The Rector and Visitors of the University of Virginia
On behalf of its Medical Center

Request for Proposal #SH-041621

UVA Health CRM/PRM

Issued By:
Medical Center Contracts and Procurement
University of Virginia Medical Center
Charlottesville, Virginia

April 16, 2021
A. GENERAL INFORMATION

Request for Proposal (RFP) Name: UVA Health CRM/PRM

RFP Number: #SH-041621

Issue Date: April 16, 2021

Brief Description: The Rector and Visitors of the University of Virginia, a Virginia public corporation, on behalf of its Medical Center (hereinafter “Medical Center” or “University”) seek an experienced firm to provide a Customer Relationship Management (CRM) and Physician Relationship Management (PRM) platform

Proposal Due Date: The due date for this proposal is May 14, 2021. Proposals are to be sent using the contact information below. By email, provide a full electronic version of the RFP. The University of Virginia (the “University”) may, at its discretion, accept late proposals if it is determined to be in the best interest of the University.

Expected Award Date: June 2021

Term of Agreement: The term of a resulting Agreement or Purchase Order will be for three years, with the ability to renew on the same terms and conditions, for two additional one-year periods if mutually agreeable to the University and the Selected Firm. The Selected Firm and the University will mutually agree at least 180 days prior to each renewal period whether to renew the terms of the Agreement.

Refer all questions to: University of Virginia Medical Center
Medical Center Contracts and Procurement
Attention: Shelley Hawkins
Email: shelley.hawkins@virginia.edu

This Request for Proposal (RFP) has been posted on Procurement Services web site for your convenience. Addenda and attachments are posted if issued. The RFP can be downloaded at this web site: http://www.healthsystem.virginia.edu/internet/SCM. It is the firm’s responsibility to ensure that the latest version of the entire RFP and related links are reviewed prior to submission of a proposal. We encourage you to check the web site frequently for any changes prior to the due date. For questions about the content of the RFP, contact Shelley Hawkins listed above.

For ease of reference, each firm or individual receiving this RFP is referred to as a “firm” and the firm or individual selected to provide services for the University is referred to as the “Selected Firm.” This RFP states the instructions for submitting proposals and the procedure and criteria by which a firm may be selected.
Overview of the Medical Center:

1. Locations and Services

UVA Medical Center houses the outpatient and inpatient clinical portion of UVA Health which also includes the Schools of Medicine and Nursing, the Claude Moore Health Sciences Library and UVA Physicians Group (UPG). Inpatient and outpatient services are provided in a number of geographic locations which must be served by clinical and financial information systems. UVA Health has routinely been included in rankings of high quality providers including Magnet® recognition for nursing excellence and quality patient outcomes, U.S. News and World Report’s Best Hospitals (#1 hospital in Virginia for fourth consecutive year in 2019) and Best Children’s Hospitals (eight nationally ranked specialties in 2019), and Best Doctors in America. Plans are underway for additional future facility and clinical program development which will be integral parts of the patient, family and clinician experience. The current and future array of services and sites include:

a. University Hospital (UH)

A full service, 10-story, 800,000 square foot academic medical center originally opened in 1989 offering the comprehensive array of inpatient and outpatient diagnostic, treatment and support services, serving a wide geographic region extending beyond Virginia into West Virginia, North Carolina, Maryland and beyond, including primary through quaternary care. It is staffed by more than 7,000 clinicians and staff, as well as over 1,000 volunteers. UH includes a Level I Trauma Center and a Level 4 Neonatal Intensive Care Unit. Ground and air transportation capabilities support and allow transport of patients from accident scenes, other hospitals and other locations. The inpatient services consist of approximately 600 beds.

