



**COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT**

Contract No: UCPJMU7517

This contract entered into this 23rd day of June, 2026, by Professional Learning and Advocacy Consulting and Evaluating, LLC (PLACE), hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

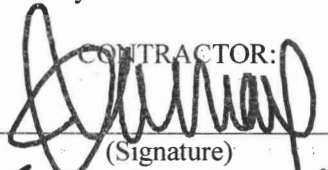
SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From July 6, 2026 through July 5, 2027 with four (4) one-year renewal options.

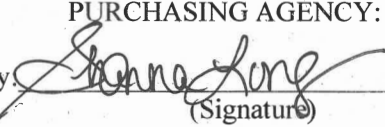
The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposal RFP SLD-1247 dated February 12, 2026
 - (a) The Statement of Needs;
 - (b) The General Terms and Conditions,
 - (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
 - (d) Addendum No. One – February 23, 2026
 - (e) Addendum No. Two – March 2, 2026
 - (f) Addendum No. Three- March 5, 2026
- (3) The Contractor's Proposal dated March 10, 2026 and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
 - (a) Negotiations Summary, dated June 17, 2026

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

By: 
(Signature)
Teri A. Marx
(Printed Name)

Title: Founder & CEO

PURCHASING AGENCY:
By: 
(Signature)
Shanna Long
(Printed Name)

Title: Lead Commodity Contract Officer

**RFP # SLD-1247, Grant Proposal Development and
Consulting Services
Negotiations Summary for PLACE, LLC
June 17, 2026**

1. Parties agree that items within this Negotiation Summary modify RFP# SLD-1247 and the Contractor's response to RFP# SLD-1247 and that this Negotiation Summary takes precedence in conflict.
2. Pricing Schedule: *Project-specific scopes may be priced on a time-and-materials or fixed-fee basis, as mutually agreed.*

Labor Category	Description of Services	Hourly Rate
Principal / Lead Strategist	Strategic leadership; research design oversight; logic model development; executive advising; evaluation oversight; stakeholder facilitation; QA review	\$250-300
Senior Researcher (On-site/Harrisonburg, as needed)	Leads qualitative and mixed-methods research; instrument development; field engagement; report drafting; supports implementation and applied coaching	\$225-300
Grants Specialist	Grant opportunity scanning; concept development; proposal drafting and editing; compliance review; budget narrative support	\$175-290
Methodologist	Advanced research design; sampling strategy; analytic plan development; quasi-experimental and mixed-methods integration; internal methodological QA	\$225-300
Project Manager	Develop work plan and timeline, manage project planning; milestone tracking; workflow mapping; risk monitoring; deliverable coordination; reporting	\$95-125
Data Analyst	Statistical analysis; qualitative coding; data visualization; dashboard development; technical appendices	\$100-175
Communications Lead	Coordinate, deliver and track internal and external messages; manage knowledge translation; draft executive summaries, practitioner-facing materials, briefing templates; develop dissemination strategy as needed.	\$95-125
Strategic Planner	Facilitates stakeholder discussions; leads strategy sprints; subject matter expertise to guide interdisciplinary decisions	\$150-200
Other Support Staff	Junior researchers; research assistants/data collectors; administrative support personnel; interpreters/translators; graphic designers; facilitation specialists	\$35-125

**RFP # SLD-1247, Grant Proposal Development and
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Negotiations Summary for PLACE, LLC
June 17, 2026**

3. Contractor has disclosed all potential fees. Additional charges will not be accepted.
4. Contractor hereby rescinds confidentiality of its entire proposal dated March 10, 2026 and all subsequent negotiations with the exception of specific sections of the proposal that have been redacted and mutually agreed upon by the University.
5. Any projects or engagements shall be by mutually executed Scopes of Work (SOWs) pursuant to the terms and conditions and hourly rates/pricing as outlined in the above pricing schedule.

The scope of work shall include number of hours to be worked, contracted hourly rates, deliverables to be provided, timelines, and total cost. The Purchasing Agency shall issue purchase orders in accordance with the project scope of work that shall authorize the offeror to proceed with work. There shall be no work permitted under any resulting contract without an agency issued purchase order.

6. Any scope of work agreed upon under the performance of this contract may be terminated by the university, in its sole discretion, for any reason or no reason at all, upon providing 30 days' written notice to the contractor. In the event of such termination, the terminating party shall not be liable to the other party for any damages, losses, or expenses whatsoever, including but not limited to consequential or incidental damages. Upon termination for convenience, the parties shall negotiate in good faith to determine a fair and reasonable compensation for work performed or expenses incurred up to the effective date of termination.
7. All labor rates/pricing shall remain unchanged for the duration of the contract. Price increases may be negotiated only at the time of renewal and shall be in accordance with the other services category of the CPI-W section of the Consumer Price Index.
8. Payment Terms – As an agency of the Commonwealth of Virginia, James Madison University makes payment in accordance with the Code of Virginia, §2.2-4347 through 2.2-4354, Prompt Payment.
9. Billable hours are for actual work hours on authorized projects/tasks rounded to the half hour. Billable hours shall not include travel time.
10. Invoicing: invoicing shall be mutually agreed upon in advance by the parties and explicitly set forth in the scope of work for each individual project or engagement (*e.g. frequency, milestones, etc.*) and contractor will submit all invoices in accordance with the scope of work.
11. Travel Expenses: James Madison University is an agency of the Commonwealth of Virginia and as such, Contractors billing for travel related expenses must invoice in accordance with the U. S. General Services Administration (GSA) for lodging, meals and incidental expenses at the time of travel, which can be referenced at: <http://www.jmu.edu/finprocedures/4000/4215mie.shtml> .

Transportation for air travel and car rental will be paid at cost with Contractor providing a documented receipt to the University. Contractor shall book air travel and car rental to ensure expenses remain economical. Air fare shall be reimbursed for coach/standard with no upgrades and car rental shall be reimbursed for standard with no upgrades.

**RFP # SLD-1247, Grant Proposal Development and
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12. All projects and engagements shall be provided on an as-needed basis. JMU makes no guarantee or commitment regarding the volume of work, number of projects, or amount of spend.
13. The purchasing agency shall own all right, title, and interest in and to all documentation, deliverables, work product, and intellectual property created or developed by the Contractor specifically for the agency under any resulting contract. The format and repository for delivery shall be mutually agreed upon. Contractor retains all ownership of all pre-existing intellectual property, tools, software, methodologies, and materials it brings or uses in performing the work under the contract.
14. No other terms and conditions on Contractor forms shall govern over any terms of this contract unless mutually accepted by a signature authority.
15. Contractor agrees that all exceptions taken within their initial response to RFP SLD-1247 that are not specifically addressed within this negotiation summary are null and void.

ORIGINAL

REQUEST FOR PROPOSAL
RFP# SLD-1247

Issue Date: February 12, 2026
Title: Grant Proposal Development and Consulting Services
Issuing Agency: Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until 2:00 PM on March 11, 2026 for Furnishing The Services Described Herein. (See Special Terms & Conditions "D. Late Proposals")

SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, SUBMITTED IN eVA, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.

All Inquiries For Information And Clarification Should Be Directed To: Shanna Devers, Lead Commodity Contract Officer, Procurement Services, deverssl@jmu.edu; 540-568-3131; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

PLACE, LLC

6308 Swan Landing Ct.

Burke, VA 22015

By:


(Signature)

Name:

Teri Marx

(Please Print)

Date:

3/10/26

Title:

Founder and CEO

Web Address:

placellc.org

Phone:

630-605-8637

Email:

teri.marx@placellc.org

Fax #:

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 ☒ #2 ☒ #3 ☒ #4 ☐ #5 ☐ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☒ YES; ☐ NO; IF YES ⇒ ☒ SMALL; ☒ WOMAN; ☐ MINORITY IF MINORITY: ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micr

Note: This public body does not discriminate against faith-based organizations in accordance with the Code of Virginia, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

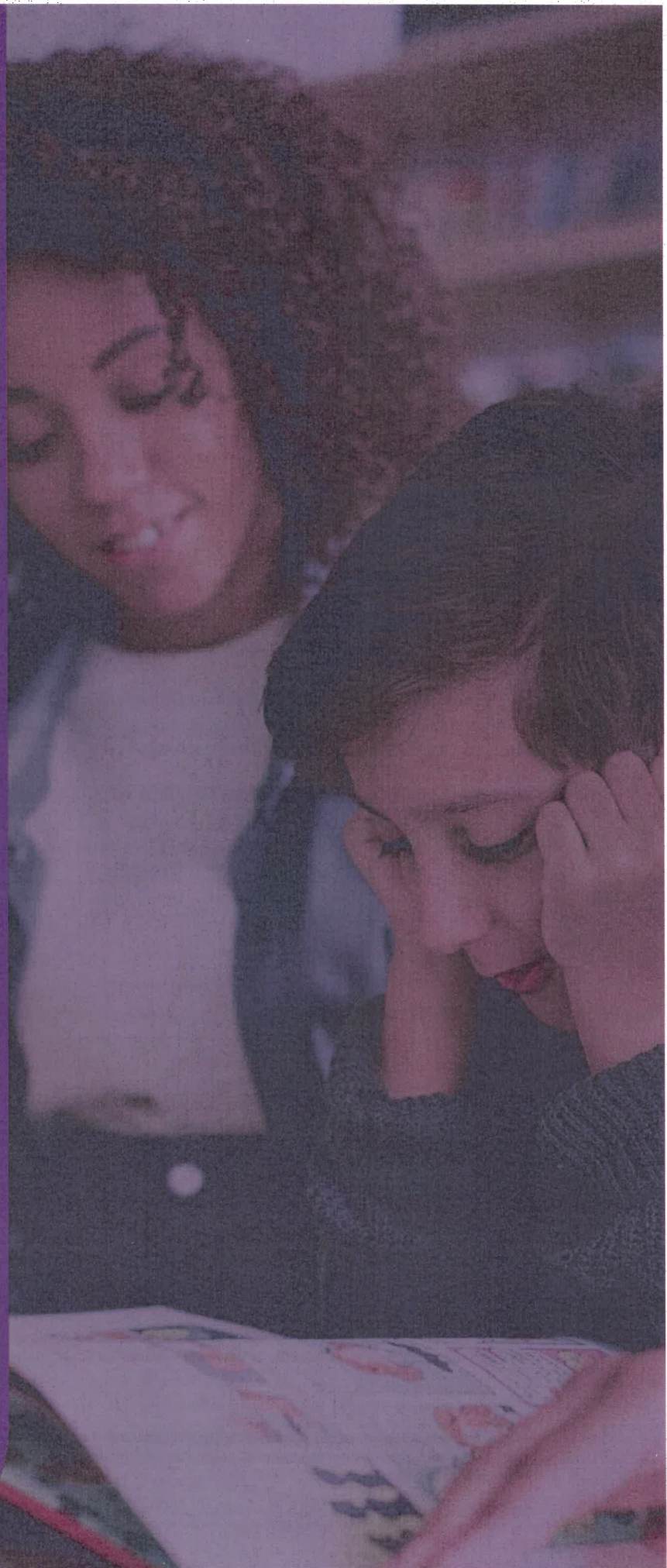


PLACE
LLC

PROPOSAL RESPONSE

JMU - Grant Proposal Development and Consulting Services

RFP# SLD-1247



Proposal Response - JMU Center for Advancement Research in Education

In response to: RFP# SLD-1247

Submitting: March 10, 2026

Bid Title: Grant Proposal Development and Consulting Services

Submitted by:

Sender	PLACE, LLC
Contact	Teri Marx
Address	6308 Swan Landing Ct., Burke, VA 22015
Phone	630-605-8637
Email:	teri.marx@placellc.org

Submitted to:

Recipient:	James Madison University - Office of Procurement Services
Contact	Procurement Services MSC 5720
Address	752 Ott Street, Wine Price Building
	First Floor, Suite 1023
	Harrisonburg, VA 22807

This proposal includes proprietary and business confidential data and shall not be disclosed outside the Commonwealth of Virginia, James Madison University office of Procurement Services (JMU Procurement Services) and shall not be duplicated, used, or disclosed—in whole or in part—for any purpose other than to evaluate this proposal. However, if an agreement is awarded to this offeror as a result of—or in connection with—the submission of these data, JMU Procurement Services shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting agreement. This restriction does not limit the JMU Procurement Services's right to use the information contained in these data if they are obtained from another source without restriction.



PLACE, LLC

Professional Learning and Advocacy Consulting and Evaluating, LLC

c/o Teri Marx

TRANSMITTAL LETTER

On behalf of PLACE, LLC, I am pleased to submit our proposal in response to RFP# SLD-1247: Grant Proposal Development and Consulting Services. PLACE, LLC is a northern Virginia-based, woman-owned micro-small business (SWaM Certificate #: 825614; valid through 2028) dedicated to advancing equitable, high-quality educational outcomes through strategic planning, research, technical assistance, and grant development. For this effort, PLACE is partnering with Third Sight, LLC, a woman-owned small business specializing in disability inclusion, leadership development, and research to improve outcomes for people of all ages.

Our proposal reflects both our deep commitment to JMU CARE's mission and our extensive experience supporting higher education institutions in building research capacity, securing funding, and translating evidence into practice. Led by Dr. Teri Marx, our team includes collaborators from Third Sight, LLC and an intentionally interdisciplinary network of grant writers, researchers, evaluators, and policy experts with deep expertise in P-20 educational systems, early childhood development, and workforce development.

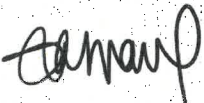
We propose a partnership model built around three core priorities that align directly with JMU CARE's stated needs: grant development support to diversify and expand the Center's funding portfolio; capacity-building to grow and sustain the faculty affiliate network; and research and technical assistance to translate CARE's interdisciplinary findings into actionable, scalable practices. Our approach emphasizes collaborative, iterative processes—through opportunity scanning, fit assessment, timeline back-planning, and rigorous quality assurance—to ensure every proposal reflects JMU CARE's distinctive research identity and positions the Center competitively in an increasingly complex funding landscape.

To support your review, we have prepared a [REDACTED] to accompany this submission. The appendix contains subfolders with the following information:

- Appendix 1: Required Attachments
- Appendix 2: Resumes
- Appendix 3: Past Cross-Institutional and International Partnerships (B3)
- Appendix 4: Sample Facilitation Strategies (B7)
- Appendix 5: Sample Curricula and Materials (B8)
- Appendix 6: Exemplars of Past Work (B17)

The link allows for "view only" access and will expire in 45 days. We appreciate the opportunity to partner with JMU CARE to advance research and evaluation capacity, strengthen existing grant development, and engage in interdisciplinary strategic planning. Should you require additional information or access to the digital materials, please contact me directly at teri.marx@placellc.org or 630-605-8637.

Sincerely,



Teri Marx, Ph.D.
Founder and Principal, PLACE, LLC



TABLE OF CONTENTS

RFP Reference	Proposal Section	Page	Proposal Ref.
—	Cover Sheet / Signed RFP Cover Page	i	—
—	Transmittal Letter	ii	—
—	Introduction	3	—
IV.A	Understanding of JMU CARE's Request	4	A
IV.B Statement of Needs — Detailed Responses			
IV.B.1	B1. Capacity to Deliver Services	5	B1
IV.B.2	B2. Prior Work with Higher Education Institutions	6-9	B2
IV.B.3	B3. Cross-Institutional or International Partnerships	9-10	B3
IV.B.4	B4. Proximity to Harrisonburg, VA	11	B4
IV.B.5	B5. Opportunity Scanning, Fit Assessment, Timeline Back-Planning, and Priority Integration	11-15	B5
IV.B.6	B6. Grant Drafting, Compliance, and Submission Processes	15-18	B6
IV.B.7	B7. Facilitation Techniques that Balance Critique and Capacity-Building	18-21	B7
IV.B.8	B8. Strengthening Research Methods, Project Management, and Knowledge Systems	21-23	B8
IV.B.9	B9. Research Design, Logic Models, Instruments, Sampling, IRB Readiness, Data Collection & Analysis, and Reporting Methods	24-28	B9
IV.B.10	B10. Accessibility and Inclusive Design	28-30	B10
IV.B.11	B11. Time Estimation, JMU Inputs, and Assumptions	30-32	B11
IV.B.12	B12. Schedule Development, Milestone Tracking, and Risk Management	32-34	B12
IV.B.13	B13. Status Meetings, Progress Summaries, and Documentation	34-36	B13
IV.B.14	B14. Key Personnel	36-41	B14
IV.B.15	B15. Contingency Coverage Model	42-43	B15
IV.B.16	B16. Ongoing Training for Project Staff	43	B16
IV.B.17	B17. Exemplars	44	B17
IV.B.18	B18. Editorial, Technical, Accessibility, and Methodological QA	44-46	B18
IV.B.19	B19. Artifact Organizing and Archiving for Sustainability and Handoff	46-47	B19
IV.B.20	B20. Data Management Plans	47	B20
IV.B.21	B21. IRB Processes and Responsible Conduct of Research Training	48-49	B21
IV.B.22	B22. Hosted Solutions and Storage	49	B22



IV.B.23	B23. Risk Identification and Mitigation Strategies	49-51	B23
IV.B.24	B24. Project Start-Up and Wind-Down	51-52	B24
IV.B.25	B25. Identifying, Escalating, and Resolving Issues	52-53	B25
IV.B.26	B26. Comprehensive Pricing	54-55	B26
—	Conclusion	55	—

Additional Requirements

VASCUPP Sales (past 12 months)	Institution	Amount	VASCUPP Zone
	University of VA	\$19,917.50	9



TECHNICAL PROPOSAL

Introduction

Established in 2022, Professional Learning and Advocacy Consulting and Evaluating, LLC (PLACE) is a northern Virginia-based, woman-owned, micro-small business (SWaM Certificate #: 825614; valid through 2028) focused on strategic planning, research, and evaluation aimed at improving educational outcomes for educators, students, and their families. For this effort, PLACE is partnering with Third Sight, LLC (Third Sight), a woman-owned small business that contributes to and creates conditions for success in work and life for people with disabilities. Third Sight makes a difference in three primary areas: leadership development and strategic planning, disability inclusion in the workforce, and research to understand strategies in workforce development to improve outcomes for people of all ages. We are intentional about our commitments to ensure an alignment between our work and our personal and professional values. This provides assurance to clients that we will deliver high-quality services grounded in research, practice, and policy.

We educate through evidence, advocate through empowerment, and evaluate through engagement.

PLACE and Third Sight leverage an extensive network of grant writers, quantitative and qualitative researchers, program evaluators, strategists, data analysts, and policy experts with deep subject matter expertise in P-20 educational systems, youth and community development, adult education and literacy, and workforce development (see Section B.14 and resumes in the [REDACTED]). Collectively, we comprise the PLACE Team. The PLACE Team is intentionally interdisciplinary by design, bringing a mix of skills and talent that supports the work that James Madison University (JMU) CARE is seeking. We bring decades of experience leading research studies and utilization-focused program evaluations, technical assistance and training, and community-engaged action research to advance real-world outcomes.

Statement of Needs

JMU CARE seeks a collaborative partner that can strengthen its capacity to advance interdisciplinary, evidence-based research and practice related to early childhood development and education across the lifespan. The PLACE Team is that partner. We are experienced researchers and strategic thought partners with a history of success in strengthening organizational capacity to investigate complex educational challenges, develop and test interventions, and disseminate findings—all while meaningfully engaging a variety of stakeholders. Our proposal demonstrates our approach to supporting proposal development, strategic thought partnership, technical assistance, interdisciplinary research support, and utilization-focused evaluation.



IV.A. Understanding of JMU CARE's Request

JMU CARE was established to address the urgent, evidence-based needs of children and educators who serve them, and its track record of funded work reflects a center that has delivered meaningfully on that promise. JMU CARE has steadily grown from an early childhood research center into a platform with reach across the lifespan. This growth surfaces a core challenge for CARE. As this portfolio expands from early childhood into K-12, workforce preparation, and educator professional development, the Center needs to articulate a coherent, compelling research identity that funders, policymakers, and university stakeholders will recognize and invest in.

The PLACE Team understands that JMU CARE is seeking to expand its research and activities on a global scale, all while facing a funding environment that is both shrinking and becoming more competitive. Current grants at the Center are reaching the end of their funding cycle. And the federal research funding infrastructure that supports education research has been disrupted. To continue its strategic growth and expansion, JMU CARE will need:

1. Grant development support to pursue the next generation of funding across a more diverse funder landscape.
2. Increased capacity to grow and sustain the faculty affiliate network and educator workforce.
3. Research and technical assistance capabilities that can translate CARE's interdisciplinary findings into actionable and scalable practices in Virginia and beyond.

Our team offers a reliable, experienced, and purpose-driven partnership to help JMU CARE enhance its core implementation and evaluation work, overcome capacity challenges, and increase its funding support. We bring extensive experience with grant proposal development and relationships in philanthropy that we can leverage in partnership with JMU CARE. Our team has provided technical assistance to leaders at all levels of nonprofit organizations, government agencies, associations, and higher education institutions—from on-the-ground community practitioners and executive decision-makers. We have led interdisciplinary research studies that have influenced field-wide policy and practice and community-engaged evaluations that have helped to build the link between evidence and practice.

The PLACE Team looks forward to partnering with JMU CARE by bringing our aligned experience to support comprehensive, evidence-based approaches that advance the understanding and support of holistic development across the lifespan. In the following sections we describe our approach to addressing each of the needs identified in the RFP. In collaboration with JMU CARE, we will support the capacity of faculty and staff to achieve their objectives.



IV.B. Detailed Responses to JMU CARE Priorities

The following section provides detailed responses to each requirement outlined in the RFP. Our responses describe the capacity, expertise, processes, and systems we bring to support JMU CARE across grant development, strategic partnership, research support, and utilization-focused evaluation. For each requirement, we outline the relevant experience of our team, our approach to collaboration and project implementation, and the structures we use to ensure high-quality, responsive, and sustainable deliverables aligned with JMU CARE's priorities.

IV.B.1. Capacity to Deliver Services

RFP Requirement: "Describe your firm's capacity to deliver the service areas as indicated above. Include team size, core roles, and availability during peak periods."

PLACE is a nimble and highly responsive small business that offers clients the personalized attention and flexibility often lacking in larger organizations. Led by Dr. Teri Marx, PLACE will dedicate focused time and expertise to each aspect of the project, ensuring that all proposed activities and deliverables are executed with the depth, precision, and care necessary to achieve desired results. As noted in the introduction, PLACE and Third Sight will collaboratively partner on this effort, with Dr. Marx serving as primary point of contact. The PLACE Team includes four core staff to lead projects and major tasks, as well as a large cadre of professionals who provide a range of skills and expertise to support JMU CARE (see Section B14 and [REDACTED]). We will learn about specific needs and identify the tools and talent from among the PLACE Team that will best support each project.

The PLACE Team will serve as an extension of JMU CARE. We are your partners and collaborators, strategically positioned to build your capacity, especially during peak periods (like the end of the semester!).

