REQUEST FOR PROPOSAL

INTRODUCTION

The College is issuing a Request for Proposal (RFP) to select a company to provide executive search services for Lake-Sumter State College in finding a replacement for the retiring President.

Sealed proposals subject to the terms, conditions and specifications contained herein are hereby made part of this request. All proposals must be fully executed, organized and placed into a single Portable Document Format (PDF) file and a Flash Drive and sealed in a manila envelope. The envelope must be addressed as follows:

RFP for Executive Search Services  
Attn: Dick Scott, Sr. Vice-President for Business Affairs  
Lake-Sumter State College  
9501 U.S. Hwy. 441  
Leesburg, FL  34788

All RFP’s must be received and physically located in the Office of the Sr. Vice-President for Business Affairs no later than 2:00 p.m. on March 2nd, 2015 at which time proposals will be opened and recorded. Any proposals that arrive in the Office of the Sr. Vice President for Business Affairs after this time will be disqualified. The proposals will not be immediately evaluated and will be given to the Proposal Evaluation Team at a later date. Firms selected to give oral presentations will be contacted to set up an appointment. All firms who have submitted a proposal and those that have been short-listed for oral presentations will be listed at http://www.lssc.edu/staff/Pages/Departments/Purchasing/default.aspx

A.) Scope of Work

The Consultant shall, through due diligence and its expertise, conduct a national Presidential search, recruiting and prescreening a group of potential candidates that shall yield a final field of candidates found “acceptable” to the District Board of Trustees for further consideration.

Primary services shall include:

- Execute a national search for qualified candidates utilizing a set of minimum criteria and job description approved by DBOT.
- Confirming the legitimacy of identified minimally qualified candidates.
- Facilitate access of qualified candidate profile information for review by a Search Committee.
- Provide enough qualified candidates for the screening committee to yield a final field of candidates found “acceptable” to the College for further consideration.
  
  ---- While ultimately at the discretion of the District Board of Trustees, it is anticipated that the number of potential finalists will be less than 6.

- Execute comprehensive background checks on “acceptable” finalist candidates; including criminal, driving, credit, social media, and any other commonly searched repository of information.
Secondary services shall include:

- Providing remote and in-person progress updates to both the Search Committee and the DBoT as negotiated.

Execution of all services shall be in full compliance with the best ethical practices of the Association of Executive Search Consultants (AESC) and the National Association of Executive Recruiters (NAER) as well as applicable federal and Florida laws.

Service shall be considered rendered and complete upon DBoT acceptance of the Screening Committee’s recommended finalists.

B. Instructions for Preparing Proposals

Proposal Format – Initial written screening criteria

A. For ease of evaluation
   1. Proposal must be submitted both in writing and electronically except as denoted in (C) below
   2. If printed from electronic file, proposal must print clearly on 8 ½" x 11" paper
   3. Proposal information, except for signatures, may not be handwritten

B. Number of Copies

Proposal shall submit Six (6) Hardcopies w/Labeled Tabs and One (1) Electronic copy of the full and complete RFP submittal, complete with all supporting documentation (i.e.; photographs, drawings, and exhibits) in a single Portable Document Format file (PDF) on a flash drive, or DVD, and enclosed in a sealed box or envelope.

C. Submit with the electronic proposal response in a separate sealed envelope and marked “Confidential” one (1) each audited (preferred) balance sheet and profit and loss summary for the previous three (3) calendar/fiscal years.

D. In support of material responsiveness review, the College’s Sr. Vice President for Business Affairs and/or its designee will review the financial data to determine eligibility in the RFP process. Determination will be made on a “qualified/not qualified” (pass/fail) basis at the sole opinion of the College. Points will not be awarded. Those Proposers who are determined to be not qualified will be eliminated from further consideration.

E. The proposal should be divided by electronic Tabs into the sections identified below with references to parts of this RFP done on a section-by-section basis. The sections shall be numbered and named:

1. Minimum Requirements
2. The Firm & Staff Qualifications & Past Experience (40 points)
3. Proposed Executive Search Process Elements/Timeline (40 points)
4. References (20 points)

Total 100 points
Proposer may provide additional relevant information in separate tab(s) at the end of the proposal. This additional information may not exceed 10 pages in length.