A hospital expansion project is currently underway that has provided a new home for the Emergency Department, expanded interventional services and an additional 3 inpatient units, which will allow for more private rooms.

b. UVA Children’s

UVA Children’s provides primary and specialty care in more than 30 specialties to children throughout Virginia. It is nationally ranked by U.S. News & World Report and includes a hospital-within-a-hospital at UVA Medical Center with 111 beds, a dedicated pediatric emergency department, a Neonatal Intensive Care Unit for infants, a Pediatric Intensive Care Unit for children younger than 18 and the UVA Child Health Research Center. The Battle Building, opened in 2014, consolidates outpatient children’s care at a single location in Charlottesville.

i. The 200,000-square-foot Battle Building at UVA Children’s Hospital is consolidating UVA’s outpatient care for children. It brings together hundreds of doctors and healthcare staff devoted to caring for kids and families into a building designed to place children at ease and promote healing. Children can receive primary care as well as care from pediatric providers in dozens of specialties, including allergy, cardiology, hematology/oncology and teen health.

ii. Outreach Clinics – Physicians conduct Field Clinics throughout Virginia, providing pediatric subspecialty care in at least seven communities not able to support key subspecialties.

c. University of Virginia Outpatient Surgery Center

Located within the Battle Building, the Outpatient Surgery Center is comprised of twelve ORs and two procedure rooms as well as recovery room and related support services. A full array of anesthesia and surgical services is provided in this setting. Patients can be easily transported from the center to the UH if necessary for additional care or overnight stay if needed.

d. UVA Transitional Care Hospital

A 40-bed long term acute care hospital was established to expand the UH inpatient bed capacity and enhance operations and financial stability by relocating patients who require high intensity medical services with lengths of stay exceeding 25 days.

e. Emily Couric Clinical Cancer Center

Emily Couric Clinical Cancer Center, located across the street from University Hospital, provides the full array of services needed by patients with all kinds of cancer. The vision of those who planned the cancer center is that it will be “a place where families can come to be supported in their fight against cancer, knowing that they will receive the most advanced therapies possible. It is a place where their humanity will be valued, their individuality honored, and
their intellectual, emotional, and spiritual struggle sustained.” The Emily Couric Clinical Cancer Center is designed to accommodate advances in such areas as genetic diagnosis and analysis, informatics, and molecular biology and is organized so that all disciplines and services can easily be brought to the patient to provide individualized care that is both sophisticated and tightly integrated. At the same time, the building is the center of a community that extends for hundreds of miles in all directions. The Emily Couric Clinical Cancer Center houses all outpatient services for adults diagnosed with cancer, including:

- Comprehensive services for patient-centered care
- Complete radiation-oncology treatment services
- Clinical trials office
- Complete patient and family services
- Clusters of exam and consultation rooms
- Telemedicine capabilities: Immediate and constant access to patient information is one of the most important conditions for the multidisciplinary care of cancer patients and is a foundation of success in this endeavor.

f. **UVA Dialysis Program**

The Dialysis Program at UVA Health is one of the largest academic medical center programs in the country, consisting of 12 facilities in Central Virginia offering self-care, home hemodialysis, home nocturnal dialysis and peritoneal dialysis. UVA Dialysis also supports in-patient dialysis within UVA Medical Center offering hemodialysis, peritoneal dialysis, continuous renal replacement therapy and therapeutic apheresis. Acute inpatient dialysis is provided in four additional hospitals located regionally in the communities where outpatient dialysis is offered.

g. **UVA Encompass Health Rehabilitation Hospital**

A joint venture 40-bed rehabilitation hospital is located at Fontaine Research Park; this facility provides comprehensive rehab services for UVA and other patients needing such services who have been discharged by local hospitals.

h. **Outpatient Services On Grounds**

A wide variety of outpatient clinics are located in several sites in the vicinity of UVA. All are connected by enclosed walkways. The onsite clinics include:

- **Primary Care Center** – primary and specialty services located in a 125,000 square foot clinic adjacent to University Hospital; opened in 1977:
  - Dermatology
  - EEG and EP
  - Family Medicine
  - Heart and Vascular Center
  - Neurology
  - Gynecology
  - Pulmonary
  - Gamma Knife