Operationally, PLACE maintains a secure and efficient digital infrastructure to support seamless project execution and collaboration. The team uses Microsoft Office 365 and Microsoft Teams to enable real-time communication, shared document editing, and transparent task management. All project data are securely stored on SharePoint Online, housed within a password-protected, private network at PLACE headquarters, ensuring data integrity and client confidentiality. Further, we are fully equipped with the necessary software to perform various streams of work, as well as to produce 508-compliant and fully accessible documents, presentations, and data visualizations. We also leverage QuickBooks Online for streamlined invoicing and budget tracking, allowing for timely financial reporting in alignment with client (and grant funder) fiscal requirements. Together, these systems and structures enable PLACE to deliver professional and timely work products—while maintaining the agility to adapt quickly to evolving project needs.



IV.B.2. Prior Work with Higher Education Institutions

RFP Requirement: "Describe any prior work with other higher education institutions, highlighting strategic planning, technical assistance, or evaluation engagements."

The PLACE Team has worked directly with higher education institutions and with adjacent systems in P-12 education, youth development, workforce, disability, and family and community engagement. Examples of how our work has supported strategic planning, technical assistance, and evaluation are described below.

IV.B.2.1. Strategic Planning

The PLACE Team employs structured strategic planning methods that combine environmental/opportunity scanning, stakeholder-driven strategy sprints, and data-informed prioritization to help clients identify opportunities, align initiatives with institutional priorities, and translate strategy into actionable implementation plans.

Dr. Marx's past work with the Collaboration for Effective Educator Development, Accountability, and Reform (CEEDAR) Center exemplifies our experience facilitating strategic planning with higher education institutions. With one state, she led **inter-institutional strategic planning sessions with Deans, higher education faculty, and school district leaders** centered on aligning educator preparation programs with state- and local-level priorities. These sessions incorporated mini-trainings, stakeholder feedback sessions, educator preparation and retention data analyses, and goal-setting to inform next steps. Dr. Marx served as a trusted partner, as evidenced in this statement from a [CEEDAR state spotlight](#) "...through the leadership of Dr. Teri Marx, the CEEDAR state lead, and by leveraging opportunities to meet at the CEEDAR Cross-State Convening, they overcame these challenges and kept the work on track." With another state, she similarly engaged faculty from across institutions to help them strengthen the alignment between educator preparation programs and state-level efforts related to a multi-tiered system of supports.

Other PLACE Team members **partnered with the American Council on Education (ACE)** to present a 2-part ,4-hour [workshop](#) to college and university leaders to identify strategies and plan for increased inclusion on campus using the technical assistance guide referenced in Section B2.2.

B.2.2. Technical Assistance

The PLACE Team delivers technical assistance through a collaborative, capacity-building approach that combines expert guidance, practical tools, and responsive support tailored to each partner's context and goals. Our approach emphasizes strengthening internal systems and skills so organizations can sustain and expand their work beyond the duration of the engagement. Specific examples of PLACE Team members' technical assistance to higher education institutions include:





Published and co-authored [Higher Education's Next Great Challenge: Ensuring Full Inclusion for Students with Disabilities](#). This comprehensive guide provides a framework for ensuring full inclusion on university campuses and in classrooms, addressing the needs and responsibilities of students, faculty, and administration. We also offered training and action guidance to **more than 50 university staff** in the U.S. including Puerto Rico. Our team also co-wrote an evidence-based [blog post](#) to highlight strategies for inclusion and universities that are taking action to improve student experiences on campus.



Served on the advisory committee for **Ohio State University's TBI Model System's (OSU TBI MS)** [TBI Identification Method](#) training for medical providers and students to guide the development and ensure information was effectively communicated to end-users.



Translated research from the **University of Pittsburgh Medical Center's (UPMC)** [Wheelchair Training](#) Research Project into material used to develop their online training tools for consumers and conducted an evaluation of the university's research initiative.

Designed and implemented communications and networking training for graduate level students in the **Northwestern University's School of Education and Social Policy (SESP)**, which houses the Dual Master's Degree Program in Applied Economics (a collaboration with the Chinese University of Hong Kong). Our staff provide training annually to graduate students who are preparing to exit the program and enter the labor force. Students learn how to network within a U.S. context, explore communication skills as they develop professional relationships, and explore their communication styles.

Led the training and dissemination projects within a multi-project [Rehabilitation Engineering Research Center on Hearing Assistive Technology](#) funded through a subcontract with **Gallaudet University**. This included developing and implementing focus groups with consumers and producers of hearing assistive technology, and design and implementation of a train-the-trainer framework.



Provided technical assistance to **Northwestern University** in their [Special Olympics International Unified Champion Schools Evaluation](#), to support parent and family engagement for six country programs in a multi-year international evaluation, working within Special Olympics' global research and evaluation team.



B.2.3. Research and Evaluation

The PLACE Team has extensive experience conducting research and evaluation *in partnership with and focused on* higher education institutions and systems. We combine methodological rigor with a deep understanding of higher education systems, enabling us to produce actionable findings that guide program improvement, policy development, and strategic decision-making. The PLACE Team has applied this approach across a range of higher education research and evaluation engagements.

The PLACE Team currently serves as the external evaluator for three *Stepping Up Technology* grants housed at the **University of Virginia Curry School of Education and Human Development** (one of which is in collaboration with **UT Health Houston**) funded by the U.S. Department of Education's Office of Special Education Programs (OSEP). As the external evaluator, we are responsible for developing and updating the logic model and evaluation plan, mixed-methods data collection, data analysis and visualization, and preparing summaries for federal reporting. We also partner with **Northwestern University** to evaluate the [*Real Pay for Real Jobs*](#) demonstration project led by the Virginia Department for Aging and Rehabilitative Services (DARS). The federally funded grant focuses on competitive integrated employment for people with disabilities in subminimum wage jobs or sheltered work settings. Specifically, our role is to lead the implementation study, which is a qualitative evaluation of the demonstration project.

Other research and evaluation engagements among PLACE Team members include:

- Led the [*Open Educational Resources to Increase Teaching and Learning of STEM Subjects in Adult Education*](#) project, funded by the U.S. Department of Education, which included evaluating more than 120 OERs for adult learners seeking postsecondary pathways.
- Collaborated on the research report [*Credit for Prior Learning: Charting Institutional Practice for Sustainability*](#), which examines institutional approaches to developing and sustaining comprehensive credit for prior learning (CPL) policy and practice. The study synthesized perspectives from seven participating colleges and universities, with findings revealing how institutions align academic policy, administrative processes, and stakeholder engagement to support long-term sustainability of CPL initiatives.
- Led the research and development of *The Architecture of Innovation: System-Level Course Redesign* in Tennessee, which analyzed the Tennessee Board of Regents' system-wide course redesign initiative and highlights how large-scale curricular innovation requires coordinated leadership, effective systems, and sustained collaboration across institutional and state levels.
- Led the research and development of *Looking Back & Looking Forward: A Review of the ACE Fellows Program*, an examination of one of the nation's longest-running higher education leadership development programs; the report assessed program impact and future direction, emphasizing leadership as a collective practice essential to addressing complex institutional challenges.
- Supported a program review for the American Association of State Colleges and Universities (AASCU) to examine the ways in which AASCU's *Student Success Equity*



Intensive has guided participating institutions through the journey of institutional transformation for equitable student success. We interviewed over twenty-two stakeholders across 7 participating institutions, including coordinating with institutional teams, interviewing stakeholders, and conducting a preliminary thematic analysis of findings.

Lastly, the PLACE team has led campus-community partnership development, student research, social action, and changemaking initiatives in higher education settings such as:

- Provided technical assistance to students and staff for the Honey W. Nashman Center for Civic Engagement and Public Service at **George Washington University** on the development of community-engaged curriculum and focused service projects.
- Led a semester-long learning experience for students through the Eisenhower Institute at Gettysburg College focused on education policy, which resulted in students writing a report on ESSER investments to advance student learning across the state of Maryland. Invited to return to **Gettysburg College** to lead a year-long learning experience focused on the intersection of housing, health and education.
- Led both co-curricular and academic service-learning courses and student leadership opportunities at two California universities: **Notre Dame de Namur University** in Belmont, CA and **San Francisco State University**.

IV.B.3. Cross-Institutional or International Partnerships

RFP Requirement: "Summarize your firm's experience forming and sustaining cross-institutional or international partnerships."

We understand cross-institutional and international partnerships to involve intentional collaboration among organizations with distinct missions, governance structures, and areas of expertise to address complex challenges that cannot be solved by a single institution alone. Successful partnerships require more than simply assembling collaborators; they depend on clearly defined roles, aligned goals, transparent decision-making structures, and mechanisms for sustained communication and coordination across institutions. In higher education contexts, this often includes aligning academic priorities, research agendas, and operational processes across universities, nonprofit organizations, government agencies, and community partners.

The PLACE Team approaches cross-institutional and international partnerships by first identifying complementary expertise and shared interests among potential collaborators, then facilitating early conversations to establish common objectives, governance structures, and expectations for participation. We support partners in clarifying roles, developing shared project frameworks, and creating structures for ongoing coordination, including communication protocols, joint work plans, and decision-making processes. Throughout proposal development and project implementation, we emphasize building trust, ensuring equitable participation, and designing partnership structures that support both effective collaboration and long-term sustainability.



Cross-institutional partnership is not incidental to our work. Many of our major projects involve multiple funders, implementation partners, and stakeholder groups working across organizational and geographic boundaries.

Building on this approach, the PLACE Team has cultivated relationships with a broad and diverse network of experts across local, national, and global partners from universities, funder agencies, community-based organizations, and advocacy groups. These relationships enable us to identify and convene collaborators whose expertise aligns with project goals and funding priorities. Below, we provide two examples of partnerships and networks our team has helped lead and develop to illustrate the range of cross-institutional collaboration and support we can bring to JMU CARE (additional examples in [REDACTED])



PLACE Team members from Third Sight served as co-coordinators of the **DC Education Policy Fellowship Program (EPFP)** housed at the Institute for Educational Leadership. They designed a nine-month professional development program that provides emerging leaders—from education research, policy, and practitioners; workforce; and disability sectors—with the knowledge, networks and leadership skills to impact a broad range of education and public policy issues from an equity perspective. At the national level, they partnered with state-based EPFP sites across the country and supported the national EPFP office in designing a program evaluation framework, developing survey and documentation protocols, and refining the program's logic model. At the regional level, they coordinated cross-sector learning events and policy engagement in Washington, D.C. and Maryland, bringing together state agency leaders, public policy organizations, state and local legislators, and community-based organizations. **To sustain cross-institutional relationships** beyond the program year, they established LinkedIn-based cohort networks that enabled Fellows to maintain connections, share resources, and continue collaboration.



Through the **Campaign for Grade Level Reading (CGL)** our team provided technical assistance to local, community-based, and place-based collective impact efforts where multiple entities in communities' education ecosystems come together to determine how they can collectively and purposefully address the issue of the low rate of third grade reading achievement. These local institutional partnerships have generated evidence of impact in jurisdictions across the country. In addition, in the past seven years, our team has planned and facilitated CGLR's weekly webinars that bring together top researchers, policy makers and thought leaders in discussions of the most recent and relevant research and developments impacting early school success, which has led to our deep experience cultivating institutional partnerships where missions are aligned and key perspectives are merged to influence the field and enable practitioners to advance their work.



IV.B.4. Proximity to Harrisonburg, VA

RFP Requirement: "Demonstrate your ability to provide a senior researcher based or regularly available in the Harrisonburg, VA area to support on-site data collection."

The PLACE Team for this effort is strategically constructed to ensure direct onsite support at JMU CARE in Harrisonburg, Virginia on a regular and as-needed basis. **All proposed key personnel are within driving distance of Harrisonburg** (see B.14 for more detail about key personnel). Specifically, proposed Principal/Lead Strategist, Dr. Teri Marx, resides within a short distance from Harrisonburg, Virginia (1.5 hours) and proposed Senior Researcher, Dr. Jennifer Crandall, is within a 2-hour drive. Dr. Marx is a mixed-methods researcher and utilization-focused program evaluator with deep content expertise across multiple facets of the P-20 continuum. Dr. Crandall is a qualitative researcher experienced in all aspects of data collection and analysis. In addition, Ms. Shaewitz, proposed Grants Specialist, is an expert in knowledge translation and leads implementation evaluation projects across the country; she is located 2.5 hours from Harrisonburg. In addition to key personnel, the PLACE Team includes additional contractors, also within driving distance, who can support onsite data collection.

We are readily available for in-person meetings, events, and project activities. These project activities may include data collection, in-person facilitated training or workshops, in-person strategy meetings, content review and feedback sessions, and other activities as determined in collaboration with the JMU project officer.

IV.B.5. Opportunity Scanning, Fit Assessment, Timeline Back-Planning, and Priority Integration

RFP Requirement: "Explain your approach to opportunity scanning, fit assessment, timeline back-planning, and integration with JMU CARE/COE priorities."

The PLACE team brings deep expertise in the entire grant-funding cycle across an array of funders—global, federal, state, local, foundation, corporate, and independent. Establishing a strong business development approach requires a long-term strategy that aligns with the organization's mission. JMU CARE's objectives clearly outline the outcomes the university wants to achieve. While financial resources and support should continue to align with those objectives, it must also reflect the changing and challenging funding environment we are currently in. Given these externalities, JMU will need to ensure that its funding approach is both strategic and flexible. This is important not only to support organizational objectives, but also to increase their win rate which will reduce pressure on staff and faculty who search for, apply for, and implement new projects.



We understand the grant-funding cycle, because we depend on it ourselves. Further, PLACE Team members have interned within the U.S. Department of Education or served as grant reviewers across numerous agencies, giving us keen insight into what matters most to funders.



IV.B.5.1. Opportunity Scanning

Our approach to opportunity scanning requires a combination of ongoing research, opportunity tracking, and relationship-driven intelligence gathering. Key to our approach is connecting to an array of funding options and sustaining relationships with both funders and partners. For example, our team maintains direct relationships with staff across federal, state, and local agencies, and we seek out partnerships with other universities and organizations with shared missions. We understand that our partners may be our competitors in the future, so we strive to maintain positive professional relationships to encourage information sharing over the long-term.

Specifically, we monitor Federal opportunities through [Grants.gov](https://www.grants.gov) and agency-specific forecast pages including the U.S. Department of Education, National Institutes of Health (NIH), Department of Housing and Urban Development (HUD), Administration for Community Living (ACL/DHHS), and the National Science Foundation (NSF). Within these pages we search for funding opportunities that align with our mission. Our experience in searching for grants reflects our familiarity with these agencies gained through projects we have won and led as well as our experience serving on review panels.

In 2024, we led a grant proposal with the New Hampshire Department of Education, resulting in the successful award of a \$3,526,640 State Personnel Development Grant.

In addition, we monitor state and local government grant portals (e.g., Bonfire Hub, EUNA Solutions, JAGGAER, eVA, IMPACS, EMMA), review agency reports, and track legislative developments to identify emerging funding priorities. Our team also subscribes to agency listservs, professional networks, and funding alert services such as Candid to stay informed about opportunities. Using Customer Relationship Management (CRM) systems and customized tracking tools, we monitor opportunity alignment, deadlines, and proposal requirements, while regularly reviewing our business development strategy to identify gaps and emerging areas for growth. Established relationships with foundations and funders further strengthen our ability to identify and pursue relevant opportunities.

IV.B.5.2. Fit Assessment

There are myriad existing tools to determine the fit of a grant opportunity—including AI-powered tools and “Bid/No-Bid” matrices or frameworks. These tools share common elements, and support organizations with determining if an opportunity:

1. is mission-aligned.
2. benefits the organization.
3. benefits the population to be studied or served.
4. is reasonable/feasible.
5. is likely to result in funding (i.e., probability of award).
6. reflects the real-world staffing mix and availability of personnel.



7. considers the institutional capacity, budget, and timeline.

The JMU CARE researchers would benefit from a review of these tools and a discussion to create a JMU CARE-specific grant fit assessment tool and scoring rubric. The PLACE Team will work with the JMU CARE staff to develop a tool that works for their context. With a set of agreed upon criteria and a bid/no-bid rating scale in place, we will help formalize a decision-making process about whether a bid is worth pursuing even if it does not meet all the criteria. For example, faculty may choose to pursue a small project to establish a relationship with a new agency, or decide not to pursue a high-value opportunity if the time, effort, and cost required to prepare the proposal outweigh the likelihood of success.

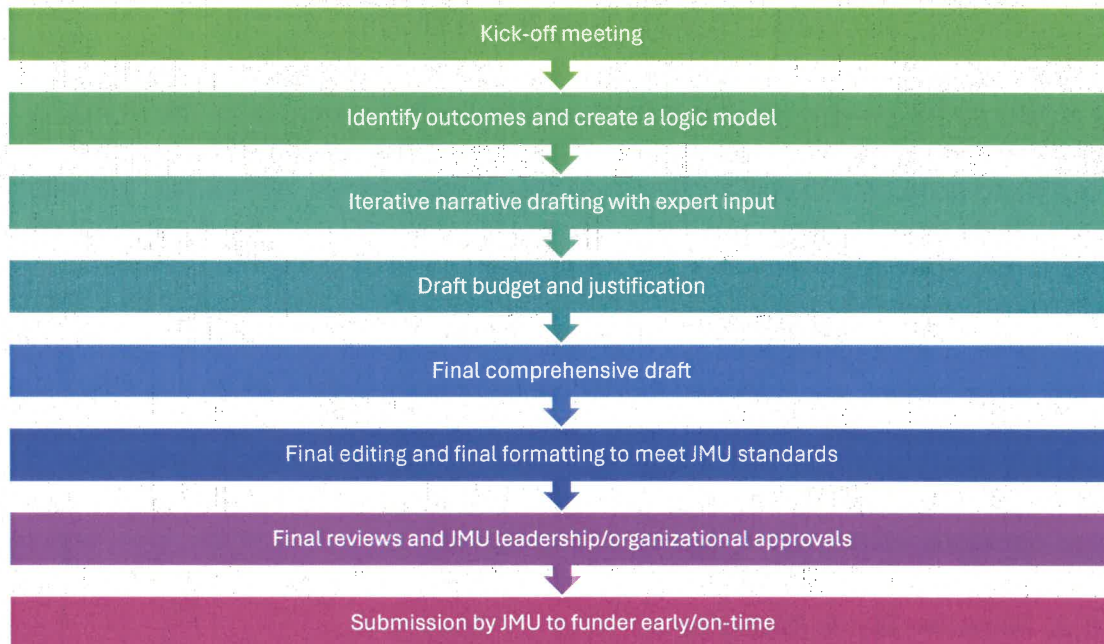
Too many organizations are stretched thin by constant grant writing which can affect staff morale, cause burnout, and shift the priority of the organization to centering funding over mission. By collaborating with the PLACE Team, bid decisions will become strategic, making it possible for JMU CARE to be well-funded, all while maintaining a balance for staff. Strategic decisions will help grow the research program.

IV.B.5.3. Timeline Back-Planning

Backward planning or “timeline back-planning” is a common approach to identifying the end goal and due date for an operation and then planning backwards to the current date. This is an ideal way to plan proposals and grant opportunities. It allows the entire team to understand the process, the flow of information, who is responsible for which pieces by specific dates/times, and ensures that multiple activities can be completed at the same time. For example, budgeting and technical proposals may develop in parallel or in a consecutive order depending on the requirements of the grant. Given the university-specific approval process, JMU staff will need to identify the necessary reviews early and build that into the timeline.

In backward planning, we begin with the deadline and, assuming there is a decision to pursue, we follow a structured process to stay on track. Our grant development process follows a structured, collaborative approach designed to ensure clarity, alignment with requirements, and the on-time submission of a high-quality proposal. **Having a clear plan in place with timelines is key to successful proposal development**, as it reduces stress, clarifies the roles of everyone involved, and allows the team to identify potential challenges early and address them proactively. Regular check-ins and a dedicated proposal manager help coordinate the effort. We also maintain a central repository of materials so all contributors have access to the most current information. The PLACE Team is adept at this process, having served as proposal managers, grant writers, and quality assurance reviewers for large research firms, universities, and state agencies.





The PLACE Team process initiates with a kick-off meeting that includes key proposal writers, the budget lead, proposal manager, and administrative or budget staff as needed. During this meeting, the team: (a) establishes a detailed proposal timeline that clarifies deadlines for outlines and rough/final drafts, (b) specific parameters about the proposal that need to be followed (e.g., formatting, page limits), (c) determines writing responsibilities by narrative section, and (d) schedules regular check-ins to monitor progress. The team also discusses key win themes, project goals, and required resources. The proposal manager then prepares an initial proposal outline, incorporating evaluation criteria, page limits, and assigned authors. At this stage, the team also determines which staff will be proposed, and the proposal manager collects resumes and bios and tailors them, as needed, to the specific opportunity. To ensure consistency of the proposal narrative—particularly when multiple authors are contributing sections—we clearly establish a shared understanding of the intended outcomes and develop a logic model that aligns project activities, outputs, and expected impacts, providing a common framework to guide narrative development. **From our experience, this critical step is often missed.**

Building from these early foundations, draft sections are then completed and shared with selected reviewers—large proposals may involve multiple expert reviewers—with feedback provided to writers and relevant boilerplate language incorporated, where applicable. In parallel, a draft budget is developed and shared with the proposal lead, with discussions held with section writers to ensure alignment between the narrative and budget. A comprehensive draft of both the technical and budget proposals is then reviewed by the proposal lead before undergoing formal reviewer approval by the appropriate administrator, department head, budget office, or other designated authority. Following approval, the proposal undergoes final editing and formatting to meet JMU standards, and the proposal lead conducts a final review prior to submission. To mitigate risks associated with



submission systems or technical issues, the completed grant is submitted ideally one to two days prior to the submission deadline.

IV.B.5.4. Integration with JMU CARE/COE Priorities

A central element of our approach is ensuring that across all stages—from identifying potential opportunities, to assessing fit and developing grant proposals—we **stay aligned with JMU CARE's mission, priorities, and strategic goals**. Early in the engagement, the PLACE team will work with JMU CARE leadership and the Center's key stakeholders to develop a shared understanding of priority research areas, programmatic initiatives, partnership interests, and desired long-term outcomes. These priorities will be integrated within practical tools that guide opportunity scanning, fit assessment, and proposal development (e.g., priority-aligned screening and fit assessment criteria). By systematically integrating JMU CARE priorities into each stage of the process, we ensure that pursued opportunities advance the Center's research agenda, strengthen its network of collaborators, and contribute to sustainable growth in externally funded projects.

IV.B.6. Grant Drafting, Compliance, and Submission Processes

RFP Requirement: "Describe your processes for narrative drafting, budget creation, compliance crosswalks, and submission support."

The PLACE Team has demonstrated excellence in the full lifecycle of federal and private grant development—from strategic conception through award and sustained performance. We understand how to create and expand a diversified portfolio of federal, state, foundation, and international clients and partners. Our track record shows that we consistently convert initial engagements into expanded, multi-year relationships that attest to the quality of our work. This begins at the stage of proposal development. Through an iterative process of drafting and refinement, we write compelling narratives, generate comprehensive budgets, identify compliance needs, and ensure timely submission of grant proposals.

