was established, and/or (ii) any subcontractor you identify. (2) You must promptly furnish satisfactory evidence of responsibility upon request. Unreasonable failure to supply requested information is grounds for rejection. (3) Corporate subsidiaries are cautioned that the financial capability of an affiliated or parent company will not be considered in determining financial capability; however, we may elect to consider any security, e.g., letter of credit, performance bond, parent-company corporate guaranty, that you offer to provide. Instructions and forms to help assure acceptability are posted on procurement.sc.gov, link to "Standard Clauses & Provisions." [05-5005-2]

AWARD TO ONE OFFEROR (JAN 2006)

Award will be made to one Offeror. [06-6040-1]

Bidding Schedule

Cost. Provide cost proposal for scope of services, including all applicable fees and expenses/charges you expect to be reimbursed for, to assist the University of South Carolina in its national search for the position.

COST TO PERFORM SERVICES AS DESCRIBED: \$ _____

Resident Contractor Preference _____

Resident Sub-Contractor Preference (2%) _____ Number of Sub-Contractors _____

Resident Sub-Contractor Preference (4%) _____ Number of Sub-Contractors _____

Note: The service preferences do not apply to a bid for an item of work by the bidder if the annual price of the bidder's work exceeds \$50,000 or the total potential price of the bidder's work exceeds \$500,000. [11-35-1524(E)(3)]

Please refer to the preference clauses listed in the additional conditions of this solicitation to ensure that you qualify to select the above preferences.

Bidder is to submit the following for preferences requested above:

- 1) Identify the subcontractor to perform the work:
- 2) Identify the work the subcontractor is to perform:
- 3) Bidder's factual basis for concluding that the subcontractor's work constitutes the required percentage of the work to be performed in the procurement.