- **West Complex** – an eight story 240,000 square foot facility constructed in 1960 and renovated over the past 20 years. Outpatient specialty services, in addition to administrative and office space, include:
  - Breast Care Center
  - Ophthalmology
  - Plastic Surgery
  - Kidney Center (Dialysis) and Kidney Center Clinic
  - Neurosurgery
  - Surgery Clinic
  - Urology
  - Transplant Clinic
  - Infectious Disease
  - Travelers Clinic

i. **Outpatient Services Off Grounds**

A need for additional space as well as a desire to be more accessible and convenient for patients resulted in the development and expansion of services in sites off the main UVA grounds:
• Fontaine Research Park – subspecialty clinics, including Diabetes Education, Heart & Vascular Center, Primary Care, ENT, Urology, PMR, Orthopedics, Hand Center, and Pituitary Clinic among others
• Northridge – a 60,000 square foot medical office building located about 4 miles west from the Medical Center, constructed in 1989 and including primary and subspecialty clinics:
  o Cardiology and Thoracic Cardiovascular Surgery
  o Internal Medicine
  o Ophthalmology
  o Pediatrics
  o Women’s Center – obstetrics, gynecology, Midlife Center, mammography
• Orange – Medicine, pediatrics, some medical specialty clinics
• Continuum Home Health & Home Infusion – home health provides services in 15 localities and home infusion in Virginia and North Carolina
• Provider Based Primary Care locations – primary care practices located in communities surrounding Charlottesville operated as Provider Based Clinics, including Zion Crossroads, Stoney Creek and Albemarle Family Medicine clinic
• Regional Primary Care – seven primary care offices owned and managed by UPG located primarily in rural regions surrounding Charlottesville including the Shenandoah Valley
• Telemedicine Program – UVA Health provides telehealth services throughout Virginia, serving rural communities and prisons with specialty care not routinely available.

j. UVA Imaging

A joint venture with Outpatient Imaging Associates (OIA) provides comprehensive imaging services at the Fontaine Research Park and Northridge. The UVA Department of Radiology provides medical staff for the centers, which provide accessible, patient-friendly services that are convenient for patients seen at UVA Clinics primarily at that location including Orthopedic Surgery and Physical Medicine and Rehabilitation.

k. Partnerships and collaborations
The Medical Center has cultivated and values a distinct complement of partnerships and collaborations across the region. These include:
Novant Health UVA Health System – a regional health system that includes three medical centers
Collaborations for specialty care with Bon Secours Health System
Program of All-inclusive Care for the Elderly (PACE) a collaborative with JABA and Riverside Health
Radiosurgery Centers with Riverside Healthcare
Management services and medical direction for the stereotactic radiosurgery and stereotactic body radiotherapy services at Winchester Medical Center
Collaboration with Hospice of the Piedmont to provide a 10-bed inpatient hospice unit at the UVA Transitional Care Hospital
A pediatric liver transplant partnership with Children’s Hospital of Pittsburgh of UPMC

2. Customer Related Entities and Affiliates:

• Related Entities. UVA Physicians Group (UPG), its majority owned subsidiaries listed below, and the University's majority owned subsidiaries listed below shall hereinafter be referred to as "Related Entities." UPG is the University of Virginia Physicians Group, a Virginia not-for-profit corporation that furnishes clinical services, including the practice plan for physician faculty at the University. The majority owned subsidiaries are: Community Medicine University of Virginia LLC, Virginia Urologic Foundation and University of Virginia Imaging LLC.