IV.B.6.1. Narrative Drafting

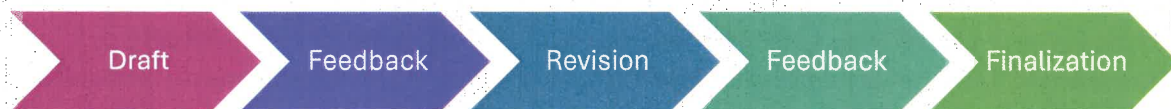
Our approach to narrative and budget development is iterative, collaborative, and grounded in extensive experience with competitive proposal development. The PLACE team brings over **30 years of experience winning grants** to carry out research studies and large-scale evaluations and to lead targeted and multi-faceted implementation projects. We begin by carefully analyzing solicitations to ensure we fully understand the funder's goals and evaluation criteria. This early review allows us to confirm that the opportunity is a strong fit (see B5.2.) and to develop a writing strategy that clearly responds to the criteria (see B5.3.). Our team has worked with proposal teams that span multiple organizations and disciplines, helping to "connect the dots" among ideas from multiple contributors. While proposals often involve multiple writers. Through each engagement, we ensure that the final narrative reads with **one clear voice and a consistent message**, supported by a shared understanding of outcomes, a logic model, and clearly articulated win themes.



This proposal serves as an exemplar; four authors with very distinct writing styles and preferences contributed to this narrative.

Crafting high-quality proposals requires more than simply answering the questions posed by the funder. It requires a deep understanding of the funder's priorities and a compelling narrative that demonstrates how JMU CARE will address those priorities through proven expertise and innovative approaches. Our team focuses on narratives that show, not simply tell, clearly illustrating how the proposed project will support the funder's mission and achieve measurable results. When clients identify ambitions that may exceed the available timeline or funding, we work collaboratively to refine the scope and propose creative alternatives that maintain the project's core goals while ensuring feasibility and competitiveness.

Narrative drafting proceeds through **multiple rounds of development and review**.



Section authors prepare initial drafts aligned with the proposal outline and evaluation criteria, after which the proposal lead and reviewers provide targeted feedback to strengthen clarity, alignment, and persuasiveness. This iterative process continues until the proposal presents a cohesive and compelling case for investment. Our team's advanced writing and editing skills ensure that each section reinforces the overall narrative and clearly communicates the value of the proposed work.

IV.B.6.2. Budget Creation

Budget development occurs **in parallel with narrative drafting** so that the scope of work and financial plan remain closely aligned. Our team has extensive experience preparing, monitoring, and reporting on budgets for federal, state, nonprofit, and corporate grants. We approach budgeting as both a technical and strategic exercise: the “math” ensures that costs are calculated accurately, while the “art” draws on past experience to estimate staffing, travel, and direct costs realistically. Using the task structure of the grant, we develop detailed estimates of staff time, project activities, and associated costs.

To support this process, we use **customizable budget templates** that allow proposal teams to build monthly, annual, or task-based budgets. These tools facilitate discussions about labor hours, staffing allocations, travel tied to specific activities, and other direct costs. The resulting detailed budgets support both proposal development and post-award project management by creating a clear structure for tracking expenditures and deliverables. Across our portfolio, the PLACE team has successfully developed proposals and managed awards ranging from **\$25,000 to \$13.9 million**, demonstrating our ability to support projects of varying scale and complexity.



IV.B.6.3. Compliance Crosswalks

As noted in Section B5, the proposal process begins with a proposal team kickoff meeting that includes the proposal lead(s), writers, reviewers, and the proposal manager. One team member, typically the proposal manager, develops a detailed outline that incorporates the funder's evaluation criteria and technical specifications (e.g., page limits, formatting requirements) to guide the writing process. At this early stage, we also create a **compliance crosswalk** to ensure that each requirement in the solicitation is clearly addressed in the proposal. In addition, the team develops a **proposal submission checklist** that identifies all required components of the application, which may include completing forms, preparing supporting documents, and submitting required data or attachments through online systems.

Proposal reviewers are responsible for assessing draft sections against the evaluation criteria, approaching the review as if they were the funder's reviewers. Their role is to determine whether the proposal clearly meets the stated criteria and to provide constructive, critical feedback. Our preferred process, with demonstrated success, is to provide substantive feedback during the first draft review, focusing on alignment with criteria, clarity, and overall persuasiveness. In the second round of review, feedback typically becomes more targeted and may include suggested or alternative language to strengthen the narrative. When time allows, proposals undergo at least two rounds of review and may include additional reviewers to provide complementary perspectives and critiques.

The PLACE Team's experience informs our understanding of proposal criteria and how to respond effectively and strategically. We have worked under the requirements of federal, state, and other funding agencies and are familiar with their compliance expectations, which may include regular reporting, data collection and analysis, tracking deliverables and budgets, identifying and addressing project challenges, and communicating program outcomes to funders. Members of our team have also served on proposal review panels and understand the process from the perspective of both funder and grantee. In addition, we have experience monitoring subgrantee awards and conducting audits, providing further insight into the compliance, documentation, and accountability expectations associated with funded projects.

IV.B.6.4. Submission Support

Our team has extensive experience preparing and submitting grant proposals to a wide range of federal, state, foundation, and corporate funders, each with distinct submission requirements and systems. Because submission processes vary widely, we begin by carefully reviewing the funder's submission instructions and, when applicable, testing the online submission portal in advance to fully understand required fields, document formats (e.g., Word, PDF), and system constraints (e.g., file size limits). This preparation ensures that the proposal team understands all technical requirements well before the deadline so that **no surprises occur on the day of submission**.



When the lead institution—such as JMU—is responsible for the final submission, the systems and processes (i.e., compliance crosswalk, submission checklist, and clearly organized proposal files) are designed to fully support the institution's submission team. We also ensure the final package is structured in a way that mirrors the order and requirements of the funder's submission portal, making it easy for the institution to submit.

Through our experience, we have also observed how small submission errors—such as missing forms, incorrect attachments, or failure to meet formatting requirements—can result in proposals being disqualified before they are even reviewed. As part of our capacity-building approach, we share these lessons learned with proposal teams and emphasize the importance of early submissions and careful verification of requirements. By preparing materials well in advance and supporting the institution's submission process with clear documentation and organized files, we help ensure that the proposal can be evaluated on its quality and merits rather than be jeopardized by avoidable administrative errors.

IV.B.7. Facilitation Techniques that Balance Critique and Capacity-Building

RFP Requirement: "Detail facilitation techniques for strategy sprints, decision framing, and issue analysis; how will your firm balance constructive critique with capacity building?"

The PLACE Team approaches facilitation as both a **strategic and capacity-building process** that helps partners clarify goals, analyze complex challenges, and make informed decisions. Our facilitation methods are designed to create structured, productive discussions that surface diverse perspectives while guiding participants toward actionable outcomes. Through techniques such as strategy sprints, decision framing, and issue analysis, we help teams quickly synthesize information, identify priorities, and develop clear paths forward. Throughout this process, we balance constructive critique with a supportive approach that strengthens internal capacity, ensuring that partners not only reach decisions but also build the skills and systems needed to sustain strategic thinking over time. We have successfully facilitated and participated in strategic planning with Not-for-Profit and Higher Education Boards, C-Suite leaders, and multi-level teams within organizations and educational systems. Below, we highlight our approach; sample facilitation activities we have successfully implemented with multiple stakeholders are located in the [REDACTED]

Given the current funding environment and the need to support both new and ongoing research programs, strategic planning should be actionable and flexible.

B7.1. Strategy Sprints

We facilitate strategy sprints through short, focused working sessions designed to help teams rapidly clarify priorities, test ideas, and/or develop actionable strategies around a specific opportunity or challenge. These sessions typically bring together key



stakeholders—including project leads, subject-matter experts, and decision-makers—to review relevant information, identify strategic options, and align on next steps within a structured timeframe.

Prior to facilitating a strategy sprint, our team will work collaboratively with the JMU CARE staff to determine the most effective process for gathering background information and stakeholder input. This preparation may include reviewing existing plans, resources, and prior initiatives; examining priorities and actions already taken; and conducting targeted interviews with select staff to understand the work that has led to the current need or opportunity. These conversations help our facilitation team identify where the university has been particularly effective or strategic, clarify its “significant difference”—the areas where JMU stands out from others—and ensure that the appropriate stakeholders are included in the sprint so that the **right voices are at the strategic planning table**.

During the strategy sprint itself, the PLACE Team facilitates a guided process that begins with clearly defining the objective of the session, such as preparing for a funding opportunity, refining a project concept, or assessing a potential partnership. Participants are then led through structured activities that may include rapid environmental scanning, identification of strengths and gaps, alignment of proposed activities with funder priorities, and discussion of potential risks or constraints. By the end of the session, the team typically produces a shared set of priorities, a refined concept or project framework, and clear assignments for follow-up actions.

From our experience, these sessions are particularly valuable in proposal development and strategic planning because they enable teams to **move efficiently from ideas to structured concepts** while incorporating multiple perspectives. Strategy sprints also support long-term capacity building by modeling structured decision-making and collaborative problem-solving processes that JMU CARE teams can continue to use in future planning and partnership development efforts.

IV.B.7.2. Decision Framing

Decision framing is a facilitation technique we use to clarify the scope, purpose, and parameters of a strategic decision before a team begins detailed planning or action. Depending on the purpose and complexity of the issue, decision-framing sessions may take the form of a 2–3 hour facilitated discussion, a half-day working session, or a full-day planning meeting. These sessions can occur either **before or after a strategy sprint**, depending on the objective. When conducted prior to a sprint, decision framing helps define the key elements that will guide the discussion—ensuring that participants share a common understanding of the decision at hand. For JMU CARE, this process may include clarifying **who** the key decision-makers are, and which stakeholders should inform the process; **what** the team aims to achieve, including the intended outcomes and measures of success; and **why** the work is being undertaken by articulating the central question or challenge the team is seeking to address.

Decision framing can also be used after an initial strategy sprint to support prioritization and action planning. For example, the process may help determine which grant opportunities to



pursue, identify potential funders aligned with JMU CARE priorities, and assign grant development or research strategy responsibilities to appropriate team members. By structuring these discussions around clearly defined criteria and shared goals, decision framing helps teams make transparent, well-supported decisions about how to allocate time and resources. Through facilitated sessions, we promote thoughtful, inclusive decision-making while maintaining forward momentum toward clear outcomes.

We know from experience that group dynamics matter. We have successfully facilitated discussions in ways that prevent dominant voices from overshadowing others. We use multiple engagement modalities—such as structured rounds, small-group dialogue, written input, and anonymous feedback—to ensure that all perspectives are surfaced and thoughtfully considered.

IV.B.7.3. Issue Analysis

Issue analysis helps teams break down complex challenges by clarifying root causes, examining contributing factors, and identifying practical options for action. The PLACE Team approaches issue analysis through the lens of **Appreciative Inquiry** (Cooperrider & Whitney, 2005), which begins by examining what JMU CARE staff are already doing well and where existing strengths and successful practices can be leveraged. Starting with strengths establishes a constructive tone for strategic discussions and helps identify the institutional assets that can serve as a foundation for future growth. This strengths-based orientation does not avoid difficult conversations. Rather, it creates the conditions for an honest and productive assessment of challenges and barriers faced by JMU CARE staff. Through Appreciative Inquiry, the goal is to understand the underlying factors contributing to challenges and identify practical, strengths-based strategies to address them. We facilitate these discussions within a context of psychological safety, ensuring that staff feel comfortable sharing ideas, critiques, and observations. Staff who can clearly articulate where barriers exist provide valuable insight that helps the team move toward more effective approaches.



One of our primary facilitation strategies involves **Appreciative Inquiry interviews**, which are structured conversations conducted between pairs of colleagues. In these exchanges, each participant interviews the other to surface strengths, experiences, and aspirations related to their work. These conversations help identify existing resources, current programs and opportunities, perceived challenges and barriers, and staff perspectives on the future growth of JMU CARE. The insights generated through this process provide a strong analytical foundation for identifying what works and exploring how those strengths can inform future strategies.

IV.B.7.4. Balancing Constructive Critique with Capacity Building

Throughout this section, we have described how we facilitate critical decision-making conversations. The PLACE Team shares a grounding belief: **the collective insight of the group leads to stronger outcomes; the smartest person in the room is the room.** This perspective encourages full engagement while recognizing that participants may bring strong professional perspectives and differing views about priorities, strategies, or past approaches. Our role is to surface these perspectives constructively so that tensions become productive inputs rather than barriers. We structure conversations to ensure that critique is expressed professionally, safely, and in ways that motivate improvement while preserving trust among participants.

To support this balance, we often begin with a **“low-threat” entry point** by discussing common capacity-building challenges faced across universities and research organizations. This framing helps staff see that many issues are systemic and widely experienced rather than personal or unique to their context. Examples may include misalignment between individual and organizational capacity, unclear systems and processes, professional development disconnected from daily work, limited support for pursuing new opportunities, uncertainty about how to provide constructive critique, or insufficient recognition of contributions. By examining these common patterns, participants can identify which challenges resonate in their environment and begin exploring solutions collaboratively.

These facilitated discussions build both **strategic clarity and internal capacity**. They help teams align grant strategy with institutional priorities while fostering a more collaborative, team-oriented culture—an important complement to academic environments that often emphasize individual achievement. When appropriate and desired by JMU CARE leadership, our team can also support conversations about structural practices that strengthen interdisciplinary and interinstitutional collaboration, helping teams develop shared norms, increase trust, and create conditions that support innovation and collective success.

IV.B.8. Strengthening Research Methods, Project Management, and Knowledge Systems

RFP Requirement: "Outline your approach to strengthening research methods, project management, and knowledge systems. Provide sample curricula and materials."

Throughout this proposal, we have highlighted how we center collaboration to promote continuous improvement. Strengthening research methods, project management, and knowledge systems requires the same. Our team establishes clear standards, implements them in active engagements, and periodically reviews and refines practices to ensure sustained rigor and scalability. These domains are treated as core organizational infrastructure and supported by formal documentation and structured internal review. Below we outline our approach to strengthening research methods, project management and knowledge systems. Sample curricula and materials are located in the [REDACTED]



IV.B.8.1. Strengthening Research Methods

We strengthen research methods by maintaining disciplined alignment among research questions, theory-of-change frameworks, design decisions, and analytic strategies. This includes refining logic model practices, standardizing instrument development protocols, clarifying sampling and analytic decision rules, and documenting assumptions and limitations across studies. These practices help ensure that research designs are methodologically sound and that findings are credible, transparent, and useful for both scholarly and applied decision-making.

Where appropriate, we develop and maintain reusable tools and shared standards—such as logic model templates, instrument review protocols, analytic planning guides, and data management planning tools aligned with compliance requirements. These tools promote consistency across projects while allowing flexibility to adapt to different research contexts. We periodically reassess these tools and frameworks to ensure responsiveness to evolving research questions, methodological advances, and changing contextual conditions.

When projects require specialized methodological expertise (e.g., advanced statistical modeling, quasi-experimental design, culturally responsive evaluation, or sector-specific subject matter knowledge), we draw strategically from our established network of research collaborators and technical experts. This approach strengthens analytic rigor while expanding the range of methods available to support JMU CARE initiatives.

Recently the PLACE Team leveraged a strategy sprint to refine a proposed study design for an impact evaluation, where the funder desired a randomized control trial. We convened quantitative researchers, impact evaluation specialists, and subject matter experts, ultimately electing not to bid. We felt strongly that a measurement validation study was needed prior to an impact evaluation. We chose not to pursue the opportunity to uphold our commitment to research integrity.

Ongoing methodological strengthening is further supported through internal and external peer review, structured debriefs following major deliverables, and regular review of emerging research and evaluation frameworks. These activities help ensure continuous improvement in research quality while building the internal capacity of project teams to design, implement, and interpret rigorous studies.

IV.B.8.2. Strengthening Project Management

Effective project management underpins the successful execution of complex research initiatives involving multiple stakeholders while maintaining quality, fiscal responsibility, and timeline integrity. The PLACE Team uses structured project management systems and workflows to ensure that research design, data collection, analysis, and reporting activities remain coordinated across interdisciplinary teams. We further strengthen project management systems by clarifying roles and decision responsibilities (e.g., RACI framework), automating workflows, and standardizing documentation and reporting



practices. These efforts may include developing or refining project charters, milestone tracking dashboards, risk registers, status reporting templates, and meeting documentation protocols. We also build out data collection calendars aligned to evaluation plans, both for internal use and to share with study/evaluation participants (as relevant). Together, these tools promote accountability, transparency, and coordinated progress across project teams while ensuring that deliverables remain aligned with project goals and timelines.

Project management systems are periodically reviewed to assess workflow efficiency, communication effectiveness, and risk mitigation practices. Structured milestone reviews and post-project reflections help identify opportunities for refinement, ensuring that management processes evolve alongside project complexity and scope while strengthening the capacity of teams to manage future initiatives effectively.

IV.B.8.3. Strengthening Knowledge Systems

Knowledge systems determine how effectively we capture, organize, protect, and use information. We strengthen these systems by formalizing file architectures, naming conventions, version control standards, documentation protocols, and data classification practices to ensure clarity, compliance, and continuity across projects, and, where appropriate, in collaboration with the client. These practices preserve institutional memory and mitigate risks associated with staff transitions or distributed work environments.

As with research and project management systems, knowledge systems are periodically reviewed to ensure functionality, security, and alignment with evolving regulatory expectations. We assess whether information flows effectively across teams and partners, whether reporting formats support decision-making, and whether documentation practices adequately capture institutional memory. Systems are refined as needed to improve usability and sustainability.

Strengthening knowledge systems also involves enhancing knowledge utilization. This may include development of dashboard-style reporting tools, structured evaluation summaries that link findings to strategic choices, briefing templates for clients and partners, and knowledge translation frameworks that convert research into actionable insight.



IV.B9. Research Design, Logic Models, Instruments, Sampling, IRB Readiness, Data Collection & Analysis, and Reporting Methods

RFP Requirement: "Describe your methods for research design, logic models, instrument development, sampling, IRB readiness, data collection & analysis, and utilization-focused reporting."

Our approach to research and evaluation is collaborative, question-driven, and methodologically rigorous. We begin by working with project partners to clarify the goals and intended outcomes of the work, which helps determine whether the appropriate approach is a research or an evaluation study. Once this distinction is clear, we design the study based on the specific research or evaluation questions, underlying assumptions or hypotheses, decision-making needs, and intended audiences. In all cases, we tailor the design to balance methodological rigor with feasibility, funder expectations, and JMU CARE's strategic priorities, ensuring that the resulting evidence is both credible and useful for informing practice, policy, and future research.

IV.B.9.1. Study Design

Research and evaluation both use systematic methods to collect and analyze data to understand whether something works, but they differ in purpose and context. Research typically seeks to generate generalizable knowledge and may attempt to control variables to isolate effects, whereas evaluation focuses on understanding how a specific program or intervention operates in real-world settings where such control is limited. The choice between these approaches is often shaped by factors such as funder requirements, intended outcomes, and whether the goal is to contribute to broader knowledge or inform decisions about a particular program. This distinction helps guide the selection of an appropriate study design. The table below depicts the distinguishing aspects:

Aspect	Research	Evaluation
Purpose	Generate generalizable knowledge or test theories	Determine the value or effectiveness of a specific program or practice
Key Question	<i>What works, why does it work, and can the findings generalize beyond this setting?</i>	<i>How well is this program working here, for whom, and under what conditions?</i>
Approach	Often attempts to control variables to isolate effects	Recognizes that full control is rarely possible and examines how programs operate in real-world conditions
Key Audiences	Researchers and the broader knowledge base; contributes to theory and literature	Stakeholders and decision-makers; informs program improvement, continuation, or funding

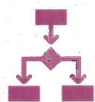


Regardless of whether the work is framed as research or evaluation, our process begins with structured study design planning. This includes clarifying the purpose of the inquiry (e.g., exploratory, descriptive, evaluative, or explanatory), identifying core questions and hypotheses, defining intended users of findings, and surfacing the decisions the study is intended to inform. We also assess feasibility constraints—including timelines, available resources, and data access—to ensure that methodological rigor is balanced with practical implementation realities. Depending on the study objectives and intended uses of the findings, we select methodological approaches that best align with the questions being asked and the decisions the study is intended to inform. We may propose quantitative, qualitative, or a mixed-methods design.



Qualitative methods to explore experiences, processes, and contextual factors.

Potential designs: Case studies, comparative case studies, phenomenological studies, or grounded theory



Quantitative methods to measure patterns, outcomes, and relationships.

Potential designs: Experimental and randomized controlled trials, quasi-experimental designs (e.g., difference-in-differences, regression discontinuity, propensity score matching), longitudinal, or cross-sectional studies



Mixed methods to understand complex questions by combining quantitative patterns with qualitative insights that explain how and why those patterns occur

Potential designs: Sequential exploratory design, sequential explanatory design, or convergent parallel mixed methods

When appropriate, we also incorporate participatory action research (PAR) strategies to engage stakeholders directly in the inquiry process, strengthening relevance and ownership of findings. For initiatives that are evolving or operating in complex systems, we may apply developmental or implementation-focused evaluation models to support continuous learning and adaptation. Across all study designs, we maintain disciplined alignment among the research questions, data sources, and analytic strategies to ensure that the evidence generated is both methodologically sound and actionable for decision-makers.

Approach to Literature Review and Evidence Synthesis

Where appropriate, we conduct structured literature reviews to situate the study within existing research and policy contexts. Our approach may include targeted or systematic searches of peer-reviewed scholarship, practitioner literature, policy reports, and relevant gray literature (i.e., high-quality research reports, policy briefs, white papers produced outside of traditional academic journals). We assess the strength and relevance of existing evidence, identify areas of consensus and debate, and surface methodological limitations in prior studies.



Findings from the literature review inform refinement of questions, development of conceptual frameworks and logic models, selection of validated instruments where available, and identification of measurable indicators. In evaluation contexts, evidence synthesis helps clarify expected outcomes and plausible causal pathways. Literature reviews may result in annotated bibliographies, synthesis briefs, or framing memos that support both research design and knowledge translation.

Approach to Utilization-Focused Evaluation

We are adept at designing evaluations to be utilization-focused (Patton & Campbell-Patton, 2021). Doing so ensures that evaluation activities are designed from the outset to produce findings that are meaningful and actionable for JMU CARE and its partners. We work collaboratively with intended users to clarify evaluation questions, shape study design, interpret results, and determine how findings will be communicated and applied. By embedding use into each stage of the evaluation process, we help ensure that results support learning, program improvement, and evidence-informed decision-making.

IV.B.9.2. Logic Model Development

Our approach to logic model development is grounded in theory-of-change principles (i.e., explaining the logic of the change process). When appropriate, we work collaboratively with the client and relevant stakeholders to articulate the initiative's theory of action (i.e., the specific interventions or strategies activate change), clarifying how resources and activities are expected to generate short-, intermediate-, and long-term outcomes within specific contextual conditions. This process involves identifying inputs, core activities, outputs, and intended outcomes, while surfacing underlying assumptions, mediating factors, and external influences that may shape implementation and results. We assess internal coherence within the model to ensure that proposed activities plausibly lead to intended outcomes and that outcomes can be operationalized through measurable indicators.

The resulting logic model serves as an analytic anchor, guiding indicator selection, instrument development, sampling decisions, data collection, and reporting frameworks. Logic models are treated as iterative tools and may be refined as implementation evolves and new evidence emerges.

Within utilization-focused and participatory designs, we ensure study participants are actively engaged in refining logic models, especially to document key learnings from early successes/challenges.

In addition to logic models, the PLACE Team is experienced in using results frameworks and logical frameworks (log frames) commonly employed in international development and large-scale grant programs. While similar to traditional logic models, log frames explicitly articulate key indicators, means of verification, and key assumptions and risks across the activities, outputs, outcomes, and overarching goals/impacts.