C. Initial Response
Proposers shall include the following information/submittals:

A. Letter of Intent: This letter will summarize in a brief and concise manner, the Proposer’s understanding of the Scope of Work and make a positive commitment to provide the services during the contract term. The letter must be signed by an official authorized to make such commitments and enter into a contract with the College. The letter must indicate the official’s title or authority. The letter should not exceed one pages in length. Provide a brief statement of qualifications that includes the firm’s size, geographic location in relation to the project, and the office that will support the contract for this project.

B. Proposal submission (or Statement of No Proposal Submittal)

C. Acknowledgment of Addendum: Include the acknowledgement page (signed and dated) of the last/final addendum issued by the College, if applicable.

D. Proposer Information

E. Corporate Information: If proposer is a corporation, provide a copy of the certification from Florida (or other state) Secretary of State verifying Proposer’s corporate status and good standing.

F. Subsidiaries: Name any subsidiary or affiliated companies in which principals have a financial interest, only as it relates to the performance of the contract. Explain in detail the principals’ interest in this company and nature of business.

G. History of Firm: Indicate firm history (chronologically).

H. Proof of insurance and licenses: The Consultant shall possess all necessary insurance, licenses and permits to perform services as outlined in the contract documents.

D. Firm & Staff Qualifications & Past Experience
Provide the following information:

1) A proposed project staffing plan chart. Define all proposed full-time and part-time executive search consultants planned to lead/work on the College’s national executive search project; make sure to identify their names, titles, years with your firm, and the percentage of time dedicated to this project.

2) Provide a brief resume (no more than 1 page each) of staff proposed to work in this effort. Include the following:
   a) Years of experience in this type of role/assignment with current firm and with other firms;
   b) Years overall experience with current firm and with other firms doing similar work;
   c) Education (degree(s), specialization, certificates);

3) Provide an organizational chart.

4) Define your current executive search backlog and ability for the proposed firm consultant staff to begin on this RFP Executive Search Services project by March, 2015.
5) At what public community colleges/public state colleges are you currently managing similar national executive search services?

6) Provide a brief overview of your firm’s unique qualifications and what gives your firm a distinct advantage over other firms.

7) Share with us your knowledge of, and experience with, conducting searches for presidential positions and its challenges.

8) Explain the process you use to successfully search and place high-level executives, like the one we are searching for.

9) Identify which educational entities in our target candidate market space, if any, you have restrictive “off-limits” agreements that would prevent you from recruiting executives from their organizations.

E. Work Plan/Proposed Executive Search Process/Elements/Timeline
   A. Provide, in detail, your work plan including the timeline, milestones and tasks that your firm is proposing; identify company and personnel responsibilities, go/no-go check points, etc.
      - Should help support meeting a preferred goal of enabling the College District Board of Trustees to tender an offer to a College President by no later than October 2015 with a start date of January, 2016.
   B. Identify any ways in which your proposed process falls short of, or exceeds, the minimum requirements outlined in Section A (Scope of Work).
   C. Include with your proposal:
      1) What events and processes including marketing activities, recruitment activities and steps your firm recommends be included as part of the Screening and Interview phase.
      2) How your firm proposes to keep College decision makers informed as to qualified candidates.
      3) How your firm proposes to conduct background checks of identified “finalist” applicants.
      4) Proposed process steps and recommended timeline to complete the College President Search/Screening Process preferably prior to October 20th, 2015.
   D. Identify what strategies your firm would implement to deal with/address competing presidential searches.

F. References
   In order to evaluate the abilities of the proposer to perform the services requested, information about the proposer must be provided to determine the firm’s ability to meet all of the RFP SOW/requirements, which are to be considered in the award of this RFP. This section identifies specific reference information that must be included below in the proposal to be assigned RFP Evaluation reference Points.

   A. Current Clients: List clients currently under contract.
   B. Related Experience: Include information regarding previous or current experience with commercial contracts of similar size and/or dollar value.
   C. Reference List:
i. Three client references should preferably be directly related in which the proposer provided the same services as being proposed to the College, preferably to a State of Florida Public Community College or other Public State institution of higher education.

ii. The references defined must include the name of your client and a contact person’s telephone number/email address and a summary of the services provided by your company to the specific client.

iii. **Do not include as a reference:**
   a. References which are located in foreign countries
   b. The College DBot members or staff members
   c. (Contact with DBot members or staff members will disqualify Proposer)

D. You may provide supplementary letters of reference.