• Affiliates. Customer Affiliates include but not be limited to, health care providers, of whatever legal form, that UVA or the Related Entities owns or controls, or with which UVA or the Related Entities has entered into an agreement for the furnishing of health care services (or services directly in support of health care services) for consideration, or which are physician practices which refer patients to the University, whether under the University's existing organizational and network structure or under future arrangements. Examples include Riverside UVA Radiosurgery. However, the term "Affiliate" does not include a Health Care Software Vendor or an entity that furnishes primarily data processing services as, or predominantly in the nature of, a data processing service bureau.
I. SCOPE OF GOODS AND SERVICES

Request

UVA Health is seeking a Customer Relationship Management (CRM) and Physician Relationship Management (PRM) platform that allows the health system to meet the goals and objectives stated below. While funding and management of the platform will be handled by the Office of Strategic Marketing and Communications, this will be a health system resource and will import and export data from and to other departments and data sources. It is expected that other stakeholders across the health system will be heavily involved in the selection and use of the platform.

UVA Health prefers an integrated CRM/PRM system that allows for management, reporting, analysis, etc., to occur within a single administration interface, however, vendors specialized in either CRM or PRM are invited and encouraged to participate. The partner ecosystem and interoperability will be of significant importance for non-integrated vendors.

CRM Goals

UVA Health and specific CRM goals include:

- Aggregate core marketing outreach functions such as outbound marketing, lead nurturing and data collection into a single CRM platform.
- Automatic data collection through campaign creation and tracking tools.
- Segmentation and lead scoring through tools that work across marketing campaigns and health records.
- Low-code integration with UVA Health vendors, such as Epic, Genesis, Tableau, Data Studio and Twilio.
- Batch record management including updating, field matching, deduping, etc.
- Data and list governance through centralized tools and roles.
- Access to additional algorithms, data sets and prescriptive logic through selected vendor or third-party partners.

CRM Functionality

To achieve the stated goals, it is expected that the selected system will include:

- Fully integrated, cloud-based database which meets UVA Health and HIPPA requirements for cloud hosting, data management, data at rest, and data in motion.
- Full featured automated marketing platform including campaign creation, tracking, email, automated nurturing, subscribe/unsubscribe management, forms creation and landing pages.
- Lead tracking, tagging and lead flow through forms and tracked calls.
- Integration or partnerships with virtual visit vendors, such as Zoom for Healthcare, Cisco Webex or Doxy.me.
- Prescriptive tools and datasets for modelling, segmentation, analysis and campaign creation or a partner ecosystem that provides the same.
- Established and defined onboarding process for UVA Health administrators and users.
- Tools (beyond APIs) for automated or scheduled data exchange.
- Advanced reporting and visualization tools and partnerships with visualization vendors.

Functionality and services that would elevate a firm’s proposal include:

- Tools and services that allow UVA Health to extract trends and understanding from text and unstructured data. These might include artificial intelligence or machine learning tools and services.
- Quickstart and campaign duplication tools and features for reduced onboarding and campaign setup time.
- Social media monitoring and social campaign creation tools.
- Call center integration (UVA Health uses Genesis today, but is building and enhanced, central access platform with some level of CRM integration).
- Test or sandbox setup during the RFP and contract process.

Submissions should include information that details the
• Features of the CRM as noted above. It isn’t necessary to break out submission material into the bullet points above, but fully describe the core and differentiation features and integrations in a manner that fully describes the product.
• Pricing model including seat costs (UVA Health anticipates a need for 10 CRM seats) or other costs and determinants based on the pricing model.
• Consumer data, third-party data or any other data or add on services not included in the pricing model above. Also see the last bullet point on contracts.
• Professional services model and pricing, as needed for setup and any other configuration or customization.
• Support services including the level of service in the proposed contract and any other levels or features outside of the proposed level.
• Security features or security level included in the contract, selected vendors will be required to satisfy a UVA Health security assessment prior to contract implementation.
• A list of at least three reference customers. References will not be contacted without prior vendor notification.
• Sample contract(s) and any additional terms required by vendor. If multiple contracts are required for subcontractors, systems, services, etc., clearly articulate the relationships and components governed by each contract and provide a sample of those contracts or terms.