IV.B.9.3. Instrument Development

Instrument development is driven by research objectives, validity considerations, and intended use of findings. We begin by reviewing existing validated instruments, and if appropriate, we develop new tools to capture context-specific constructs. Instruments are aligned directly with logic model outcomes and research questions.

We prioritize clarity, cultural responsiveness, and accessibility, and conduct peer review of instruments if needed. We assess instruments for construct validity, reliability (where applicable), analytic alignment, and respondent burden. When feasible, we pilot or cognitively test instruments. Where appropriate, we integrate both structured (quantitative) and open-ended (qualitative) components to provide richer insight.

IV.B.9.4 Sampling Strategy

Sampling approaches are selected based on the research design, target population, and feasibility constraints, with careful attention to how sampling decisions influence the **statistical power and interpretability of the study**. We determine the target population and appropriate unit of analysis, assess the availability of the sampling frame, estimate the sample size required to support analytic goals (often informed by power analysis), and consider representation and equity in the study population.

Depending on the study, sampling strategies may include census approaches, stratified or purposive sampling, random sampling, or convenience or recruitment-based sampling when appropriate and transparently disclosed. We clearly document sampling assumptions, limitations, and implications for statistical power, analytic validity, and generalizability of findings.

IV.B.9.5. IRB Readiness and Ethical Considerations

For projects involving human subjects, we integrate IRB readiness and compliance early in project planning. We clarify whether the activity constitutes research or program evaluation, prepare required protocol documentation, draft consent and recruitment materials, and document data security and confidentiality protections consistent with institutional policies. Ethical review considerations are embedded into project planning to avoid delays and ensure participant protections are upheld throughout the study. See section B21 for additional detail related to our team's experience with IRBs and conducting ethical, human-subjects research.

IV.B.9.6. Data Collection and Analysis

Data collection procedures are designed to align directly with the selected research or evaluation design and are structured, standardized, and fully documented. For qualitative studies, this may include interview, focus group, observation, or document review protocols with standardized guides and coding frameworks; for quantitative studies, it includes instrument administration procedures, survey protocols, and structured data extraction from administrative or secondary data sources. In mixed-methods designs, we coordinate collection of qualitative and quantitative data to ensure temporal and conceptual alignment



across evidence streams. Across all designs, we establish clear data collection protocols, provide training for data collectors when applicable, implement secure storage and transfer processes aligned with our data management standards, and conduct quality checks to ensure completeness and consistency. Where projects involve FERPA-adjacent or sensitive education data, we apply strict access controls and classification protocols as described in our data management plan.

Analytic methods are selected to directly address the research questions and analytic framework established in the study design. Quantitative analyses may include descriptive statistics, regression modeling, comparative or quasi-experimental analysis, and longitudinal or subgroup analysis to examine relationships and outcomes. Qualitative analyses may involve structured coding, thematic analysis, or cross-case synthesis to identify patterns, contextual factors, and explanatory insights. In mixed-methods studies, we apply integration strategies—such as convergent analysis, sequential explanatory designs, or joint displays—to connect quantitative patterns with qualitative interpretation. Throughout the analytic process, we document assumptions and limitations and apply internal methodological quality assurance review prior to final reporting.

IV.B.9.7 Utilization-Focused Reporting

Our reporting approach is grounded in Utilization-Focused Evaluation principles, ensuring that findings are communicated in ways that support **practical use by intended stakeholders**. While UFE is most directly applied in evaluation contexts, we extend these principles to reporting findings from studies using a range of qualitative, quantitative, and mixed-methods designs by prioritizing clarity, relevance, and decision usefulness.

Reporting is explicitly aligned with study questions and the program logic model or theory of change. We clearly explain implications for policy, programming, and strategy. Deliverables may include executive summaries tailored to specific audiences, technical appendices for funders or academic review, and visual summaries such as dashboards or graphics when appropriate.

To further support utilization, we facilitate structured debrief sessions that allow stakeholders to interpret findings collaboratively and identify next steps for program improvement, research development, or strategic planning. When participatory approaches are used, stakeholders may also be engaged throughout the process, including training in research methods, participation in data collection activities, co-interpretation of findings, and shared dissemination strategies.

The objective is not only to generate credible evidence but to translate that evidence into actionable insight that can inform decision-making and continuous improvement.

IV.B.10. Accessibility and Inclusive Design

RFP Requirement: "Explain how your firm ensures accessibility and inclusive design across reports, tools, trainings, and web-based materials integral to project deliverables."



The PLACE Team has led work in education, workforce, and disability for decades and integrates accessibility and inclusive design principles into the development of reports, tools, trainings, and other project materials to ensure they are usable and accessible to diverse audiences. We develop—and have provided training and technical assistance on how to design—accessible content that complies with Section 508, WCAG 2.0, and ATAG accessibility standards. We follow the POUR principles ([National Center on Accessible Educational Materials, n.d.](#)):

Perceivable. Allows all learners to see and hear information.

Operable. Helps learners navigate information independently using their preferred tools.

Understandable. Supports learners' understanding through a consistent and predictable design.

Robust. Works for learners on a range of technologies (e.g., computer, mobile device).

The specific ways in which we will address the POUR principles are reflected in the table below.

Principle	Accessible Design Features
Perceivable	• Alternative text/descriptions added to images/decorative images identified. • Closed captions/transcripts included for audiovisual elements. • Sufficient color contrast used. • Color alone is not used to communicate meaning. • Text is readable and legible.
Operable	• Clear document/content structure with headings. • Descriptive hyperlinks (e.g., click “to access the document” instead of click “here”). • Avoiding content that flashes.
Understandable	• Provide clear directions. • Consistent format and design (e.g., only underlining hyperlinks). • Plain language is used throughout. • Glossary of terms developed. • In documents (Word, PDF), the language (English) will be identified.
Robust	• Descriptive metadata (e.g., document title, author) included. • Content checked for accessibility (e.g., Microsoft Office/Adobe accessibility checker, WCAG contrast checker). • If JMU CARE has staff with disabilities who require accessible formats, include them in beta testing, as appropriate.

Notably, as web-based tools and technology are expanding, we carefully review and assess new tools for their accessibility. This includes reaching out to software developers



and makers to request accessibility reports and to advocate for improvements when we find challenges to accessibility. Our team is adept at finding alternative solutions and offering comparable learning options for participants with disabilities to ensure they have the same learning experience. In addition, we seek input from stakeholders and participants about the accommodations that would be most effective for them to engage in research, evaluation, or implementation activities (e.g., sign language interpreters or communication access real time (CART), braille documents or audio options, accessible materials provided in advance, and one-to-one technical assistance).

IV.B.11. Time Estimation, JMU Inputs, and Assumptions

RFP Requirement: "Describe how your firm estimates hours for discrete tasks and multi-stream projects, the inputs required from JMU, and your assumptions."

Our team approaches budgeting for proposals and projects by ensuring that we have a clear understanding of the scope of work, the level of effort required to perform that work, and the potential for changes to project scopes and budgets over time. This ensures that cost estimates are realistic, transparent, and aligned with the work required to achieve project objectives.

For **discrete tasks or clearly bounded deliverables**, we estimate time by assessing the total level of effort required to complete the task from start to finish. This includes identifying the key activities involved (e.g., design, review, analysis, or reporting) and assigning the appropriate level of staff expertise needed to complete the work efficiently. We estimate the hours required for each role based on prior experience with similar tasks and adjust for factors such as staff expertise, expected revisions, and coordination needs.

For **larger scopes involving multiple tasks or deliverables**, our approach shifts from estimating individual tasks to modeling the full workflow of the project. We examine how activities relate to one another over time, identify dependencies among tasks, determine where work can occur in parallel, and account for coordination across project components and team members. This approach allows us to estimate not only the effort required for individual tasks, but also the additional time needed for integration, communication, and management across the full set of project activities.

When appropriate, we include contingencies or structured checkpoints that allow the team to revisit task estimates and costs as the project evolves, ensuring that resources remain aligned with project complexity and emerging needs.

Our estimations are based on PLACE Team use of time tracking tools (e.g., Timely, Toggle, Excel sheets, ADP timesheets) and past invoices from consultants and subcontractors doing similar work. We determine whether tasks can be estimated hourly or require deliverable based estimations. In addition to estimating the labor hours and costs, we also estimate direct costs and travel based on the detailed scope of work and experience working on similar research projects and tasks.



JMU Inputs and Shared Assumptions

Successful project delivery depends on clear inputs from JMU and shared operational assumptions that support effective coordination, timely decision-making, and adherence to project timelines and compliance requirements.

Inputs required from JMU include:

- Clear and detailed scope of work
- Defined deliverables, including expected format and level of detail
- Project timeline with key milestones and submission deadlines
- Budget parameters or cost constraints, when applicable
- Defined role expectations, including PLACE's role in proposal development and implementation if funding is secured
- Overview of JMU's internal processes (e.g., procurement requirements, faculty points of contact, grant submission procedures and deadlines)
- Access to relevant background materials (e.g., prior studies, strategic plans, program documentation, data dictionaries)
- Confirmation of data governance policies and any restrictions related to data access or sharing
- Institutional compliance requirements (e.g., IRB protocols, FERPA-related policies, data use agreements)
- Communication and decision-making protocols for project coordination
- Access to preferred collaboration tools or platforms used by JMU for document sharing and project coordination

Key project assumptions include:

- Clearly designated JMU project liaison and defined internal roles and responsibilities
- Timely responses to requests for information, feedback, and review of deliverables
- Access to relevant data and documentation required for research or project activities
- Availability of appropriate JMU staff for interviews, consultations, or strategy discussions
- Regular project meetings held at an agreed cadence to support coordination and progress
- Required institutional approvals (e.g., IRB, procurement approvals, data use agreements) completed within reasonable timelines
- Consolidated feedback from JMU stakeholders during review cycles



- Agreed communication channels and response expectations for project coordination
- Changes to scope, timeline, or deliverables discussed and mutually approved through a change management process
- Shared commitment to transparent communication and collaborative problem-solving throughout the project
- Final design and branding of project deliverables will be completed by JMU in accordance with institutional guidelines, with PLACE providing content-ready materials that can be incorporated into university-branded formats.

Perhaps the most important facet is the relationship between JMU and our team. We foster positive, professional relationships with all our clients. **Your success is our success.**

IV.B.12. Schedule Development, Milestone Tracking, and Risk Management

RFP Requirement: "Provide your approach to schedule development, milestone tracking, and risk management."

Successful projects require disciplined planning, transparent progress monitoring, and proactive management of potential risks. The PLACE Team integrates schedule development, milestone tracking, and risk management into a unified project management framework designed to maintain momentum while allowing flexibility when conditions change. Through structured work planning, clear accountability for deliverables, and ongoing monitoring of progress and potential risks, we help ensure that complex initiatives involving multiple stakeholders, deliverables, and compliance requirements remain on track. This integrated approach allows project teams and JMU CARE leadership to maintain clear visibility into progress while enabling timely adjustments that protect project quality, timelines, and outcomes.

IV.B.12.1. Schedule Development: Backward Planning with Built-In Flexibility

Our approach to schedule development builds on the structured planning practices described earlier for proposal development (see Section B5). We begin with a backward planning process, anchoring the schedule to key deliverables, compliance requirements, and fixed deadlines such as grant submissions, reporting cycles, or implementation milestones. From these endpoints, we sequence tasks in reverse order to identify dependencies, decision points, and the latest feasible start dates for key activities. The resulting work plan—often presented as a milestone calendar or Gantt-style timeline—identifies major deliverables, responsible parties, internal review cycles, and buffer periods for revisions and approvals. To maintain realism and flexibility, we incorporate contingency time around high-risk or multi-party tasks and distinguish between critical-path activities and tasks with greater scheduling flexibility.

IV.B.12.2. Milestone Tracking and Performance Monitoring



We maintain a structured milestone tracking process to support accountability, transparency, and timely project delivery. Milestones are tied to major deliverables and phases of work—such as proposal development, capacity-building activities, program implementation, or evaluation reporting—and are monitored through shared project management tools and regular progress reviews. During scheduled check-ins, we review progress against the timeline, confirm the quality and completeness of deliverables, identify emerging risks or bottlenecks, and determine whether adjustments to sequencing, staffing, or scope are needed. This approach ensures that JMU CARE leadership and project partners maintain clear visibility into project status while allowing for proactive course correction as the work evolves.

IV.B.12.3. Risk Management and Contingency Planning

Our risk management approach is proactive and structured, emphasizing early identification and mitigation rather than reactive problem-solving. At the outset of each project, we conduct a structured risk assessment to identify potential vulnerabilities that could affect timelines, quality, or deliverables. These may include:

- Delays in institutional approvals (e.g., IRB review, contracting, data use agreements)
- Faculty, partner, or stakeholder bandwidth constraints
- Funding uncertainty or shifting sponsor priorities
- Partnership coordination challenges across institutions or units
- Data access, quality, or compliance issues (e.g., FERPA-related restrictions)
- Staff turnover or changes in project personnel
- Technology or submission system issues that could affect deliverables or grant submission timelines
- Scope changes or evolving project requirements

For each identified risk, we document:

- The likelihood and potential impact of the risk
- Early warning indicators that signal emerging issues
- Mitigation strategies to reduce the likelihood or impact
- Contingency plans if the risk materializes

Mitigation strategies may include parallel processing of tasks where possible, cross-training team members to prevent single-point dependencies, pre-scheduling internal review sessions, and structuring work plans with modular project components that can scale based on available resources or evolving priorities. We also maintain clear documentation of decision points and dependencies to ensure that project teams can respond quickly to emerging challenges. Risks are reviewed regularly during project check-ins and formally



reassessed at major project phases. When adjustments are required, we use a structured change-management process that evaluates implications for scope, timeline, budget, and deliverables before confirming revisions to the project plan. This approach ensures that potential disruptions are addressed early while maintaining transparency and alignment with JMU CARE leadership and project partners.

We recognize that academic environments are dynamic. Our approach balances structure with adaptability, treating the project timeline as a living document. We reconfirm priorities at key inflection points, maintain communication, and document adjustments and their rationale. This ensures that flexibility does not compromise accountability or performance.

IV.B.13. Status Meetings, Progress Summaries, and Documentation

RFP Requirement: "Detail the cadence and format of status meetings, progress summaries, and documentation; your collaboration tools and responsiveness standards."

Our communication and reporting approach is structured, transparent, and aligned with project goals, funder requirements, and the needs of the project team. We establish a formal communication plan at project initiation that defines the cadence, format, and documentation standards for status meetings and progress reporting. This plan is calibrated to the scope of work, funding milestones, and other phases as needed.

IV.B.13.1. Status Meetings

The cadence of status meetings is determined by the project phase, complexity, and any relevant funder expectations. During active implementation or grant development phases, meetings are typically held monthly, while longer-term initiatives or mature implementation phases may shift to quarterly strategic review meetings. Additional meetings may be scheduled on an ad hoc or milestone basis to align with major deliverables such as grant submissions, evaluation reports, or partnership launches. Meeting frequency may increase during high-intensity periods and decrease during steady-state implementation phases.

Status meetings follow a structured agenda circulated in advance. Discussions typically include a review of progress against milestones and deliverables, updates on grant development or implementation activities, and—when relevant—updates related to budget alignment or resource needs. Meetings also include review of evaluation metrics and performance indicators, identification of emerging risks or barriers, and clarification of decisions and priorities for the next phase of work. Each meeting is facilitated to ensure clear outcomes, defined next steps, and shared accountability among team members.

IV.B.13.2. Progress Summaries

In addition to live status meetings, we provide structured written progress summaries aligned with funder reporting cycles and project needs. These summaries are typically produced on a monthly or quarterly basis depending on project scope, with formal reports



aligned to required funder reporting periods and additional summaries prepared following major milestones or deliverables.

Progress summaries follow a consistent format to support transparency and informed decision-making. They typically include a summary of activities completed during the reporting period, the status of major deliverables and milestones, performance against agreed-upon goals and metrics, and—when applicable—budget status updates. Reports also document any risks identified and mitigation actions taken, note adjustments to timeline or scope when necessary, and outline priorities and upcoming deadlines. All reporting is aligned with funder guidelines and designed to support compliance, transparency, and effective project management.

IV.B.13.3. Documentation

We maintain consistent and organized documentation practices to ensure institutional memory, compliance, and accountability. For all formal status meetings, documentation includes the date and time, participants present, agenda items, key discussion points, decisions made, and action items with responsible parties and due dates. Meeting notes are distributed promptly and stored in a shared project workspace accessible to authorized team members. Major decisions, scope changes, or timeline adjustments are formally documented to maintain clarity and alignment across stakeholders.

IV.B.13.4. Collaboration Tools

Collaboration platforms are selected based on university policies, funder requirements, and project scope. We prioritize working within the institution's preferred systems whenever possible. PLACE Team members are skilled in a variety of tools, including:

- Google Drive or SharePoint for collaborative drafting, shared document management, and version control
- Microsoft Teams or Airtable for project management and workflow tracking
- Teams, Zoom, or a university-approved virtual meeting platform

All shared environments follow clear organizational structures and naming conventions to support ease of access and transparency. Note that we will recommend accessible tools and platforms to ensure full participation of project teams.

IV.B.13.5. Responsiveness Standards

We maintain high responsiveness and structured communication practices to support dynamic project environments and effective engagement with JMU CARE and any relevant funders. To ensure clarity and efficiency, we designate primary points of contact who coordinate communication and facilitate timely decision-making. Our responsiveness standards include acknowledging communications within no more than two business days, providing draft review turnaround aligned with agreed-upon project timelines, and increasing responsiveness during high-intensity periods such as proposal development, reporting deadlines, or major deliverables. When urgent decisions or compliance-related



matters arise, we implement clearly defined escalation pathways to ensure timely resolution. Overall, this approach ensures that JMU CARE, project partners, and funders receive timely, structured, and transparent communication, supporting accountability, strategic alignment, and successful project execution.

IV.B.14. Key Personnel

RFP Requirement: "Identify key personnel (e.g., Principal/Lead Strategist, Senior Researcher—Harrisonburg/on-site, Grants Specialist, Methodologist, Project Manager, Data Analyst, Communications Lead). Provide resumes and percent allocation."

The PLACE Team brings decades of experience leading large, complex proposals for grants and contracts including for federal, state, local, foundation, private/corporate, and global entities. Our core staff and extensive consultant pool is interdisciplinary and composed of talented researchers, program evaluators, grant specialists, strategic planners, and organizational development specialists with expertise across content areas from education to adult learning and workforce development. Our team offers diversity in demographics and a broad mix of knowledge and educational backgrounds. Specific personnel for JMU CARE projects will be identified based on expertise needed, capacity, and proximity to Harrisonburg, as required by the negotiated scope.

IV.B.14.1. Core Staff

We propose four core staff with a combined 1.5 FTE availability to support JMU CARE over the next year. While we have identified specific roles for each core team member, we will ensure the best match of personnel for the specified scope. For example, while Ms. Shaewitz is identified as the Grants Specialist, she can easily support communications efforts—especially if knowledge translation is required. Similarly, Dr. Marx is identified as the Principal/Lead Strategist, but is within close proximity to Harrisonburg and for specific efforts may serve as the Senior Researcher assigned. Core staff bios outline our diverse range of subject matter expertise, which JMU CARE can leverage to strengthen its focus on interdisciplinary efforts. Resumes are located in the [REDACTED]

Teri Marx, Ph.D., Principal/Lead Strategist

Dr. Marx founded PLACE LLC, an organization providing professional learning, advocacy, consultation, and research and evaluation supports to improve outcomes for learners, especially with disabilities. Dr. Marx is a skilled mixed-methods researcher and evaluator with a multiyear history leading and evaluating technical assistance/personnel development efforts and directing external evaluations for state- and federally-funded initiatives. Dr. Marx is nationally recognized as an expert in special education, multi-tiered system of supports (MTSS) frameworks, and preK-12 educational systems. She has over fifty combined publications and presentations on topics spanning from community and family engagement to special education policy to data-informed instructional practices across preK-12 systems. Dr. Marx is proficient in implementation science and completed a certificate in Systems Thinking from eCornell University to learn emerging approaches to supporting systemic change in education. Dr. Marx is an active member of professional organizations including the Council for Exceptional Children, the European Evaluation Society, and the



American Evaluation Association. Dr. Marx is also a member of the Evergreen Data Academy, an online community of evaluators engaging in cutting-edge data visualization techniques. She serves as a peer reviewer for *Teaching Exceptional Children* and as a panel reviewer for the U.S. Department of Education's Office of Special Education Programs (OSEP).

Prior to founding PLACE, Dr. Marx was a Senior Researcher with the American Institutes for Research (AIR). In this role, she led technical assistance for the National Center on Intensive Intervention, the CEEDAR Center, and the PROGRESS Center. She also directed the Rhode Island Intensive Math Intervention Project, guiding the strategic implementation and evaluation of job-embedded, mathematics professional learning with educators across 28 schools in nine districts. Between her roles at AIR and PLACE, Dr. Marx has led or supported over 40 grant proposals.

Dr. Marx holds a Ph.D. in special education from the University of Nevada, Las Vegas, where she earned a Research Certificate from UNLV's Graduate College and completed a year-long program evaluation series. During her doctoral program, Dr. Marx also completed an internship at OSEP. She also holds a master's degree in social work from the University of Illinois at Chicago. Her early career was spent as a school social worker in some of the most marginalized communities in Chicago; she continues to focus on transforming urban education through her current role as a Board Member for the [Center for Success for High Need Schools](#).

Dahlia Shaewitz, Grants Specialist

Ms. Shaewitz is the founder and CEO of [Third Sight, LLC](#), where she leads innovative strategies for disability inclusion, workforce development, and leadership training. She has 30 years of experience in directing complex projects that advance disability rights, adult literacy, educational leadership, and vocational rehabilitation, impacting both policy and grassroots leadership across sectors. Her research and publications have contributed to policy reforms, improved program design, and the promotion of inclusive practices in both higher education and employment systems. Recognized for her expertise in knowledge translation, Dahlia has published data analyses and policy briefs to inform policies and practices to improve employment outcomes for people with and without disabilities. Her leadership has been acknowledged internationally, and she is a sought-after executive coach and mentor, known for driving systems change and fostering authentic, inclusive workplaces.

She also brings 30 years of leading winning proposals and grants, and has created grant review processes, trained teams on proposal writing, and built a network of funders across the disability, education, health, and workforce landscapes both domestically and globally. She has served as a reviewer on numerous federal and state proposal and grant review panels, and supported a foundation to establish their review process. Dahlia provides tailored coaching, technical assistance, and training that enable individuals and organizations to create actionable plans for disability inclusion, analyze and improve their policies, and foster highly effective, data-informed practices.



Jennifer R Crandall, Ph.D., Senior Researcher

Dr. Crandall is an education researcher and program and project leader with more than 20 years of experience advancing equity, access, and institutional effectiveness across the PreK–16 landscape, with particular expertise in postsecondary education policy and inclusive practice. She has designed and led qualitative and mixed-methods policy-relevant research and translated evidence into actionable strategies for education leaders and decision-makers. She brings deep experience working across culturally, linguistically, and diverse contexts in the US and internationally, and managing multi-year grant-funded initiatives with cross-functional teams and national partners.

As founder and principal of [Collegium Insights](#), Dr. Crandall leads and supports equity-focused research and strategic initiatives for national organizations and higher education institutions, including qualitative studies, program reviews, logic model refinement, and knowledge translation. Previously, as senior researcher at the American Council on Education (ACE), she led qualitative and survey research on higher education policy, freedom of speech, and leadership; managed grant-funded deliverables for major foundations (e.g., Lumina Foundation, Knight Foundation, and TIAA Institute); and produced research-to-practice resources used by institutional leaders nationwide. She has extensive experience overseeing project budgets, timelines, deliverables, and interdisciplinary teams.

Dr. Crandall has presented at national conferences—such as AERA and ASHE—and has served in multiple local, national, and international peer review roles, including as an editorial board member for the *NASPA Journal About Women in Higher Education* and proposal reviewer for the Mayor's Office of Community Affairs, the Mayor's Office on Latino Affairs, the Association for the Study of Higher Education, the Comparative and International Education Society, and the Teachers of English to Speakers of Other Languages. She has also served as adjunct faculty at The Catholic University of America and previously at the University of Pittsburgh and other institutions, teaching graduate and undergraduate courses in curriculum, psychology of learning, and higher education.

Emily Samose, M.Ed., Program Manager

Ms. Samose is the Founder of [ECS Consulting: Education and Community Solutions](#). She is a proven social sector consultant and thought leader committed to advancing community-driven education initiatives. With more than 25 years as an experienced facilitator and relationship builder, Emily excels at developing cross-sector partnerships, creating engaging learning experiences, conducting applied research, and managing projects to cultivate a positive education ecosystem. She has spent over a decade consulting with the Campaign for Grade-Level Reading, where she has contributed to investor relations and grants management, led communications management, supported a network of 350+ local communities in the implementation of policies and practices that advance holistic child development and currently designs virtual learning experiences on multiple topics related to early-school success and equitable learning recovery. She recently led a Community of Practice for the William Penn Foundation, focused on engaging researchers and practitioners to evaluate and implement playful learning in Philadelphia, resulting in a [new](#)



[publication for the field](#). Samose has also consulted with the Nashman Center for Civic Engagement and Public Service at George Washington University and the Eisenhower Institute at Gettysburg College along with the William T. Grant Foundation. She previously worked with an association of public libraries and the federal agency now called AmeriCorps where she managed a federal grant portfolio and led communications for the office of research and evaluation. She also previously worked in campus-community partnership development and student engagement in civic action with two California Universities: Notre Dame de Namur University and San Francisco State University. She has extensive experience with communications and project management in a variety of settings including higher education, nonprofit organizations, associations and at the federal level and looks forward to bringing these experiences to supporting JMU CARE.

IV.B.14.2. Other Staff

To complement the skills of our core staff—and to ensure capacity—we leverage an extensive network of consultants to support essential tasks, as needed. The PLACE Team includes consultants who represent diverse backgrounds and experiences. For this effort, the consultants identified include quantitative methodologists, senior researchers, data analysts, project managers, and communications specialists. Bios and resumes for proposed staff are available, upon request. Additionally, should the talent we have identified in this proposal not be available—or a different skillset/expertise is needed—we will work with JMU CARE to determine additional consultants that can round out our team.

The following table presents the labor categories/roles that various consultants can play, along with their specific areas of content/methodological expertise. The matrix underscores that our team brings overlapping skills and knowledge to support JMU CARE across projects and tasks (see B15). Within the table, “cross-cutting content areas” refers to individuals’ expertise in a variety of content, ranging from social-emotional learning and trauma-informed practices to family and community partnerships to technology/AI-based education. The labor category/role(s) column uses abbreviations to indicate various roles each person may play. These categories align with the pricing schedule.

P: Principal/Lead Strategist

M: Methodologist

SR: Senior Researcher

SP: Strategic Planner

R: Researcher

RA: Research Assistant

DA: Data Analyst

GS: Grants Specialist

PM: Project Manager

C: Communications



Labor Categories and Expertise Areas for Other Staff

	Labor Category/ Role(s)	Quantitative Expertise	Qualitative Expertise	Program Evaluation	Early childhood	K-12 education	Postsecondary and Higher Ed	Adult and Workforce Development	Cross-cutting content areas
Sarah Vach, Ph.D.	M, SR, P	x	x	x		x	x		x
Monique Felder, Ph.D.	P, SR		x	x	x	x			x
Candace Chance	SP			x					x
Isabella Fante, Ph.D.	DA			x	x	x			
Manolya Tany, Ph.D.	M, SR	x	x			x	x		x
Rachel Rush Marlowe	R, DA	x	x			x	x		x
Lisa Anderson	SP			x					x

	Labor Category/ Role(s)	Quantitative Expertise	Qualitative Expertise	Program Evaluation	Early childhood	K-12 education	Postsecondary and Higher Ed	Adult and Workforce Development	Cross-cutting content areas
Delphinia Brown	C, GS, PM	x	x	x				x	x
David D'Arcangelo	C, SP			x				x	x
Hasan Davis	C, SP			x		x		x	x
Rick Buchheri	SP			x					x
Bob Wittig	SP		x	x		x		x	x
Nick Coukoulis	R, GS, PM, DA	x	x	x		x			x
MJ Pattison	R		x	x	x	x		x	
Devon Wellington	GS, PM, C				x	x			x

IV.B.15. Contingency Coverage Model

RFP Requirement: "Explain your contingency coverage model for key personnel absences to maintain continuity of deliverables and on-site data collection."

We maintain a structured contingency coverage model to ensure continuity of deliverables, stakeholder engagement, and on-site data collection in the event of key personnel absences. Our approach is grounded in intentional role redundancy, cross-training, distributed leadership, and disciplined documentation practices, ensuring that no single individual is a critical point of failure.



Skill Redundancy and Cross-Functional Coverage

Our staffing model includes overlapping expertise across critical competencies, including research design and methodology, grant development and technical writing, project management, facilitation and training, evaluation and data analysis, and knowledge translation. At project initiation, we designate primary leads and secondary coverage for each major workstream (e.g., grant development, implementation coordination, evaluation, and on-site data collection). All team members remain informed of project progress through regular status meetings (see B13) and shared documentation, enabling rapid transition of responsibilities if coverage needs change.



Documentation and Knowledge Continuity

To safeguard continuity, we maintain structured documentation systems that ensure institutional knowledge resides with the team rather than any single individual. These practices include centralized project workspaces with organized file structures, up-to-date milestone trackers and task assignments, meeting notes documenting decisions and action items, version-controlled deliverables, and standardized operating procedures for data collection and reporting. This documentation allows qualified team members to step into project roles quickly with minimal disruption.



On-Site Data Collection Continuity

For projects involving on-site data collection, facilitation, or strategic planning sessions, we ensure redundancy through advance preparation and shared familiarity with protocols. At least two team members are trained in site protocols, instruments, and engagement plans. Data collection tools and procedures are standardized and documented, and field guides or facilitation scripts are developed to ensure consistent implementation. When feasible, team members shadow or co-facilitate early sessions to build shared familiarity with project context and stakeholders. In the event of an unexpected absence, a designated backup team member can assume on-site responsibilities while maintaining methodological integrity and minimizing schedule disruption.



Escalation and Communication Protocol

If a key personnel absence occurs, we implement a structured transition protocol to ensure transparency and continuity. This includes immediate notification to project leadership and, when appropriate, the JMU project officer; reassignment of responsibilities to a pre-identified secondary lead; review of upcoming deliverables and timelines to confirm feasibility; and clear communication with relevant stakeholders regarding continuity plans.



Maintaining Quality and Compliance

Because our staffing model includes senior-level expertise across research, project management, facilitation, and evaluation, replacement responsibilities are assumed by comparably qualified team members capable of maintaining methodological rigor, deliverable quality, and compliance with JMU and funder requirements.

Together, these practices ensure that deliverables, stakeholder engagement, and on-site data collection proceed without interruption, even in the event of temporary or unexpected personnel absences.

IV.B.16. Ongoing Training for Project Staff

RFP Requirement: "Describe ongoing training for project staff assigned to JMU."

The PLACE Team maintains a structured, continuous professional development model to ensure staff supporting JMU CARE remain current in research methods, evaluation practice, and evolving funding environments. Ongoing learning is integrated into our operations through quarterly internal review sessions where team members reflect on active engagements, share cross-project lessons, review methodological decisions, and identify opportunities for skill refinement relevant to JMU CARE's portfolio.

Team members also stay current through active participation in professional associations and networks (e.g., AEA, AERA, COABE, CSAVR, CEC, National Youth Leadership Council), engagement in national and state conferences, and service as proposal reviewers for federal agencies and foundations. These activities strengthen our understanding of emerging research methods, evaluation frameworks, and funding priorities while expanding connections with researchers, practitioners, subject matter experts, and agency staff.

Professional development is reinforced through applied practice. When new analytic tools, research approaches, or grant strategies are adopted, staff implement them within active projects and participate in internal peer review and targeted coaching to maintain methodological rigor and consistency. In addition, our work delivering professional development and technical assistance on research methods, data use, program design, strategic planning, and grant development further strengthens our internal expertise and ensures that staff assigned to JMU CARE remain at the forefront of research, evaluation, and grant strategy.



IV.B.17. Exemplars

RFP Requirement: "Provide examples (or anonymized excerpts) of grant narratives, budgets, strategic plans, research designs, logic models, evaluation plans, data instruments, analyses, and visualizations you have produced."

Within the [REDACTED] you will find examples of our work relevant to this proposal. Because some proposal materials contain sensitive information—such as detailed budgets, partnership agreements, or proprietary program designs—we provide **selected and, when necessary, anonymized examples** that illustrate our approach while protecting client and funder confidentiality. These materials may be adapted to remove identifying details or adjusted to reflect funder-specific formatting requirements.

These examples demonstrate the breadth and depth of PLACE Team members' collective project and proposal portfolio across diverse funding opportunities and project contexts. They may include grant narrative excerpts, budget templates and justifications, strategic plans, research designs, logic models, evaluation plans, data collection instruments, analytic summaries, and data visualizations. In each case, the materials reflect how our team tailors content, structure, and level of detail to meet the specific focus, evaluation criteria, and submission requirements of the funder. Collectively, these examples illustrate our ability to develop clear, compliant, and competitive materials that support proposal development, research design, and program implementation across a variety of funding environments.

IV.B.18. Editorial, Technical, Accessibility, and Methodological QA

RFP Requirement: "Describe your editorial, technical, accessibility, and methodological QA processes."

The PLACE Team employs a multi-layered quality assurance (QA) framework to ensure that all deliverables—written products, digital tools, evaluation instruments, and research outputs—meet high standards of accuracy, clarity, accessibility, functionality, and methodological rigor. Our QA processes are structured, documented, and scaled to the scope and complexity of each engagement. Quality assurance is embedded throughout the project lifecycle, with defined checkpoints during planning, drafting, review, and final delivery.

IV.B.18.1. Editorial Quality Assurance

Our editorial QA process ensures that written deliverables are clear, coherent, and aligned with client and funder expectations. Editorial review assesses logical flow and strength of argument, alignment with stated objectives and outcomes, accuracy of data and references, and clarity for intended audiences such as funders, academic stakeholders, or community partners. All revisions are tracked through version control protocols to maintain transparency and document the evolution of key decisions. Editorial reviews also confirm adherence to client style guides, branding standards, and formatting requirements (when provided), as well as alignment with funder submission guidelines, page limits, and



compliance requirements. Consistency in terminology, voice, citation practices, and data presentation is systematically verified.

IV.B.18.2. Structured Review Cycles

Substantive deliverables undergo structured review cycles designed to ensure both technical accuracy and strategic alignment. These cycles typically include an initial author draft, internal peer review focused on content accuracy and clarity, senior-level review to confirm alignment with project strategy and client objectives, and client review when appropriate. For projects requiring specialized expertise, external subject matter experts may be engaged to provide additional validation.

IV.B.18.3. Technical Quality Assurance

For digital products, data systems, dashboards, web-based materials, or interactive tools, we implement technical QA protocols appropriate to the project scope. These processes may include functionality testing to confirm that tools operate as intended, cross-browser and cross-device compatibility checks, validation of data integrity and calculation logic, link and media verification, and confirmation that deliverables meet required file formats for submission systems or institutional platforms. When possible, tools are tested within the environments in which they will ultimately be deployed to reduce implementation risk.

IV.B.18.4. Accessibility Quality Assurance

Accessibility and inclusive design are integrated into our quality assurance processes to ensure that deliverables are usable by diverse audiences. Materials are developed consistent with the POUR standards (see section B10) and incorporate accessibility-aware formatting, document structure, and visual design practices. When specialized design or technical expertise is required, we collaborate with partners experienced in accessibility compliance.

IV.B.18.5. Methodological Quality Assurance

Methodological rigor is central to our work in research design, evaluation, and interdisciplinary scholarship support. We systematically review research and evaluation approaches to ensure they align with the project's research questions, intended outcomes, and decision-making needs while remaining feasible within available resources and timelines. Methodological QA may include peer review of study design and data collection instruments, validation of logic models and outcome frameworks, review of sampling strategies for appropriateness and representativeness, and verification that analytic approaches are well matched to research questions. We also assess ethical considerations and compliance requirements, including IRB alignment, data privacy protections, and data management protocols. When projects involve complex or specialized methodologies, we engage additional subject matter experts to strengthen rigor and validity.

IV.B.18.6. Continuous Improvement



Quality assurance is treated as an ongoing management function rather than a single review step. QA reviews are incorporated at key project milestones, feedback and revisions are documented, and lessons learned are carried forward into subsequent phases of work. Periodic internal debriefs allow the team to refine methods, documentation practices, and workflow protocols.

Our layered approach to quality assurance—combining **editorial precision, technical validation, accessibility compliance, and methodological rigor**—ensures that all deliverables meet high professional standards while remaining aligned with client expectations, funder requirements, and intended outcomes.

IV.B.19. Artifact Organizing and Archiving for Sustainability and Handoff

RFP Requirement: "Explain how your firm organizes and archives project artifacts to enable sustainability and handoff to JMU teams."

As described earlier (see B13), the PLACE Team prioritizes working within client-preferred systems whenever possible. We assume JMU CARE has an established—and preferred—infrastructure for collaboration and document management (e.g., SharePoint, Teams, Google Workspace). To the extent allowable, we will integrate directly into those systems to ensure continuity with university workflows and long-term accessibility of project artifacts.

Our internal system to support project coordination, is Microsoft365. We created dedicated SharePoint workspaces organized into project phases or workstreams. Consistent naming conventions, metadata tagging, and logical folder structures allow us to quickly locate materials without relying on informal knowledge or individual file management practices.

Security and access control are central to our documentation practices. We leverage role-based permissions within Microsoft 365 to ensure that sensitive materials are accessible only to authorized personnel, while broader project resources remain available to appropriate stakeholders. SharePoint's built-in version control and audit trail features preserve the integrity of project records by logging document revisions and enabling recovery of previous versions when needed. For real-time collaboration, Microsoft Teams channels can be linked directly to SharePoint libraries, allowing team members to co-author documents, participate in threaded discussions, and manage shared files within a unified workspace.

At the same time, we maintain **platform-agnostic documentation practices** to support long-term sustainability and institutional handoff. All project artifacts are produced in widely compatible formats (e.g., .docx, .xlsx, .pdf, .csv), ensuring that deliverables can be easily transferred to JMU systems and archived according to university policies. This approach ensures that project materials remain accessible, usable, and fully transferable regardless of the collaboration platform used during the engagement.



On a recent project, we configured SharePoint user groups with role-based permissions (e.g., edit vs. view-only access). This allowed all stakeholders to access shared project materials while protecting document integrity and reducing the risk of unintended edits.

IV.B.20. Data Management Plans

RFP Requirement: "Summarize your firm's data management plans (security, privacy, retention, access controls), including how FERPA-adjacent education data and research data management is handled."

The PLACE Team is committed to responsible data stewardship and will work closely with the JMU CARE project officer at project initiation to establish clear protocols governing how project-related data—including education records and research data carrying FERPA-adjacent privacy obligations—is hosted, accessed, and managed. We recognize that universities often prefer to retain primary custody of sensitive data within institutional systems. Accordingly, our default approach is to operate within **JMU-managed environments whenever possible**, accessing data through university-controlled platforms and complying with all institutional data governance policies, security requirements, and access procedures defined by the university (see Sections B13 and B19).

When PLACE is required or requested to host project data independently, we maintain secure infrastructure through Microsoft 365 which supports strong data protection practices including encrypted storage and transmission, role-based access controls, and activity logging. Within these environments, data are classified by sensitivity level, with personally identifiable information (PII) and education-related records subject to the most restrictive access controls and limited to staff with a documented need to perform project duties. In all cases, data shared with our firm are used solely for the purposes defined in the project scope and are never disclosed to third parties without explicit authorization.

Our approach to data retention, privacy, and disposition is established collaboratively with the client and aligned with institutional requirements. At the outset of the project, we work with the JMU CARE project officer to define a **data retention and disposition plan** specifying how long different categories of data will be retained, where they will be stored, and the procedures for returning, transferring, archiving, or securely destroying data at the close of the project. For research and evaluation activities, we follow data management practices consistent with **federal sponsor expectations and institutional research policies**, including maintaining documentation needed for replication, audit, and compliance when required. At the same time, we ensure that data with no ongoing programmatic or compliance value are securely disposed of according to established retention schedules. Throughout the project lifecycle, we periodically review our data management practices to confirm alignment with FERPA requirements, applicable state privacy laws, and any additional institutional guidance provided by JMU.

Whether serving as a temporary data host or as an authorized user of university-managed data, PLACE is committed to functioning as a **responsible steward of institutional information**, aligning our practices with university governance frameworks while maintaining rigorous internal standards for data security, privacy, and ethical research conduct.



IV.B.21. IRB Processes and Responsible Conduct of Research Training

RFP Requirement: "Describe your firm's familiarity with IRB processes and responsible conduct of research training for staff supporting data collection/evaluation."

The PLACE Team has extensive experience navigating Institutional Review Board (IRB) processes and responsible conduct of research requirements across PreK–12 education, postsecondary, and workforce development contexts. We have supported IRB submissions for studies with populations including children, adults, individuals with disabilities, and workforce participants.



Our research frequently involves populations requiring heightened ethical safeguards—including children and youth, individuals with disabilities, English language learners, and adults participating in workforce programs. Because these populations are considered particularly vulnerable under human subjects protection frameworks, we design studies with appropriate safeguards such as accessible consent and assent procedures, clear communication protocols, and strong confidentiality protections. We also ensure these protections are clearly documented in IRB submissions to demonstrate that study designs minimize risk, support participant comprehension, and comply with institutional and federal standards for ethical research with vulnerable populations.

Our IRB-related work includes preparation of research protocols, recruitment materials, consent and assent forms, data collection instruments, and data security and confidentiality plans, as well as submission amendments when research plans evolve. We have collaborated with university IRB offices, state and local education agencies, and district research review bodies to ensure research activities comply with institutional, state, and federal requirements, including coordination of data use agreements and agency-specific approval processes.

The PLACE Team is familiar with the distinctions among **exempt**, **expedited**, and **full board review**, and we incorporate anticipated IRB timelines into project work plans to prevent delays. No data collection activities are initiated prior to required approvals. When appropriate, we also work with qualified external IRB review organizations to provide independent ethical oversight.

IV.B.21.1. Responsible Conduct of Research Training

All PLACE staff supporting data collection and evaluation activities receive training in human subjects' protections and responsible conduct of research. Proposed lead staff have completed formal **CITI Human Subjects Research training**, and we reinforce these principles through structured internal preparation prior to fieldwork. For projects involving human subjects, the team conducts internal briefings to review approved study protocols, consent procedures, confidentiality safeguards, documentation standards, and procedures



for addressing deviations or unanticipated issues. Staff training also emphasizes methodological rigor, including appropriate instrument development, bias-aware interviewing and facilitation techniques, sampling strategies aligned with research questions, and data quality control practices.

Responsible conduct is treated as both an **ethical and methodological commitment**. Our approach emphasizes protection of participant welfare alongside analytic integrity, ensuring that data are collected, managed, analyzed, and reported in ways that are transparent, accurate, and replicable. At the direction of the JMU CARE project officer, we will confirm applicable IRB requirements, determine the appropriate level of review, assist with preparation of submissions when needed, and coordinate with the appropriate review entity to secure approval prior to initiating any research activities involving human subjects.

IV.B.22. Hosted Solutions and Storage

RFP Requirement: "If proposing hosted solutions or storage, describe environments, backup/DR, encryption, and admin controls; include optional costs."

The PLACE Team is **not proposing** a dedicated hosted solution, custom application environment, or separate storage infrastructure as part of this engagement; therefore, no additional hosting, backup, or disaster recovery costs are included.

Consistent with our data management approach described in Section B20, we will align with JMU's preferences regarding data custody and will operate within JMU-managed systems whenever possible. If PLACE is required to temporarily store project data, it would occur within our secure Microsoft 365 / SharePoint environment, which includes encrypted storage, role-based access controls, multi-factor authentication, and audit logging. All project data ownership and long-term custody will remain with JMU, and data will be transferred or securely disposed of at project closeout according to agreed retention protocols. If future project needs require a dedicated hosted solution or specialized storage environment, **associated technical requirements and costs would be defined and negotiated with JMU at that time.**

IV.B.23. Risk Identification and Mitigation Strategies

RFP Requirement: "Identify typical risks and your mitigation strategies. Provide a sample risk register."

As described in response to B12, our team treats risk management as a **proactive, structured, and collaborative process** rather than a reactive one. At the outset of each task, we work with JMU CARE to identify risks most relevant to the scope of work and document them in a shared risk register that is reviewed and updated at regular intervals with the JMU project officer. Risks are assessed based on both likelihood of occurrence and potential impact, allowing the team to prioritize mitigation strategies and allocate attention appropriately. Project leads monitor risk indicators throughout the engagement and escalate concerns to both PLACE leadership and JMU CARE promptly and transparently.

Common risks in university-based engagements include stakeholder availability, data access or IRB-related delays (especially if engaging partners with additional IRB processes, such as large school districts), shifting institutional priorities, personnel transitions, grant



deadline pressures, and the logistical complexity of coordinating activities across faculty and staff with competing demands. For each category, we apply practical mitigation strategies—such as incorporating schedule buffers around IRB timelines, identifying backup points of contact, and designing activities with flexible participation options—while tailoring risk planning to the specific context of the engagement. By identifying risks early and managing them collaboratively, we help protect project timelines, maintain quality, and safeguard the university's investment. A sample risk register is below:

#	Risk Description <i>Category</i>	Likelihood	Impact	Risk level	Mitigation strategy	Owner
1	JMU faculty leading project departs the university <i>Engagement/ Leadership</i>	Medium	High	High	Identify secondary leads; document decision making authority; address schedule changes	Both
2	IRB review takes longer than expected, delays to data collection start <i>Compliance</i>	High	High	High	Submit IRB materials early, build 4-6 week buffer into data collection, consult with IRB office during planning	PLACE lead / JMU consult
3	Limited faculty or staff participation in evaluation activities (e.g., surveys, interviews, focus groups, or feedback sessions) <i>Data Collection</i>	Medium	High	Medium	Design evaluation activities that minimize participant burden and align with existing	Both



#	Risk Description <i>Category</i>	Likelihood	Impact	Risk level	Mitigation strategy	Owner
					institutional processes or convenings	

IV.B.24. Project Start-Up and Wind-Down

RFP Requirement: "Describe your plan for project start-up and wind-down, including transfer of knowledge, files, and documentation to JMU to support sustainability."