Questions and Information
UVA Health will reach out to selected vendors to answer additional questions after the RFP deadline.

PRM Goals
UVA Health seeks a PRM system to enable the physician relations team to better understand referring patterns and track activities and track progress. UVA Health also aims to use the PRM system for outbound physician engagement and communication. Major goals include:

• Understand physician relationship strength
• Gain market intelligence for specific physician service areas and physician service lines/specialties
• Analyze effort and results to understand areas of growth and opportunity
• Minimize the time required to accomplish daily tasks in the PRM tools
• Reach out to our referring physicians with news, operational changes and other communications
• Articulate efforts and insights to UVA Health leadership and providers through analytics and reporting tools

PRM Functionality
UVA Health seeks a PRM platform that has the following features and capabilities:

• Tools to document and monitor complaints/issue management with reporting capabilities by physician, specialty and practice location
• Tools to report outreach visits per office by title, i.e. MD, NP, PA, Office Manager, Referral Coordinator, etc. with reporting capabilities
• Tools to document and monitor complaints/issue management with reporting capabilities by physician, specialty and practice location
• Batch record and claims management including updating, field matching, deduping, etc.
• Mapping/tracking capabilities to identify physician locations and outreach efforts
• Third-party claims for the Virginia with quarterly updates and physician network analytics.
• Medicare/Medicaid claims data with quarterly updates and a controlled margin of error
• Track relationships and efforts based on definitions for types of clinical service consistent with UVA standards (DRG’s, ICD-10, CPT codes)
• Reporting tools and templates with export features, report scheduling and customizable options
• Tools that reveal market trends in physician relationship strength, both historical and forecasted
• Mobile functionality should mirror desktop functionality
• Features that enables users to identify and prioritize target markets and providers
• Defined setup and onboarding of users
• Dedicated advisor and support, with one-to-one interactions for customer service issues and quarterly discussions to review product updates and user issues

Functionality and services that would elevate a firm’s proposal include:
• Additional data modelling, additional datasets or tools that can segment or trend national or aggregated claims data
• Test or sandbox setup during the RFP and contract process.

Submissions should include information that details the

• Features of the PRM as noted above. It isn’t necessary to break out submission material into the bullet points above, but fully describe the core and differentiation features and integrations in a manner that fully describes the product.
• Pricing model including seat costs (UVA Health anticipates a need for 10 seats) or other costs and determinants based on the pricing model.
• Consumer data, third-party data or any other data or add on services not included in the pricing model above.
• Professional services model and pricing, as needed for setup and any other configuration or customization.
• Support services including the level of service in the proposed contract and any other levels or features outside of the proposed level.
• Security features or security level included in the contract, selected vendors will be required to satisfy a UVA Health security assessment prior to contract implementation.
• A list of at least three reference customers. References will not be contacted without prior vendor notification.
• Sample contract(s) and any additional terms required by vendor. If multiple contracts are required for services, clearly articulate the relationships and components governed by each contract.

Questions and Information
UVA Health will reach out to selected vendors to answer additional questions after the RFP deadline.

C. BASIS OF SELECTION
The Medical Center will evaluate proposals and, if a firm is to be selected, select the firm on the basis of:

1. The firm’s plan to assist the Medical Center to meet its goals and requirements as discussed in this RFP including its Section B: Scope of Goods and Services.
2. The firm’s relevant experience, qualifications and success in providing the goods and/or services outlined in this Request for Proposal.
3. The firm’s references from institutions of higher education, teaching hospitals, and clients who are comparable to the Medical Center.
4. The firm’s financial proposal.
5. The quality of the proposal, specifically, the provision, adequacy and completeness of your response.
6. The contractual terms that would govern the relationship between the Medical Center and the Selected Firm. The firm will be deemed to have fully accepted the Medical Center’s Contractual Provisions: http://www.medicalcenter.virginia.edu/scm/, unless specific modifications are requested in the firm’s written proposal, with an explanation as to why such modifications are required by the firm.
7. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or the firm’s plan for utilization of SWAM businesses.
8. Any other relevant factors as determined solely by the Medical Center.