Our approach to project start-up and wind-down aligns with the project management, documentation, quality assurance, and data governance frameworks described earlier in this proposal (see Sections B12, B18–B20). These phases are designed to activate the systems that guide project implementation and to ensure that, at project close, materials, knowledge, and processes are fully transferred and sustainable within JMU CARE.

Project Start-Up: Activating Project Systems

At project initiation, we convene a formal kick-off meeting with the JMU CARE project officer and relevant stakeholders to confirm project goals, scope, deliverables, and communication protocols. This meeting also clarifies decision authority, reporting expectations, and coordination processes across participating units. As outlined in Section B12, we then operationalize the project's core management systems, including the detailed work plan, milestone schedule, and risk monitoring framework. These systems ensure that responsibilities, timelines, and review points are clearly established from the outset. Consistent with the documentation practices described in Section B19, a project workspace is established within the agreed collaboration platform to support organized documentation, version control, and transparent access to project materials for all authorized participants.

Project Wind-Down: Transition and Sustainability

Because documentation, quality review, and data governance practices are embedded throughout the engagement, project closeout focuses on structured consolidation and transition rather than reconstruction. At the conclusion of each project, we will work with the JMU CARE project officer to confirm completion of deliverables and to organize project documentation for continued institutional use. As described in Section B19, project artifacts are maintained in an organized structure designed to support long-term accessibility within JMU's systems. We also conduct knowledge transfer activities to reinforce institutional capacity, such as closeout briefings summarizing key outcomes



and lessons learned, walkthroughs of tools or frameworks developed during the engagement, and documentation of processes or workflow improvements implemented during the project. We also verify applicable retention requirements, returning or securely disposing of sensitive data as required, and ensuring that any IRB or regulatory obligations have been satisfied.

Through this coordinated start-up and closeout process, PLACE ensures that projects launch with clarity, operate within well-defined systems, and conclude with a complete and sustainable transition of knowledge and materials to JMU CARE.

IV.B.25. Identifying, Escalating, and Resolving Issues

RFP Requirement: "Describe your approach to identifying, escalating, and resolving issues or defects that arise during the project or within project deliverables."

Our approach to issue and defect management complements the proactive risk management framework described in Section B12. While risk management focuses on identifying and mitigating anticipated vulnerabilities, this process governs how we address issues or defects that arise during project implementation or within deliverables. Our approach emphasizes early detection, structured escalation, transparent communication, and documented resolution, ensuring that issues are addressed quickly without compromising project quality or timelines.

Issues may arise in several forms, including missed or at-risk milestones, inconsistencies in deliverables, technical functionality errors, data integrity concerns, or misalignment between deliverables and project objectives. These issues are typically identified through the project management and quality assurance systems described earlier in this proposal—including milestone reviews and schedule monitoring (Section B12), structured QA checkpoints across editorial, technical, accessibility, and methodological dimensions (Section B18), ongoing status meetings and deliverable review cycles (Section B13), and stakeholder feedback. These integrated monitoring practices allow most issues to be detected early, before they affect timelines, compliance, or overall project performance. Once identified, issues are assessed to determine their severity, potential impact on timeline, scope, budget, or compliance, and likely root cause (e.g., process gaps, communication breakdowns, technical defects, or resource constraints). This assessment allows the team to prioritize corrective actions while ensuring that minor issues are addressed efficiently and more significant concerns receive appropriate attention.

Consistent with the communication and governance practices outlined in Section B13, we apply a tiered escalation model. Minor issues that can be resolved within the project team are addressed through internal corrective action. Issues that may affect timelines, deliverable quality, or project coordination are elevated to the project lead or designated point of contact for review and corrective planning. If an issue has potential implications for contractual commitments, compliance requirements, or major deliverables, we promptly communicate with the JMU project officer and, when appropriate, relevant stakeholders to outline the issue, proposed resolution, and any adjustments required. Corrective actions are tailored to the nature of the issue and may include deliverable revision, additional QA



review, technical remediation and retesting, adjustments to workflow or staffing allocation, clarification of requirements, or targeted process improvements. For methodological or data-related concerns, corrective actions may include reanalysis, instrument refinement, or additional validation steps when appropriate.



Example in Action: During the recent development of a data dashboard, a QA reviewer noticed that some of the figures displayed did not appear to align with expected totals and patterns in the underlying data. While the discrepancy was not immediately traceable to a specific error, the reviewer flagged the issue and worked collaboratively with the data analyst and dashboard developer to investigate. Together, they reviewed the data, formulas, and aggregation logic, ultimately identifying a calculation issue that required correction. Resolving the issue required additional time, which we communicated transparently to the client. After correcting the formula and rechecking the outputs against the source dataset, the team confirmed the accuracy of the dashboard and released the updated version. This collaborative verification process ensured that the final product reflected reliable data and reinforced trust.

Where patterns or recurring issues are identified, the team conducts brief internal reviews to determine whether workflow, QA checkpoints, or documentation practices should be refined. Lessons learned are incorporated into project processes to strengthen quality and prevent recurrence, reinforcing the continuous improvement practices embedded throughout our project management approach.



IV.B.26. Comprehensive Pricing

RFP Requirement: "Provide comprehensive pricing for proposed services in Section X: Pricing Schedule."

PLACE proposes the following fully burdened hourly labor rates. Rates reflect a range, as specific talent may have a different hourly rate than someone else. A single individual also may serve in more than one labor category depending on project needs. On-site services will be billed at the same hourly rate; travel will be billed separately at cost (using federal per diem rates). Project-specific scopes may be priced on a time-and-materials or fixed-fee basis, as mutually agreed.

Labor Categories and Hourly Rates (Zone 2)

Labor Category	Description of Services	Hourly Rate
Principal / Lead Strategist	Strategic leadership; research design oversight; logic model development; executive advising; evaluation oversight; stakeholder facilitation; QA review	\$250-300
Senior Researcher (On-site/Harrisonburg, as needed)	Leads qualitative and mixed-methods research; instrument development; field engagement; report drafting; supports implementation and applied coaching	\$225-300
Grants Specialist	Grant opportunity scanning; concept development; proposal drafting and editing; compliance review; budget narrative support	\$175-290
Methodologist	Advanced research design; sampling strategy; analytic plan development; quasi-experimental and mixed-methods integration; internal methodological QA	\$225-300
Project Manager	Develop work plan and timeline; manage project planning; milestone tracking; workflow mapping; risk monitoring; deliverable coordination; reporting	\$95-125
Data Analyst	Statistical analysis; qualitative coding; data visualization; dashboard development; technical appendices	\$100-175
Communications Lead	Coordinate, deliver and track internal and external messages; manage knowledge	\$95-125



Labor Category	Description of Services	Hourly Rate
	translation; draft executive summaries, practitioner-facing materials, briefing templates; develop dissemination strategy as needed.	
Strategic Planner	Facilitates stakeholder discussions; leads strategy sprints; subject matter expertise to guide interdisciplinary decisions	\$150-200
Other Support Staff	Junior researchers; research assistants/data collectors; administrative support personnel; interpreters/translators; graphic designers; facilitation specialists	\$35-125

Conclusion

The PLACE Team is excited about the opportunity to partner with JMU CARE to support its work advancing interdisciplinary research, strategic initiatives, and evidence-based practice in education and related fields. The approaches described throughout this proposal—spanning grant development, strategic planning, research and evaluation, and capacity building—reflect our commitment to rigorous methods, collaborative engagement, and sustainable institutional impact. We believe our experience working across higher education, government agencies, and community organizations positions us well to contribute to JMU CARE's efforts to expand research partnerships, secure competitive funding, and translate research into meaningful practice and policy. We welcome the opportunity to bring our expertise, networks, and collaborative approach to this partnership and to support JMU CARE's continued growth, innovation, and impact in the years ahead.

References

- Cooperrider, D. L., & Whitney, D. (2005). *Appreciative inquiry: A positive revolution in change*. Berrett-Koehler Publishers.
- Patton, M. Q., & Campbell-Patton, C. E. (2021). *Utilization-focused evaluation* (5th ed.). SAGE Publications.



ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. **QUALIFICATIONS OF OFFEROR:** Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. **YEARS IN BUSINESS:** Indicate the length of time you have been in business providing these types of goods and services.

Years 3 Months 9

3. **REFERENCES:** Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
Dr. Michael Kennedy, UVA	3 years (PLACE)	405 Emmet St. S., Charlottesville, VA 22904	785-760-5816
Ms. Amy Aiello, New Hampshire Dept. of Ed.	3 years (PLACE)	25 Hall St., Concord, NH 03301	603-271-1536
Mr. Neil Marcaccio, East Greenwich School District	1.5 years (PLACE)	111 Peirce St., East Greenwich, RI 02818	401-398-1230
Mr. Dale Batten, VA Dept for Aging and Rehab Services	4 years (Third Sight)	8004 Franklin Farms Dr., Henrico, VA 23229	804-652-3220
Raul Echevarria, Communikids	3 years (Third Sight)	4719 Wisconsin Ave., Washington, DC 20016	202-510-0933

4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

Third Sight, LLC (Dahlia Shaewitz) 6105 Flemington Ct., Capitol Heights, MD 20743

5. **RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA:** Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the CODE OF VIRGINIA, SECTION 2.2-3100 – 3131?

[] YES [x] NO

IF YES, EXPLAIN:

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: Professional Learning and Advocacy Consulting and Evaluating, LLC

Preparer Name: Teri Marx

Date: 3/10/26

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes x No

If yes, certification number: 825614 Certification date: May 4, 2023

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes x No

If yes, certification number: 825614 Certification date: May 4, 2023

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes No

If yes, certification number: Certification date:

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes x No

If yes, certification number: 825614 Certification date: May 4, 2023

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWaMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

Small Business: "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

Woman-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

Minority-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

Micro Business is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT B (CNT'D)

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: SLD-1247

Date Form Completed: 3/10/26

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses for this Proposal and Subsequent Contract

Offeror / Proposer:

PLACE, LLC

Firm

6308 Swan Landing Ct., Burke, VA 22015

Address

Teri Marx

Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)
Third Sight, LLC	Dahlia Shaewitz, 240-795-7070	Pending certification in MD and VA	Grant development, strategic planning	TBD based on negotiated scope	\$0

(Form shall be submitted with proposal and if awarded, a SWaM Sub-contractor Reporting Form shall be submitted to swamreporting@jmu.edu)

RETURN OF THIS PAGE IS REQUIRED

COMMONWEALTH OF VIRGINIA



DEPARTMENT OF SMALL BUSINESS & SUPPLIER DIVERSITY

101 N. 14th Street, 11th Floor
Richmond, VA 23219

PROFESSIONAL LEARNING AND ADVOCACY CONSULTING AND

is a certified Small, Micro, ~~WOMAN-OWNED BUSINESS~~ ^{WOMAN-OWNED BUSINESS} meeting all the eligibility requirements set forth under the Code of Virginia Section 2.2-16.1 et seq. and Administrative Code 7VAC 13-20 et seq.

Certification Number: 825614
Valid Through: May 4, 2028

Accordingly Certified

Willis A. Morris

Willis A. Morris, Director



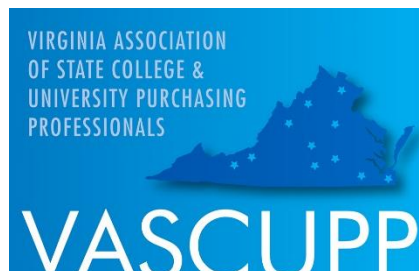


Request for Proposal

RFP# SLD-1247

**Grant Proposal Development and Consulting
Services**

February 12, 2026



REQUEST FOR PROPOSAL

RFP# SLD-1247

Issue Date: February 12, 2026

Title: Grant Proposal Development and Consulting Services

Issuing Agency: Commonwealth of Virginia
James Madison University
Procurement Services MSC 5720
752 Ott Street, Wine Price Building
First Floor, Suite 1023
Harrisonburg, VA 22807

Period of Contract: From Date of Award Through One Year (Renewable)

Sealed Proposals Will Be Received Until 2:00 PM on March 11, 2026 for Furnishing The Services Described Herein. (See Special Terms & Conditions “D. Late Proposals”)

SEALED PROPOSALS MAY BE MAILED, EXPRESS MAILED, SUBMITTED IN eVA, OR HAND DELIVERED DIRECTLY TO THE ISSUING AGENCY SHOWN ABOVE.

All Inquiries For Information And Clarification Should Be Directed To: Shanna Devers, Lead Commodity Contract Officer, Procurement Services, deverssl@jmu.edu; 540-568-3131; (Fax) 540-568-7935 not later than five business days before the proposal closing date.

NOTE: THE SIGNED PROPOSAL AND ALL ATTACHMENTS SHALL BE RETURNED.

In compliance with this Request for Proposal and to all the conditions imposed herein, the undersigned offers and agrees to furnish the goods/services in accordance with the attached signed proposal or as mutually agreed upon by subsequent negotiation.

Name and Address of Firm:

By: _____
(Signature)

Name: _____
(Please Print)

Date: _____

Title: _____

Web Address: _____

Phone: _____

Email: _____

Fax #: _____

ACKNOWLEDGE RECEIPT OF ADDENDUM: #1 _____ #2 _____ #3 _____ #4 _____ #5 _____ (please initial)

SMALL, WOMAN OR MINORITY OWNED BUSINESS:

☐ YES; ☐ NO; *IF YES* ⇒ ☐ SMALL; ☐ WOMAN; ☐ MINORITY ***IF MINORITY:*** ☐ AA; ☐ HA; ☐ AsA; ☐ NW; ☐ Micro

Note: This public body does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against an offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

REQUEST FOR PROPOSAL

RFP # SLD-1247

TABLE OF CONTENTS

I.	PURPOSE	Page	1
II.	BACKGROUND	Page	1
III.	SMALL, WOMAN-OWNED, AND MINORITY PARTICIPATION	Page	1
IV.	STATEMENT OF NEEDS	Page	1-3
V.	PROPOSAL PREPARATION AND SUBMISSION	Page	3-6
VI.	EVALUATION AND AWARD CRITERIA	Page	7
VII.	GENERAL TERMS AND CONDITIONS	Page	7-14
VIII.	SPECIAL TERMS AND CONDITIONS	Page	14-19
IX.	METHOD OF PAYMENT	Page	19
X.	PRICING SCHEDULE	Page	19
XI.	ATTACHMENTS	Page	19
	A. Offeror Data Sheet		
	B. SWaM Utilization Plan		
	C. Sample of Standard Contract		
	D. Zone Map		

I. PURPOSE

The purpose of this Request for Proposal (RFP) is to solicit sealed proposals from qualified sources to enter into a contract to provide Grant Proposal Development and Consulting Services for James Madison University (JMU), an agency of the Commonwealth of Virginia. Initial contract shall be for one (1) year with an option to renew for four (4) additional one-year periods.

II. BACKGROUND

James Madison University (JMU) is a comprehensive public institution in Harrisonburg, Virginia with an enrollment of approximately 23,000 students and approximately 4,000 faculty and staff. There are over 600 individual departments on campus that support seven (7) academic divisions. The University offers over 120 majors, minors, and concentrations. Further information about the University can be found at the following website: www.jmu.edu.

The JMU Center for Advancement Research in Education (JMU CARE™), housed in the College of Education (COE), advances interdisciplinary, evidence-based research and practice focused on equitable, high-quality early childhood development through the lifespan. CARE convenes faculty, staff, student, educators, families, and community partners to investigate challenges, develop interventions, and inform policy and practice through research, training, and dissemination.

III. SMALL, WOMAN-OWNED AND MINORITY PARTICIPATION

It is the policy of the Commonwealth of Virginia to contribute to the establishment, preservation, and strengthening of small businesses and businesses owned by women and minorities, and to encourage their participation in State procurement activities. The Commonwealth encourages contractors to provide for the participation of small businesses and businesses owned by women and minorities through partnerships, joint ventures, subcontracts, and other contractual opportunities. Attachment B contains information on reporting spend data with subcontractors.

IV. STATEMENT OF NEEDS

- A. James Madison University CARE/COE seeks to engage with a qualified and experienced firm(s) for grant development, strategic thought partnership, capacity building, and project implementation and evaluation. Services include grant proposal development, technical assistance, interdisciplinary research support, and utilization-focused evaluation.
- B. Offerors shall provide a detailed response to the following:
 1. Describe your firm's capacity to deliver the service areas as indicated above. Include team size, core roles, and availability during peak periods.
 2. Describe any prior work with other higher education institutions, highlighting strategic planning, technical assistance, or evaluation engagements.
 3. Summarize your firm's experience forming and sustaining cross-institutional or international partnerships.
 4. Demonstrate your ability to provide a senior researcher based or regularly available in the Harrisonburg, VA area to support on-site data collection.

5. Explain your approach to opportunity scanning, fit assessment, timeline back-planning, and integration with JMU CARE/COE priorities.
6. Describe your processes for narrative drafting, budget creation, compliance crosswalks, and submission support.
7. Detail facilitation techniques for strategy sprints, decision framing, and issue analysis; how will your firm balance constructive critique with capacity building?
8. Outline your approach to strengthening research methods, project management, and knowledge systems. Provide sample curricula and materials.
9. Describe your methods for research design, logic models, instrument development, sampling, IRB readiness, data collection & analysis, and utilization-focused reporting.
10. Explain how your firm ensures accessibility and inclusive design across reports, tools, trainings, and web-based materials integral to project deliverables.
11. Describe how your firm estimates hours for discrete tasks and multi-stream projects, the inputs required from JMU, and your assumptions.
12. Provide your approach to schedule development, milestone tracking, and risk management.
13. Detail the cadence and format of status meetings, progress summaries, and documentation; your collaboration tools and responsiveness standards.
14. Identify key personnel (e.g., Principal/Lead Strategist, Senior Researcher—Harrisonburg/on-site, Grants Specialist, Methodologist, Project Manager, Data Analyst, Communications Lead). Provide resumes and percent allocation.
15. Explain your contingency coverage model for key personnel absences to maintain continuity of deliverables and on-site data collection.
16. Describe ongoing training for project staff assigned to JMU.
17. Provide examples (or anonymized excerpts) of grant narratives, budgets, strategic plans, research designs, logic models, evaluation plans, data instruments, analyses, and visualizations you have produced.
18. Describe your editorial, technical, accessibility, and methodological QA processes.
19. Explain how your firm organizes and archives project artifacts to enable sustainability and handoff to JMU teams.
20. Summarize your firm's data management plans (security, privacy, retention, access controls), including how FERPA-adjacent education data and research data management is handled.
21. Describe your firm's familiarity with IRB processes and responsible conduct of research training for staff supporting data collection/evaluation.

22. If proposing hosted solutions or storage, describe environments, backup/DR, encryption, and admin controls; include optional costs.
23. Identify typical risks and your mitigation strategies. Provide a sample risk register.
24. Describe your plan for project start-up and wind-down, including transfer of knowledge, files, and documentation to JMU to support sustainability.
25. Describe your approach to identifying, escalating, and resolving issues or defects that arise during the project or within project deliverables
26. Provide comprehensive pricing for proposed services in Section X. Pricing Schedule.

V. PROPOSAL PREPARATION AND SUBMISSION

A. GENERAL INSTRUCTIONS

To ensure timely and adequate consideration of your proposal, offerors are to limit all contact, whether verbal or written, pertaining to this RFP to the James Madison University Procurement Office for the duration of this Proposal process. Failure to do so may jeopardize further consideration of Offeror's proposal.

ELECTRONIC OR PAPER SUBMISSIONS MAY BE ACCEPTED FOR THIS PROPOSAL. INSTRUCTIONS BELOW FOR OFFEROR'S CHOSEN METHOD (A. ELECTRONIC SUBMISSION or B. PAPER RESPONSE).

1. RFP Response: In order to be considered for selection, the **Offeror shall submit a complete response to this RFP**; and shall submit to the issuing Purchasing Agency:

a. **ELECTRONIC SUBMISSION:**

- i. ELECTRONIC RESPONSES SUBMITTED THROUGH eVA WILL BE ACCEPTED. **Emailed responses will not be accepted.** Please see below, "eVA Procurement Website and Registration" for additional information on registration. It is the responsibility of the Supplier to ensure their proposal and all required documentation is properly completed, readable, and uploaded to eVA. Suppliers should allow sufficient time to account for any technical difficulties they may encounter during online submission or uploading of the documents. In the event of any technical difficulties, Suppliers shall contact the eVA Customer Care Center at 1-866-289-7367 or via email at eVACustomerCare@DGS.virginia.gov.
- ii. eVA Procurement Website and Registration The Commonwealth's procurement portal, eVA, located at <http://www.eva.virginia.gov>, provides information about Commonwealth solicitations and awards. Suppliers shall be registered in eVA in order submit a proposal to this RFP. To register with eVA, select "Register Now" on the eVA website homepage, <http://www.eva.virginia.gov>. For registration instructions and assistance, as well as instructions on how to submit proposals and accept orders please select "I Sell to Virginia". Suppliers are encouraged to check this site on a regular basis and, in particular, prior to submission of proposals to identify any amendments to the RFP that may have been issued.

- iii. Electronic Responses submitted through eVA shall be in WORD format or searchable PDF of the entire proposal, INCLUDING ALL ATTACHMENTS. PDFs must be submitted in an unlocked format. Any proprietary information should be clearly marked in accordance with Section V.4.f. below.

b. PAPER SUBMISSIONS:

- i. **One (1) original and two (2) copies** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with V.4.e. below.
 - ii. **One (1) electronic copy in WORD format or searchable PDF (CD or flash drive)** of the entire proposal, INCLUDING ALL ATTACHMENTS. Any proprietary information should be clearly marked in accordance with Section V.4.f. below.
 - iii. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
 - iv. See additional information in Section VIII.C, *IDENIFICATION OF PROPSAL ENVELOPE*.
2. Should the proposal contain **proprietary information, provide one (1) redacted copy of the proposal** and all attachments with **proprietary portions removed or blacked out**. This copy should be clearly marked "*Redacted Copy*" on the front cover. The classification of an entire proposal document, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. JMU shall not be responsible for the Contractor's failure to exclude proprietary information from this redacted copy.

No other distribution of the proposal shall be made by the Offeror.

3. The version of the solicitation issued by JMU Procurement Services, as amended by an addenda, is the mandatory controlling version of the document. Any modification of, or additions to, the solicitation by the Offeror shall not modify the official version of the solicitation issued by JMU Procurement services unless accepted in writing by the University. Such modifications or additions to the solicitation by the Offeror may be cause for rejection of the proposal; however, JMU reserves the right to decide, on a case-by-case basis in its sole discretion, whether to reject such a proposal. If the modification or additions are not identified until after the award of the contract, the controlling version of the solicitation document shall still be the official state form issued by Procurement Services.
4. Proposal Preparation
- a. Proposals shall be signed by an authorized representative of the Offeror. All information requested should be submitted. Failure to submit all information requested may result in the purchasing agency requiring prompt submissions of missing information and/or giving a lowered evaluation of the proposal. Proposals which are substantially incomplete or lack key information may be rejected by the purchasing agency. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

- b. Proposals shall be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be placed on completeness and clarity of content.
 - c. Proposals should be organized in the order in which the requirements are presented in the RFP. All pages of the proposal should be numbered. Each paragraph in the proposal should reference the paragraph number of the corresponding section of the RFP. It is also helpful to cite the paragraph number, sub letter, and repeat the text of the requirement as it appears in the RFP. If a response covers more than one page, the paragraph number and sub letter should be repeated at the top of the next page. The proposal should contain a table of contents which cross references the RFP requirements. Information which the offeror desires to present that does not fall within any of the requirements of the RFP should be inserted at the appropriate place or be attached at the end of the proposal and designated as additional material. Proposals that are not organized in this manner risk elimination from consideration if the evaluators are unable to find where the RFP requirements are specifically addressed.
 - d. As used in this RFP, the terms “must”, “shall”, “should” and “may” identify the criticality of requirements. “Must” and “shall” identify requirements whose absence will have a major negative impact on the suitability of the proposed solution. Items labeled as “should” or “may” are highly desirable, although their absence will not have a large impact and would be useful, but are not necessary. Depending on the overall response to the RFP, some individual “must” and “shall” items may not be fully satisfied, but it is the intent to satisfy most, if not all, “must” and “shall” requirements. The inability of an offeror to satisfy a “must” or “shall” requirement does not automatically remove that offeror from consideration; however, it may seriously affect the overall rating of the offeror’s proposal.
 - e. Each copy of the proposal should be bound or contained in a single volume where practical. All documentation submitted with the proposal should be contained in that single volume.
 - f. Ownership of all data, materials and documentation originated and prepared for the State pursuant to the RFP shall belong exclusively to the State and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by the offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, the offeror must invoke the protection of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data is submitted. **The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret materials submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line-item prices and/or total proposal prices as proprietary or trade secrets is not acceptable. Marking an entire proposal as confidential or attempts to prevent disclosure of pricing information by designating it as confidential, proprietary or trade secret will be ignored.**
5. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to James Madison University. This provides an opportunity for the Offeror to clarify or elaborate on the proposal. This is a fact-finding and explanation session only and does not include negotiation. James Madison University

will schedule the time and location of these presentations. Oral presentations are an option of the University and may or may not be conducted. Therefore, proposals should be complete.

B. SPECIFIC PROPOSAL INSTRUCTIONS

Proposals should be as thorough and detailed as possible so that James Madison University may properly evaluate your capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

1. Return RFP cover sheet and all addenda acknowledgements, if any, signed and filled out as required. (Electronic signature shall be accepted, i.e. Adobe Sign, DocuSign, etc.)
2. Plan and methodology for providing the goods/services as described in Section IV. Statement of Needs of this Request for Proposal.
3. A written narrative statement to include, but not be limited to, the expertise, qualifications, and experience of the firm and resumes of specific personnel to be assigned to perform the work.
4. Offeror Data Sheet, included as *Attachment A* to this RFP.
5. Small Business Subcontracting Plan, included as *Attachment B* to this RFP. Offeror shall provide a Small Business Subcontracting plan which summarizes the planned utilization of Department of Small Business and Supplier Diversity (SBSD)-certified small businesses which include businesses owned by women and minorities, when they have received Department of Small Business and Supplier Diversity (SBSD) small business certification, under the contract to be awarded as a result of this solicitation. This is a requirement for all prime contracts in excess of \$100,000 unless no subcontracting opportunities exist.
6. Identify the amount of sales your company had during the last twelve months with each VASCUPP Member Institution. A list of VASCUPP Members can be found at: www.VASCUPP.org.
7. Proposed Cost. See Section X. Pricing Schedule of this Request for Proposal.

VI. EVALUATION AND AWARD CRITERIA

A. EVALUATION CRITERIA

Proposals shall be evaluated by James Madison University using the following criteria:

	Points
1. Quality of products/services offered and suitability for intended purposes	30
2. Qualifications and experience of Offeror in providing the goods/services	25
3. Specific plans or methodology to be used to perform the services	20
4. Participation of Small, Women-Owned, & Minority (SWaM) Businesses	10
5. Cost	15
	100

- B. AWARD TO MULTIPLE OFFERORS: Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals on the basis of the evaluation factors included in the Request for Proposals, including price, if so stated in the Request for Proposals. Negotiations shall be conducted with the offerors so selected. Price shall be considered, but need not be the sole determining factor. After negotiations have been conducted with each offeror so selected, the agency shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror. The Commonwealth reserves the right to make multiple awards as a result of this solicitation. The Commonwealth may cancel this Request for Proposals or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous. Should the Commonwealth determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The award document will be a contract incorporating by reference all the requirements, terms and conditions of the solicitation and the contractor's proposal as negotiated.

VII. GENERAL TERMS AND CONDITIONS

- A. PURCHASING MANUAL: This solicitation is subject to the provisions of the Commonwealth of Virginia's Purchasing Manual for Institutions of Higher Education and Their Vendors and any revisions thereto, which are hereby incorporated into this contract in their entirety. A copy of the manual is available for review at the purchasing office. In addition, the manual may be accessed electronically at <http://www.jmu.edu/procurement> or a copy can be obtained by calling Procurement Services at (540) 568-3145.
- B. APPLICABLE LAWS AND COURTS: This solicitation and any resulting contract shall be governed in all respects by the laws of the Commonwealth of Virginia and any litigation with respect thereto shall be brought in the courts of the Commonwealth. The Contractor shall comply with applicable federal, state and local laws and regulations.
- C. ANTI-DISCRIMINATION: By submitting their proposals, offerors certify to the Commonwealth that they will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians With Disabilities Act, the Americans With

Disabilities Act and §10 of the Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 (available for review at <http://www.jmu.edu/procurement>). If the award is made to a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender, sexual orientation, gender identity, or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds provided; however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (*§6 of the Rules Governing Procurement*).

In every contract over \$10,000 the provisions in 1. and 2. below apply:

1. During the performance of this contract, the contractor agrees as follows:
 - a. The contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the contractor. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
 - b. The contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such contractor is an equal opportunity employer.
 - c. Notices, advertisements, and solicitations placed in accordance with federal law, rule, or regulation shall be deemed sufficient for the purpose of meeting these requirements.
 2. The contractor will include the provisions of 1. above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.
- D. ETHICS IN PUBLIC CONTRACTING: By submitting their proposals, offerors certify that their proposals are made without collusion or fraud and that they have not offered or received any kickbacks or inducements from any other offeror, supplier, manufacturer or subcontractor in connection with their proposal, and that they have not conferred on any public employee having official responsibility for this procurement transaction any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal value, present or promised, unless consideration of substantially equal or greater value was exchanged.
- E. IMMIGRATION REFORM AND CONTROL ACT OF 1986: By entering into a written contract with the Commonwealth of Virginia, the Contractor certifies that the Contractor does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the federal Immigration Reform and Control Act of 1986.
- F. DEBARMENT STATUS: By submitting their proposals, offerors certify that they are not currently debarred by the Commonwealth of Virginia from submitting proposals on contracts for the type of goods and/or services covered by this solicitation, nor are they an agent of any person or entity that is currently so debarred.

- G. ANTITRUST: By entering into a contract, the contractor conveys, sells, assigns, and transfers to the Commonwealth of Virginia all rights, title and interest in and to all causes of action it may now have or hereafter acquire under the antitrust laws of the United States and the Commonwealth of Virginia, relating to the particular goods or services purchased or acquired by the Commonwealth of Virginia under said contract.
- H. MANDATORY USE OF STATE FORM AND TERMS AND CONDITIONS RFPs: Failure to submit a proposal on the official state form provided for that purpose may be a cause for rejection of the proposal. Modification of or additions to the General Terms and Conditions of the solicitation may be cause for rejection of the proposal; however, the Commonwealth reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal.
- I. CLARIFICATION OF TERMS: If any prospective offeror has questions about the specifications or other solicitation documents, the prospective offeror should contact the buyer whose name appears on the face of the solicitation no later than five working days before the due date. Any revisions to the solicitation will be made only by addendum issued by the buyer.
- J. PAYMENT:
1. To Prime Contractor:
 - a. Invoices for items ordered, delivered and accepted shall be submitted by the contractor directly to the payment address shown on the purchase order/contract. All invoices shall show the state contract number and/or purchase order number; social security number (for individual contractors) or the federal employer identification number (for proprietorships, partnerships, and corporations).
 - b. Any payment terms requiring payment in less than 30 days will be regarded as requiring payment 30 days after invoice or delivery, whichever occurs last. This shall not affect offers of discounts for payment in less than 30 days, however.
 - c. All goods or services provided under this contract or purchase order, that are to be paid for with public funds, shall be billed by the contractor at the contract price, regardless of which public agency is being billed.
 - d. The following shall be deemed to be the date of payment: the date of postmark in all cases where payment is made by mail, or the date of offset when offset proceedings have been instituted as authorized under the Virginia Debt Collection Act.
 - e. Unreasonable Charges. Under certain emergency procurements and for most time and material purchases, final job costs cannot be accurately determined at the time orders are placed. In such cases, contractors should be put on notice that final payment in full is contingent on a determination of reasonableness with respect to all invoiced charges. Charges which appear to be unreasonable will be researched and challenged, and that portion of the invoice held in abeyance until a settlement can be reached. Upon determining that invoiced charges are not reasonable, the Commonwealth shall promptly notify the contractor, in writing, as to those charges which it considers unreasonable and the basis for the determination. A contractor may not institute legal action

unless a settlement cannot be reached within thirty (30) days of notification. The provisions of this section do not relieve an agency of its prompt payment obligations with respect to those charges which are not in dispute (*Rules Governing Procurement, Chapter 2, Exhibit J, Attachment 1 § 53; available for review at <http://www.jmu.edu/procurement>*).

2. To Subcontractors:
 - a. A contractor awarded a contract under this solicitation is hereby obligated:
 - (1) To pay the subcontractor(s) within seven (7) days of the contractor's receipt of payment from the Commonwealth for the proportionate share of the payment received for work performed by the subcontractor(s) under the contract; or
 - (2) To notify the agency and the subcontractors, in writing, of the contractor's intention to withhold payment and the reason.
 - b. The contractor is obligated to pay the subcontractor(s) interest at the rate of one percent per month (unless otherwise provided under the terms of the contract) on all amounts owed by the contractor that remain unpaid seven (7) days following receipt of payment from the Commonwealth, except for amounts withheld as stated in (2) above. The date of mailing of any payment by U. S. Mail is deemed to be payment to the addressee. These provisions apply to each sub-tier contractor performing under the primary contract. A contractor's obligation to pay an interest charge to a subcontractor may not be construed to be an obligation of the Commonwealth.
 3. Each prime contractor who wins an award in which provision of a SWAM procurement plan is a condition to the award, shall deliver to the contracting agency or institution, on or before request for final payment, evidence and certification of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the SWAM procurement plan. Final payment under the contract in question may be withheld until such certification is delivered and, if necessary, confirmed by the agency or institution, or other appropriate penalties may be assessed in lieu of withholding such payment.
 4. The Commonwealth of Virginia encourages contractors and subcontractors to accept electronic and credit card payments.
- K. PRECEDENCE OF TERMS: Paragraphs A through J of these General Terms and Conditions and the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors, shall apply in all instances. In the event there is a conflict between any of the other General Terms and Conditions and any Special Terms and Conditions in this solicitation, the Special Terms and Conditions shall apply.
- L. QUALIFICATIONS OF OFFERORS: The Commonwealth may make such reasonable investigations as deemed proper and necessary to determine the ability of the offeror to perform the services/furnish the goods and the offeror shall furnish to the Commonwealth all such information and data for this purpose as may be requested. The Commonwealth reserves the right to inspect offeror's physical facilities prior to award to satisfy questions regarding the offeror's capabilities. The Commonwealth further reserves the right to reject any proposal if the evidence submitted by, or investigations of, such offeror fails to satisfy the Commonwealth that such offeror is properly qualified to carry out the obligations of the contract and to provide the services and/or furnish the goods contemplated therein.

- M. TESTING AND INSPECTION: The Commonwealth reserves the right to conduct any test/inspection it may deem advisable to assure goods and services conform to the specifications.
- N. ASSIGNMENT OF CONTRACT: A contract shall not be assignable by the contractor in whole or in part without the written consent of the Commonwealth.
- O. CHANGES TO THE CONTRACT: Changes can be made to the contract in any of the following ways:
1. The parties may agree in writing to modify the scope of the contract. An increase or decrease in the price of the contract resulting from such modification shall be agreed to by the parties as a part of their written agreement to modify the scope of the contract.
 2. The Purchasing Agency may order changes within the general scope of the contract at any time by written notice to the contractor. Changes within the scope of the contract include, but are not limited to, things such as services to be performed, the method of packing or shipment, and the place of delivery or installation. The contractor shall comply with the notice upon receipt. The contractor shall be compensated for any additional costs incurred as the result of such order and shall give the Purchasing Agency a credit for any savings. Said compensation shall be determined by one of the following methods:
 - a. By mutual agreement between the parties in writing; or
 - b. By agreeing upon a unit price or using a unit price set forth in the contract, if the work to be done can be expressed in units, and the contractor accounts for the number of units of work performed, subject to the Purchasing Agency's right to audit the contractor's records and/or to determine the correct number of units independently; or
 - c. By ordering the contractor to proceed with the work and keep a record of all costs incurred and savings realized. A markup for overhead and profit may be allowed if provided by the contract. The same markup shall be used for determining a decrease in price as the result of savings realized. The contractor shall present the Purchasing Agency with all vouchers and records of expenses incurred and savings realized. The Purchasing Agency shall have the right to audit the records of the contractor as it deems necessary to determine costs or savings. Any claim for an adjustment in price under this provision must be asserted by written notice to the Purchasing Agency within thirty (30) days from the date of receipt of the written order from the Purchasing Agency. If the parties fail to agree on an amount of adjustment, the question of an increase or decrease in the contract price or time for performance shall be resolved in accordance with the procedures for resolving disputes provided by the Disputes Clause of this contract or, if there is none, in accordance with the disputes provisions of the Commonwealth of Virginia Purchasing Manual for Institutions of Higher Education and their Vendors. Neither the existence of a claim nor a dispute resolution process, litigation or any other provision of this contract shall excuse the contractor from promptly complying with the changes ordered by the Purchasing Agency or with the performance of the contract generally.
- P. DEFAULT: In case of failure to deliver goods or services in accordance with the contract terms and conditions, the Commonwealth, after due oral or written notice, may procure them from other sources and hold the contractor responsible for any resulting additional purchase and administrative costs. This remedy shall be in addition to any other remedies which the Commonwealth may have.

- Q. **INSURANCE:** By signing and submitting a proposal under this solicitation, the offeror certifies that if awarded the contract, it will have the following insurance coverage at the time the contract is awarded. For construction contracts, if any subcontractors are involved, the subcontractor will have workers' compensation insurance in accordance with § 25 of the Rules Governing Procurement – Chapter 2, Exhibit J, Attachment 1, and 65.2-800 et. Seq. of the Code of Virginia (available for review at <http://www.jmu.edu/procurement>) The offeror further certifies that the contractor and any subcontractors will maintain these insurance coverage during the entire term of the contract and that all insurance coverage will be provided by insurance companies authorized to sell insurance in Virginia by the Virginia State Corporation Commission.

MINIMUM INSURANCE COVERAGES AND LIMITS REQUIRED FOR MOST CONTRACTS:

1. **Workers' Compensation:** Statutory requirements and benefits. Coverage is compulsory for employers of three or more employees, to include the employer. Contractors who fail to notify the Commonwealth of increases in the number of employees that change their workers' compensation requirement under the Code of Virginia during the course of the contract shall be in noncompliance with the contract.
 2. **Employer's Liability:** \$100,000
 3. **Commercial General Liability:** \$1,000,000 per occurrence and \$2,000,000 in the aggregate. Commercial General Liability is to include bodily injury and property damage, personal injury and advertising injury, products and completed operations coverage. The Commonwealth of Virginia must be named as an additional insured and so endorsed on the policy.
 4. **Automobile Liability:** \$1,000,000 combined single limit. *(Required only if a motor vehicle not owned by the Commonwealth is to be used in the contract. Contractor must assure that the required coverage is maintained by the Contractor (or third party owner of such motor vehicle.)*
- R. **ANNOUNCEMENT OF AWARD:** Upon the award or the announcement of the decision to award a contract over \$100,000, as a result of this solicitation, the purchasing agency will publicly post such notice on the DGS/DPS eVA web site (www.eva.virginia.gov) for a minimum of 10 days.
- S. **DRUG-FREE WORKPLACE:** During the performance of this contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

- T. NONDISCRIMINATION OF CONTRACTORS: An offeror, or contractor shall not be discriminated against in the solicitation or award of this contract because of race, religion, color, sex, sexual orientation, gender identity, national origin, age, disability, faith-based organizational status, any other basis prohibited by state law relating to discrimination in employment or because the offeror employs ex-offenders unless the state agency, department or institution has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If the award of this contract is made to a faith-based organization and an individual, who applies for or receives goods, services, or disbursements provided pursuant to this contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his objection, access to equivalent goods, services, or disbursements from an alternative provider.
- U. eVA BUSINESS TO GOVERNMENT VENDOR REGISTRATION, CONTRACTS, AND ORDERS: The eVA Internet electronic procurement solution, website portal www.eVA.virginia.gov, streamlines and automates government purchasing activities in the Commonwealth. The eVA portal is the gateway for vendors to conduct business with state agencies and public bodies. All vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet eprocurement solution by completing the free eVA Vendor Registration. All offerors must register in eVA and pay the Vendor Transaction Fees specified below; failure to register will result in the proposal being rejected. Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:
- Vendor transaction fees are determined by the date the original purchase order is issued and the current fees are as follows:
1. For orders issued July 1, 2014 and after, the Vendor Transaction Fee is:
 - a. Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$500 per order.
 - b. Businesses that are not Department of Small Business and Supplier Diversity (SBSD) certified Small Businesses: 1% capped at \$1,500 per order.
 2. For orders issued prior to July 1, 2014 the vendor transaction fees can be found at www.eVA.virginia.gov.
 3. The specified vendor transaction fee will be invoiced by the Commonwealth of Virginia Department of General Services approximately 60 days after the corresponding purchase order is issued and payable 30 days after the invoice date. Any adjustments (increases/decreases) will be handled through purchase order changes.
- V. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the Commonwealth of Virginia shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- W. PRICING CURRENCY: Unless stated otherwise in the solicitation, offerors shall state offered prices in U.S. dollars.
- X. E-VERIFY REQUIREMENT OF ANY CONTRACTOR: Any employer with more than an average of 50 employees for the previous 12 months entering into a contract in excess of

\$50,000 with James Madison University to perform work or provide services pursuant to such contract shall register and participate in the E-Verify program to verify information and work authorization of its newly hired employees performing work pursuant to any awarded contract.

- Y. CIVILITY IN STATE WORKPLACES: The contractor shall take all reasonable steps to ensure that no individual, while performing work on behalf of the contractor or any subcontractor in connection with this agreement (each, a “Contract Worker”), shall engage in 1) harassment (including sexual harassment), bullying, cyber-bullying, or threatening or violent conduct, or 2) discriminatory behavior on the basis of race, sex, color, national origin, religious belief, sexual orientation, gender identity or expression, age, political affiliation, veteran status, or disability.

The contractor shall provide each Contract Worker with a copy of this Section and will require Contract Workers to participate in training on civility in the State workplace. Upon request, the contractor shall provide documentation that each Contract Worker has received such training.

For purposes of this Section, “State workplace” includes any location, permanent or temporary, where a Commonwealth employee performs any work-related duty or is representing his or her agency, as well as surrounding perimeters, parking lots, outside meeting locations, and means of travel to and from these locations. Communications are deemed to occur in a State workplace if the Contract Worker reasonably should know that the phone number, email, or other method of communication is associated with a State workplace or is associated with a person who is a State employee.

The Commonwealth of Virginia may require, at its sole discretion, the removal and replacement of any Contract Worker who the Commonwealth reasonably believes to have violated this Section.

This Section creates obligations solely on the part of the contractor. Employees or other third parties may benefit incidentally from this Section and from training materials or other communications distributed on this topic, but the Parties to this agreement intend this Section to be enforceable solely by the Commonwealth and not by employees or other third parties.

VIII. SPECIAL TERMS AND CONDITIONS

- A. AUDIT: The Contractor hereby agrees to retain all books, records, systems, and other documents relative to this contract for five (5) years after final payment, or until audited by the Commonwealth of Virginia, whichever is sooner. The Commonwealth of Virginia, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- B. CANCELLATION OF CONTRACT: James Madison University reserves the right to cancel and terminate any resulting contract, in part or in whole, without penalty, upon 60 days written notice to the contractor. In the event the initial contract period is for more than 12 months, the resulting contract may be terminated by either party, without penalty, after the initial 12 months of the contract period upon 60 days written notice to the other party. Any contract cancellation notice shall not relieve the contractor of the obligation to deliver and/or perform on all outstanding orders issued prior to the effective date of cancellation.
- C. IDENTIFICATION OF PROPOSAL ENVELOPE: The signed proposal should be returned in a separate envelope or package, sealed and identified as follows:

From:			
	Name of Offeror	Due Date	Time
	Street or Box No.	RFP #	
	City, State, Zip Code	RFP Title	
Name of Purchasing Officer:			

The envelope should be addressed as directed on the title page of the solicitation.

The Offeror takes the risk that if the envelope is not marked as described above, it may be inadvertently opened and the information compromised, which may cause the proposal to be disqualified. Proposals may be hand-delivered to the designated location in the office issuing the solicitation. No other correspondence or other proposals should be placed in the envelope.

- D. **LATE PROPOSALS:** To be considered for selection, proposals must be received by the issuing office by the designated date and hour. The official time used in the receipt of proposals is that time on the automatic time stamp machine in the issuing office. Proposals received in the issuing office after the date and hour designated are automatically non responsive and will not be considered. The University is not responsible for delays in the delivery of mail by the U.S. Postal Service, private couriers, or the intra university mail system. It is the sole responsibility of the Offeror to ensure that its proposal reaches the issuing office by the designated date and hour.
- E. **UNDERSTANDING OF REQUIREMENTS:** It is the responsibility of each offeror to inquire about and clarify any requirements of this solicitation that is not understood. The University will not be bound by oral explanations as to the meaning of specifications or language contained in this solicitation. Therefore, all inquiries deemed to be substantive in nature must be in writing and submitted to the responsible buyer in the Procurement Services Office. Offerors must ensure that written inquiries reach the buyer at least five (5) days prior to the time set for receipt of offerors proposals. A copy of all queries and the respective response will be provided in the form of an addendum to all offerors who have indicated an interest in responding to this solicitation. Your signature on your Offer certifies that you fully understand all facets of this solicitation. These questions may be sent via email directly to the Procurement Officer listed on the signature page of this solicitation or by Fax to 540/568-7935.
- F. **RENEWAL OF CONTRACT:** This contract may be renewed by the Commonwealth for a period of four (4) successive one year periods under the terms and conditions of the original contract except as stated in 1. and 2. below. Price increases may be negotiated only at the time of renewal. Written notice of the Commonwealth's intention to renew shall be given approximately 90 days prior to the expiration date of each contract period.
1. If the Commonwealth elects to exercise the option to renew the contract for an additional one-year period, the contract price(s) for the additional one year shall not exceed the contract price(s) of the original contract increased/decreased by no more than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.
 2. If during any subsequent renewal periods, the Commonwealth elects to exercise the option to renew the contract, the contract price(s) for the subsequent renewal period shall not exceed the contract price(s) of the previous renewal period increased/decreased by more

than the percentage increase/decrease of the other services category of the CPI-W section of the Consumer Price Index of the United States Bureau of Labor Statistics for the latest twelve months for which statistics are available.