D. CONTENTS OF PROPOSAL
Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content, and should be organized in the order in which the requirements are presented in the RFP. Firms should provide the following information:
1. A brief history of the firm and its experience, qualifications and success in providing the type of product requested.
2. A detailed description and the full specifications of the product proposed. Each firm should indicate in their proposal the firm’s ability to achieve / comply with each specification. In the event that the firm wishes to propose an alternate specification that, in any way, differs from the above specifications, the firm should detail their proposed change(s) and how the proposed change would compare to the listed specification. Proposals should be formatted in such a way to address each of the above specifications in a line-by-line process.
3. The estimated ship date/implementation date of the product from the time of the order (i.e., 10 wks after order)
4. Information on the warranty associated with the product you are proposing and any extended warranty (include the price) that might be available.
5. The firm’s proposed price / fee for providing the Goods and Services, to include shipping charges (the University’s shipping terms are FOB Destination), and description of invoicing process.
6. The firm’s capacity for accepting electronic payments through Electronic Data Interchange (EDI) or Automated Clearing House (ACH) and any additional discounts that may result from paying electronically.
7. At least three references where similar goods and/or services have been provided. Include the name of the firm / organization, the complete mailing address, and the name of the contact person and their telephone number.
8. The firm’s Small, Woman-owned and Minority-owned (SWAM) businesses status and/or how the firm intends to utilize SWAM firms in regards to this particular procurement.
9. An authorized representative of the responding Firm shall sign proposals. All information requested should be submitted; the Medical Center may reject proposals that are substantially incomplete or lack key information.
10. Each proposal and all additional documentation submitted should be contained in a single email where practical.
11. Ownership of all data, materials, and documentation prepared for the Medical Center pursuant to this RFP shall belong exclusively to the Medical Center. Once an award is announced, all proposals submitted in response to this RFP will be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by a firm as part of its proposal will not be subject to public disclosure under the Virginia Freedom of Information Act if the firm invokes the protections of Virginia Code Section 2.2-4342(F) in writing and follows its stated requirements prior to or upon submission of its proposal. A firm may not request that its entire proposal be treated as a trade secret or proprietary information. Nor may a firm request that it’s pricing be treated as a trade secret or proprietary information, or otherwise be deemed confidential. The Medical Center shall, upon receipt of any request under the Virginia Freedom of Information Act for materials that the Firm has identified as trade secrets or proprietary information in conformity with the requirements of Virginia Code Section 2.2-4342(F), notify the Firm that a request has been received, before responding to the request. Except as may be required by applicable law, the Medical Center shall not voluntarily disclose the designated trade secrets or proprietary information without prior written approval of the Firm.
12. Complete and return the information requested in Attachment 1, Firm Information. State point of contact information to include name, address, office telephone number, mobile telephone number, facsimile number and email address.
13. Provide the Medical Center with a written statement of any requested modifications to the Medical Center’s Contractual Provisions: http://www.medicalcenter.virginia.edu/scm/ pursuant to C.6 above. Failure to provide such a written statement will be deemed as full acceptance of the Medical Center’s Contractual Provisions without exception.

The Issuing Office for this Request for Proposal is:

U.S. Mail: All Other Deliverers:
University of Virginia Medical Center University of Virginia Medical Center
Medical Center Contracts and Procurement Medical Center Contracts and Procurement
P.O Box 800705 1300 Jefferson Park Avenue, Room #1951
Charlottesville, Virginia 22908 Charlottesville, Virginia 22903

Please note due to COVID all submissions are requested in email form to the contact Shelley Hawkins.
E. TERMS AND CONDITIONS