- G. SUBMISSION OF INVOICES: All invoices shall be submitted within sixty days of contract term expiration for the initial contract period as well as for each subsequent contract renewal period. Any invoices submitted after the sixty day period will not be processed for payment.
- H. OPERATING VEHICLES ON JAMES MADISON UNIVERSITY CAMPUS: Operating vehicles on sidewalks, plazas, and areas heavily used by pedestrians is prohibited. In the unlikely event a driver should find it necessary to drive on James Madison University sidewalks, plazas, and areas heavily used by pedestrians, the driver must yield to pedestrians. For a complete list of parking regulations, please go to www.jmu.edu/parking; or to acquire a service representative parking permit, contact Parking Services at 540.568.3300. The safety of our students, faculty and staff is of paramount importance to us. Accordingly, violators may be charged.
- I. COOPERATIVE PURCHASING / USE OF AGREEMENT BY THIRD PARTIES: It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement. Accordingly, any public body, (to include government/state agencies, political subdivisions, etc.), cooperative purchasing organizations, public or private health or educational institutions or any University related foundation and affiliated corporations may access any resulting contract if authorized by the Contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) will be extended to the entities indicated above to purchase goods and services in accordance with contract terms. As a separate contractual relationship, the participating entity will place its own orders directly with the Contractor(s) and shall fully and independently administer its use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the University. No modification of this contract or execution of a separate agreement is required to participate; however, the participating entity and the Contractor may modify the terms and conditions of this contract to accommodate specific governing laws, regulations, policies, and business goals required by the participating entity. Any such modification will apply solely between the participating entity and the Contractor.

The Contractor will notify the University in writing of any such entities accessing this contract. The Contractor will provide semi-annual usage reports for all entities accessing the contract. The University shall not be held liable for any costs or damages incurred by any other participating entity as a result of any authorization by the Contractor to extend the contract. It is understood and agreed that the University is not responsible for the acts or omissions of any entity and will not be considered in default of the contract no matter the circumstances.

Use of this contract(s) does not preclude any participating entity from using other contracts or competitive processes as needed.

- J. SMALL BUSINESS SUBCONTRACTING AND EVIDENCE OF COMPLIANCE:
 - 1. It is the goal of the Commonwealth that 42% of its purchases are made from small businesses. This includes discretionary spending in prime contracts and subcontracts. All potential offerors are required to submit a Small Business Subcontracting Plan. Unless the offeror is registered as a Department of Small Business and Supplier Diversity (SBSD)-certified small business and where it is practicable for any portion of the awarded contract

to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to SBSD-certified small businesses. This shall not exclude SBSD-certified women-owned and minority-owned businesses when they have received SBSD small business certification. No offeror or subcontractor shall be considered a Small Business, a Women-Owned Business or a Minority-Owned Business unless certified as such by the Department of Small Business and Supplier Diversity (SBSD) by the due date for receipt of proposals. If small business subcontractors are used, the prime contractor agrees to report the use of small business subcontractors by providing the purchasing office at a minimum the following information: name of small business with the SBSD certification number or FEIN, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product/service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or swamreporting@jmu.edu .**

2. Each prime contractor who wins an award in which provision of a small business subcontracting plan is a condition of the award, shall deliver to the contracting agency or institution with every request for payment, evidence of compliance (subject only to insubstantial shortfalls and to shortfalls arising from subcontractor default) with the small business subcontracting plan. **This information shall be submitted to: JMU Office of Procurement Services, SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or swamreporting@jmu.edu .** When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm with the Department of Small Business and Supplier Diversity (SBSD) certification number or FEIN number, phone number, total dollar amount subcontracted, category type (small, women-owned, or minority-owned), and type of product or service provided. Payment(s) may be withheld until compliance with the plan is received and confirmed by the agency or institution. The agency or institution reserves the right to pursue other appropriate remedies to include, but not be limited to, termination for default.
 3. Each prime contractor who wins an award valued over \$200,000 shall deliver to the contracting agency or institution with every request for payment, information on use of subcontractors that are not Department of Small Business and Supplier Diversity (SBSD)-certified small businesses. When such business has been subcontracted to these firms and upon completion of the contract, the contractor agrees to furnish the purchasing office at a minimum the following information: name of firm, phone number, FEIN number, total dollar amount subcontracted, and type of product or service provided. **This information shall be submitted to: JMU Office of Procurement Services, Attn: SWAM Subcontracting Compliance, MSC 5720, Harrisonburg, VA 22807 or swamreporting@jmu.edu .**
- K. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the Code of Virginia or as otherwise required by law. Any business entity described above that enters into a contract with a public body shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. A public body may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.

- L. PUBLIC POSTING OF COOPERATIVE CONTRACTS: James Madison University maintains a web-based contracts database with a public gateway access. Any resulting cooperative contract/s to this solicitation will be posted to the publicly accessible website. Contents identified as proprietary information will not be made public.
- M. CRIMINAL BACKGROUND CHECKS OF PERSONNEL ASSIGNED BY CONTRACTOR TO PERFORM WORK ON JMU PROPERTY: The Contractor shall obtain criminal background checks on all of their contracted employees who will be assigned to perform services on James Madison University property. The results of the background checks will be directed solely to the Contractor. The Contractor bears responsibility for confirming to the University contract administrator that the background checks have been completed prior to work being performed by their employees or subcontractors. The Contractor shall only assign to work on the University campus those individuals whom it deems qualified and permissible based on the results of completed background checks. Notwithstanding any other provision herein, and to ensure the safety of students, faculty, staff and facilities, James Madison University reserves the right to approve or disapprove any contract employee that will work on JMU property. Disapproval by the University will solely apply to JMU property and should have no bearing on the Contractor's employment of an individual outside of James Madison University.
- N. INDEMNIFICATION: Contractor agrees to indemnify, defend and hold harmless the Commonwealth of Virginia, its officers, agents, and employees from any claims, damages and actions of any kind or nature, whether at law or in equity, arising from or caused by the use of any materials, goods, or equipment of any kind or nature furnished by the contractor/any services of any kind or nature furnished by the contractor, provided that such liability is not attributable to the sole negligence of the using agency or to failure of the using agency to use the materials, goods, or equipment in the manner already and permanently described by the contractor on the materials, goods or equipment delivered.
- O. ADDITIONAL GOODS AND SERVICES: The University may acquire other goods or services that the supplier provides than those specifically solicited. The University reserves the right, subject to mutual agreement, for the Contractor to provide additional goods and/or services under the same pricing, terms, and conditions and to make modifications or enhancements to the existing goods and services. Such additional goods and services may include other products, components, accessories, subsystems, or related services that are newly introduced during the term of this Agreement. Such additional goods and services will be provided to the University at favored nations pricing, terms, and conditions.
- P. PRIME CONTRACTOR RESPONSIBILITIES: The contractor shall be responsible for completely supervising and directing the work under this contract and all subcontractors that he may utilize, using his best skill and attention. Subcontractors who perform work under this contract shall be responsible to the prime contractor. The contractor agrees that he is as fully responsible for the acts and omissions of his subcontractors and of persons employed by them as he is for the acts and omissions of his own employees.
- Q. SUBCONTRACTS: No portion of the work shall be subcontracted without prior written consent of the purchasing agency. In the event that the contractor desires to subcontract some part of the work specified herein, the contractor shall furnish the purchasing agency the names, qualifications and experience of their proposed subcontractors. The contractor shall, however, remain fully liable and responsible for the work to be done by its subcontractor(s) and shall assure compliance with all requirements of the contract.

- R. **CONFIDENTIALITY OF PERSONALLY IDENTIFIABLE INFORMATION:** The contractor assures that information and data obtained as to personal facts and circumstances related to faculty, staff, students, and affiliates will be collected and held confidential, during and following the term of this agreement, and will not be divulged without the individual's and the agency's written consent and only in accordance with federal law or the Code of Virginia. This shall include FTI, which is a term of art and consists of federal tax returns and return information (*and information derived from it*) that is in contractor/agency possession or control which is covered by the confidentiality protections of the Internal Revenue Code (*IRC*) and subject to the IRC 6103(p)(4) safeguarding requirements including IRS oversight. FTI is categorized as sensitive but unclassified information and may contain personally identifiable information (*PII*). Contractors who utilize, access, or store personally identifiable information as part of the performance of a contract are required to safeguard this information and immediately notify the agency of any breach or suspected breach in the security of such information. Contractors shall allow the agency to both participate in the investigation of incidents and exercise control over decisions regarding external reporting. Contractors and their employees working on this project may be required to sign a confidentiality statement.

IX. METHOD OF PAYMENT

The contractor will be paid based on invoices submitted in accordance with the solicitation and any negotiations. James Madison University recognizes the importance of expediting the payment process for our vendors and suppliers; we request that our vendors and suppliers enroll in our bank's Comprehensive Payable options: either the Virtual Payables Virtual Card or the PayMode-X electronic deposit (ACH) to your bank account so that future payments are made electronically. Contractors signed up for the Virtual Payables process will receive the benefit of being paid Net 15. Additional information is available online at:
<http://www.jmu.edu/financeoffice/accounting-operations-disbursements/cash-investments/vendor-payment-methods.shtml>

X. PRICING SCHEDULE

The offeror shall provide pricing for all products and services included in proposal indicating one-time and on-going costs. The resulting contract will be cooperative and pricing shall be inclusive for the attached Zone Map, of which JMU falls within Zone 2.

1. Contractor shall provide a list of all labor category(ies) and the associated hourly rate(s).
2. Provide all other costs including incidentals, travel, and miscellaneous fees that would apply.

Specify any associated charge card processing fees, if applicable, to be billed to the university.

XI. ATTACHMENTS

Attachment A: Offeror Data Sheet

Attachment B: Small, Women, and Minority-owned Business (SWaM) Utilization Plan

Attachment C: Standard Contract Sample

Attachment D: Zone Map

ATTACHMENT A

OFFEROR DATA SHEET

TO BE COMPLETED BY OFFEROR

1. QUALIFICATIONS OF OFFEROR: Offerors must have the capability and capacity in all respects to fully satisfy the contractual requirements.
2. YEARS IN BUSINESS: Indicate the length of time you have been in business providing these types of goods and services.

Years _____ Months _____

3. REFERENCES: Indicate below a listing of at least five (5) organizations, either commercial or governmental/educational, that your agency is servicing. Include the name and address of the person the purchasing agency has your permission to contact.

CLIENT	LENGTH OF SERVICE	ADDRESS	CONTACT PERSON/PHONE #
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4. List full names and addresses of Offeror and any branch offices which may be responsible for administering the contract.

5. RELATIONSHIP WITH THE COMMONWEALTH OF VIRGINIA: Is any member of the firm an employee of the Commonwealth of Virginia who has a personal interest in this contract pursuant to the [CODE OF VIRGINIA](#), SECTION 2.2-3100 – 3131?

[] YES [] NO

IF YES, EXPLAIN: _____

ATTACHMENT B

Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Offeror Name: _____ **Preparer Name:** _____

Date: _____

Is your firm a **Small Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No _____

If yes, certification number: _____ Certification date: _____

Is your firm a **Woman-owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No _____

If yes, certification number: _____ Certification date: _____

Is your firm a **Minority-Owned Business Enterprise** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No _____

If yes, certification number: _____ Certification date: _____

Is your firm a **Micro Business** certified by the Department of Small Business and Supplier Diversity (SBSD)? Yes _____ No _____

If yes, certification number: _____ Certification date: _____

Instructions: *Populate the table below to show your firm's plans for utilization of small, women-owned and minority-owned business enterprises in the performance of the contract. Describe plans to utilize SWAMs businesses as part of joint ventures, partnerships, subcontractors, suppliers, etc.*

Small Business: "Small business " means a business, independently owned or operated by one or more persons who are citizens of the United States or non-citizens who are in full compliance with United States immigration law, which, together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years.

Woman-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more women, and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified women-owned businesses are also a small business enterprise.**

Minority-Owned Business Enterprise: A business concern which is at least 51 percent owned by one or more minorities or in the case of a corporation, partnership or limited liability company or other entity, at least 51 percent of the equity ownership interest in which is owned by one or more minorities and whose management and daily business operations are controlled by one or more of such individuals. **For purposes of the SWAM Program, all certified minority-owned businesses are also a small business enterprise.**

Micro Business is a certified Small Business under the SWaM Program and has no more than twenty-five (25) employees **AND** no more than \$3 million in average annual revenue over the three-year period prior to their certification.

All small, women, and minority owned businesses must be certified by the Commonwealth of Virginia Department of Small Business and Supplier Diversity (SBSD) to be counted in the SWAM program. Certification applications are available through SBSD at 800-223-0671 in Virginia, 804-786-6585 outside Virginia, or online at <http://www.sbsd.virginia.gov/> (Customer Service).

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT B (CNT'D)
Small, Women and Minority-owned Businesses (SWaM) Utilization Plan

Procurement Name and Number: _____

Date Form Completed: _____

Listing of Sub-Contractors, to include, Small, Woman Owned and Minority Owned Businesses
for this Proposal and Subsequent Contract

Offeror / Proposer: _____

Firm

Address

Contact Person/No.

Sub-Contractor's Name and Address	Contact Person & Phone Number	SBSD Certification Number	Services or Materials Provided	Total Subcontractor Contract Amount (to include change orders)	Total Dollars Paid Subcontractor to date (to be submitted with request for payment from JMU)

(Form shall be submitted with proposal and if awarded, a SWaM Sub-contractor Reporting Form shall be submitted to swamreporting@jmu.edu)

RETURN OF THIS PAGE IS REQUIRED

ATTACHMENT C



COMMONWEALTH OF VIRGINIA
STANDARD CONTRACT

Contract No. _____

This contract entered into this _____ day of _____, 20____, by _____ hereinafter called the "Contractor" and Commonwealth of Virginia, James Madison University called the "Purchasing Agency".

WITNESSETH that the Contractor and the Purchasing Agency, in consideration of the mutual covenants, promises and agreements herein contained, agree as follows:

SCOPE OF CONTRACT: The Contractor shall provide the services to the Purchasing Agency as set forth in the Contract Documents.

PERIOD OF PERFORMANCE: From _____ through _____

The contract documents shall consist of:

- (1) This signed form;
- (2) The following portions of the Request for Proposals dated _____:
 - (a) The Statement of Needs,
 - (b) The General Terms and Conditions,
 - (c) The Special Terms and Conditions together with any negotiated modifications of those Special Conditions;
 - (d) List each addendum that may be issued
- (3) The Contractor's Proposal dated _____ and the following negotiated modification to the Proposal, all of which documents are incorporated herein.
 - (a) Negotiations summary dated _____.

IN WITNESS WHEREOF, the parties have caused this Contract to be duly executed intending to be bound thereby.

CONTRACTOR:

PURCHASING AGENCY:

By: _____
(Signature)

By: _____
(Signature)

(Printed Name)

(Printed Name)

Title: _____

Title: _____

ATTACHMENT D

Zone Map



Virginia Association of State College & University Purchasing Professionals (VASCUPP)

List of member institutions by zones

Zone 1

George Mason University (Fairfax)

Zone 4

University of Mary Washington (Fredericksburg)

Zone 7

Longwood University (Farmville)

Zone 2

James Madison University (Harrisonburg)

Zone 5

Christopher Newport University (Newport News)

College of William and Mary (Williamsburg)

Norfolk State University (Norfolk)

Old Dominion University (Norfolk)

Zone 8

Virginia Military Institute (Lexington)

Virginia Tech (Blacksburg)

Radford University (Radford)

Zone 3

University of Virginia (Charlottesville)

Zone 6

Virginia Commonwealth University (Richmond)

Virginia State University (Petersburg)

Zone 9

University of Virginia - Wise (Wise)



February 23, 2026

ADDENDUM NO.: ONE

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# SLD-1247**
Dated: **February 12, 2026**
Commodity: **Grant Proposal Development and Consulting Services**
RFP Closing On: **March 11, 2026 at 2:00 p.m. (Eastern)**

Please note the clarifications and/or changes made on this proposal program:

1. *Question:* How many grant opportunities/proposals per year are anticipated, and what are the typical turnaround times?

Answer: This is unknown.

2. *Question:* How frequently is on-site data collection anticipated, and what travel/local presence assumptions should pricing reflect?

Answer: On-site expectations are unknown, but offerors should provide all available pricing information.

3. *Question:* What are the minimum expected outcomes (e.g. number of logic models, instruments, evaluation plans, reports) for a “typical” engagement?

Answer: This is unknown and will vary based on project scope.

4. *Question:* Will JMU require use of specific systems for artifact storage/collaboration, and what constraints exist for any contractor-hosted solutions?

Answer: There are no requirements for specific systems currently. Existing constraints depend on the type of JMU data being shared or stored and will follow JMU IT policies if required. At this time, there is no expectation of sensitive data to be shared that would have any constraints.

5. *Question:* Which entities beyond JMU (if any) are expected to use the cooperative arrangement, and how should that affect pricing assumptions by zone?

Answer: We cannot confirm which entities beyond JMU would be interested in utilizing any resulting contract.

Signify receipt of this addendum by initialing “*Addendum # 1*” on the signature page of your proposal.

Sincerely,

A handwritten signature in black ink, appearing to read "Shanna Devers", with a long horizontal flourish extending to the right.

Shanna Devers, CUPO
Lead Commodity Contract Officer
Email: deverssl@jmu.edu
Phone: (540-568-3131)



March 2, 2026

ADDENDUM NO.: TWO

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# SLD-1247**
Dated: **February 12, 2026**
Commodity: **Grant Proposal Development and Consulting Services**
RFP Closing On: **March 11, 2026 at 2:00 p.m. (Eastern)**

Please note the clarifications and/or changes made on this proposal program:

1. *Question:* Are you seeking training on the grant development process, or are you seeking a firm to write proposals and grants for the university, or both?

Answer: JMU CARE is not seeking training. We need a firm that brings specialized expertise to collaborate with our team in writing grants, developing competitive proposals, and strengthening our overall capacity to pursue external funding.

2. *Question:* Please provide more specificity around the nature of “capacity building” that is referred to under the statement of needs. For example, are you seeking a firm to provide training that builds faculty/staff capacity across all tasks/items listed or does capacity refer to engaging a partner that can supplement the strengths of the university to expand its “bench” of researchers?

Answer: In this context, “capacity building” refers to augmenting JMU CARE’s internal expertise and bandwidth by engaging a partner with deep experience in grant writing, evaluation design, grant strategy, and related technical skills. This is not about faculty/staff training. It is about supplementing our team with expert partners who can help expand our ability to pursue and manage complex grant opportunities.

3. *Question:* The scope requests “data collection,” so we want to confirm expectations around this (frequency, location(s), modality). Or, is the expectation that the vendor support JMU CARE to think about methodology and data collection methods and approaches?

Answer: Expectations will vary by project, and in many cases the firm’s role will be to support JMU CARE in designing appropriate methodologies and data collection approaches. Some projects may include data collection, but this will depend entirely on the individual project scope.

4. *Question:* Reference Statement of Needs, B. #16: Who is meant by “project staff” - is this our proposed team supporting JMU or is it JMU staff?

Answer: “Project staff” refers to the vendor’s proposed team supporting JMU/CARE, not JMU personnel.

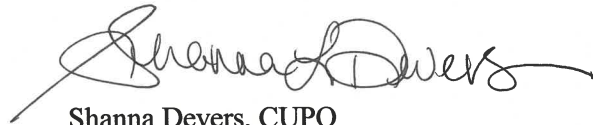
MSC 5720
752 Ott Street, Room 1042
Wine Price Building
Harrisonburg, VA 22807
Office of 540.568.3145 Phone
PROCUREMENT SERVICES 540.568.7935 Fax

5. *Question:* What are the specific expectations related to “ongoing training”?

Answer: JMU CARE does not require the vendor to provide training to JMU CARE staff. However, we do expect the vendor to maintain ongoing internal training for their own personnel to ensure consistently high-quality services. The expectation is that the vendor’s team will continuously develop and update their expertise, so that CARE receives support informed by current standards, high technical quality, and up-to-date knowledge of the funding landscape.

Signify receipt of this addendum by initialing “*Addendum # 2*” on the signature page of your proposal.

Sincerely,

A handwritten signature in black ink, appearing to read "Shanna Devers", with a long horizontal flourish extending to the right.

Shanna Devers, CUPO
Lead Commodity Contract Officer
Email: deverssl@jmu.edu
Phone: (540-568-3131)



March 5, 2026

ADDENDUM NO.: THREE

TO ALL OFFERORS:

REFERENCE: Request for Proposal No: **RFP# SLD-1247**
Dated: **February 12, 2026**
Commodity: **Grant Proposal Development and Consulting Services**
RFP Closing On: **March 11, 2026 at 2:00 p.m. (Eastern)**

Please note the clarifications and/or changes made on this proposal program:

1. *Question:* How does JMU define “strategic thought partnership” in this context, and what types of decisions or planning processes should Elite Research support?

Answer: For JMU, this means helping clarify complex ideas, co-creating solutions, and offering new perspectives.

2. *Question:* For evaluation services, does JMU expect formative, developmental, outcomes-focused, or mixed-methods evaluation, and should the partner design frameworks, conduct evaluations, or both?

Answer: JMU CARE anticipates that evaluation needs will vary by project, and the firm should be prepared to support formative, developmental, outcomes-focused, and mixed-methods approaches depending on the scope. The vendor should be able to design evaluation frameworks and, when appropriate for the project, conduct components of the evaluation, though the extent will differ case by case.

3. *Question:* Does JMU have existing interdisciplinary initiatives (e.g., health, education, STEM, social impact) that the partner should integrate with? and/or Which colleges, centers, or research clusters are expected to be the primary users of these services?

Answer: This is unknown, as projects will vary depending on scope.

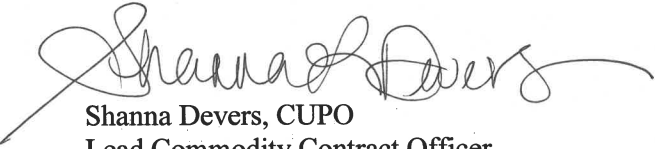
4. *Question:* Is JMU open to or capable of providing incentives (gift cards, raffles, etc.) to encourage participation?

Answer: This is unknown at this time.

Signify receipt of this addendum by initialing “Addendum # 3” on the signature page of your proposal.

MSC 5720
752 Ott Street, Room 1042
Wine Price Building
Harrisonburg, VA 22807
540.568.3145 Phone
540.568.7935 Fax
Office of
PROCUREMENT SERVICES

Sincerely,

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Shanna Devers, CUPO
Lead Commodity Contract Officer
Email: deverssl@jmu.edu
Phone: (540-568-3131)