I. Awarded firms shall adhere to University and Medical Center Policies and procedures.

II. This solicitation and any subsequent award will be governed by:

   (a) The Selected Firm registering as a vendor with the University of Virginia Medical Center:
       http://www.healthsystem.virginia.edu/alive/scm/procurement.cfm
   (b) In addition to the Medical Center’s Contractual Provisions: http://www.medicalcenter.virginia.edu/scm/, the
       following Insurance provision will apply:

       Insurance. The Medical Center will not execute an Agreement or authorize the provision of goods and services
       until the Firm satisfies the insurance requirements of the Medical Center. In no event should the Selected Firm
       construe these minimum required limits to be their limit of liability to the Medical Center. The Medical Center
       reserves the right to approve any insurance proposed by the Selected Firm. The requirements are as follows:

       1. Automobile Liability insurance with a minimum combined single Limit of Liability for bodily injury and property
          damage of $750,000 per accident on all owned, hired, and non-owned vehicles operated by the Selected
          Firm’s employees;

       2. Commercial General Liability insurance with a minimum combined single Limit of Liability for bodily injury and
          property damage of $2 million per occurrence, to include premises/operations, products/completed
          operations, and contractual liability coverage and list the Medical Center as an additional insured, the
          proper name is: “The Commonwealth of Virginia, and the Rector and Visitors of the University of Virginia, its
          officers, employees and agents.”;

       3. Workers compensation coverage, (i) with Employer’s Liability coverage of at least $100,000 and (ii) which
          meets all statutory requirements.

       4. The Selected Firm will provide the Medical Center with a valid Certificate of Insurance evidencing all required
          coverage with its proposal, which shall remain in force throughout the terms of any resulting Agreement
          The Selected Firm shall only utilize insurers that hold at least an “A-“rating with A.M. Best Company. The
          Selected Firm shall notify the Medical Center in writing 30 days prior to the termination of any such
          insurance coverage for any reason whatsoever. The Selected Firm agrees to take no action that prohibits the
          utilization of this insurance or limits the liability of the Selected Firm for property damage or personal injury
          in conjunction with goods or services provided under this Agreement.

       5. For clinical services, the contractual medical malpractice insurance limit requirement is $2,000,000.

       6. For professional services, the Professional Errors & Omissions Liability insurance limit requirement is $1
          million per claim.
ATTACHMENT 1

FIRM INFORMATION

Full Legal Name:______________________________________________________
(Company Name as it appears with Federal Taxpayer ID Number)

Address:________________________________________________________________

Telephone Number:____________ Fax Number:__________________________

Web Address:________________________________________________________________

eMail Address:________________________________________________________________

DUNS Number:________________________________________________________________

SWAM Information:

Is your firm certified with the Commonwealth of Virginia’s Department of Minority Business Enterprises (DMBE):  YES____  NO____

Minority-Owned  YES____  NO____

Women-Owned  YES____  NO____

Small-Owmed  YES____  NO____

Your firm’s point of contact for this proposal:

Name:____________________________________________________________

Address:________________________________________________________________

Office Phone:________________________________________________________________

eMail:__________________________________________________________________________
Greetings:

The quality of service the University of Virginia is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational, health care and research missions. An important part of our procurement program involves our commitment to doing business with small, women- and minority-owned (SWaM) businesses. As one of our most important vendors, we look to you to help us achieve this objective.

We conduct substantial business with small firms. We have a particular institutional focus on developing long-term business relationships with minority-and women-owned businesses. We count on our majority firms to help us achieve our goal.

I seek your assistance in two areas. First, to the extent practical, I ask that you involve small, women-and minority-owned businesses in the delivery of services you provide to UVa. The office of Procurement and Supplier Diversity Services is ready to assist you in identifying qualified diverse business partners. Second, I seek your help in reporting your results through our quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

This effort is important to us. We depend on you in so many ways – this is another way that we can partner with your company to make things better.

Sincerely,

Colette Sheehy
Vice President for Management and Budget