



Request for Proposals

For the Provision of Sales, Marketing and

Business Development Services



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Background and Current Status

The University of the Virgin Islands (UVI) Research and Technology Park (RTPark) is an economic development program that is designed to bring investment to the United States Virgin Islands by managing an incentive program and offering other advisory and technical services. It is a partnership between the private sector, the government of the US Virgin Islands and the University of the Virgin Islands. The goal of the RTPark is to successfully establish the U.S. Virgin Islands as a premier business destination of choice for firms in knowledge and technology intensive sectors. The core value proposition that the RTPark presents to potential investors is three fold: tax incentives; the lifestyle of an island paradise; and the opportunity to contribute to improving the quality of life in a community small enough for the activities of a single firm to make a difference. The RTPark presents the US Virgin Islands as an investment destination that provides access to affordable, reliable, world-class technological infrastructure; a sound legal framework that is favorable to inward investment; and impeccable governance systems that are business friendly.

The RTPark was established in 2002 and successfully attracted its first commercial client in 2006. The RTPark is headquartered in the 64 West Center, on the Albert A. Sheen campus of UVI in St Croix, US Virgin Islands. Access to Tier 1 Internet connectivity is made possible by the undersea cables on the Northwest tip of St Croix. There are reliable, first-rate data storage and data management facilities in the Level 3/Global Crossing data center. Fast, effective, affordable, best in class broadband communications services, as well as high quality data storage and hosting facilities, contribute to making the US Virgin Islands a very attractive destination for technology and knowledge-based firms.

The core value proposition of the UVI RTPark for potential investors is three fold: an attractive tax incentive program; enjoying the lifestyle of an island paradise; and the opportunity to contribute to improving the quality of life in a community small enough for the activities of a single firm to make a difference. The RTPark presents the US Virgin Islands as an investment destination that provides access to affordable, reliable, world-class technological infrastructure; a sound legal framework that is favorable to inward investment; and impeccable governance systems that are business friendly. This value proposition is particularly appealing to impact investors who are concerned with financial returns and making contributions to sustainable human development.

The RTPark has instituted a targeted and highly intelligent business development program designed for future growth and dynamism. This effort has identified under-explored sectors in areas where needs are plentiful and potential for disruption is great. Investment projects that are focused on quality are screened for their likelihood of fit with the US Virgin Islands.

New targeted clusters and sectors include:

- **Health and medicine, including medicinal devices, personalized medicine applications, wellness and healthcare management**
- **Energy** research and system deployment, including renewable and clean technology systems, energy efficiency solutions, and energy management
- **Marine science** related products, devices and services
- **Sustainability solutions and systems**

The RTPark is keen to attract knowledge-based investors in these new clusters and to expand its client base in its existing areas of strength which include:

- **telecommunications and information technology**
- **applications service provision**
- **Internet advertising**
- **software development**
- **software-as-a service**
- **e-commerce**
- **interactive media management**
- **content development and**
- **data hosting and data management.**

The RTPark currently has thirty (32) client companies engaged in varying activities from infrastructure, proprietary software and systems, to high-speed broadband communications and e-commerce. It is estimated that thirty-five (35) client companies would be in the program by the end of Q1 calendar year 2016. RTPark clients are required to make legally binding commitments to UVI. The existing clients have supported UVI in a number of ways including: student engagement (internships, fellowships and volunteering), student scholarships, faculty engagement, joint research projects or curriculum advice, special projects, advice and operational assistance to UVI, gifts and endorsements, distinguished lectures, knowledge exchanges and employment programs for the US Virgin Islands and UVI graduates. The RTPark management and staff will be placing considerably emphasis on assisting clients and UVI to execute against these commitments.

The RTPark program's focus is on integrating long-term impacts that are beneficial to society, in line with global trends that have seen an increase in *impact investment* - private sector investment that is equally concerned with optimizing private and social returns. Targeting and attracting impact investors to the US Virgin Islands is a key strategy for the RTPark.

Further information available at <http://rtpark.uvi.edu>

RFP Requirements

The UVI RTPark is seeking professional sales, marketing and business development services, including but not limited to, design and execution of business development, sales and marketing strategies and executing marketing activities to attain stated goals and benchmarks. The successful Proposer would be expected to provide comprehensive, strategic and innovative sales, marketing and business development services to attract new, suitable clients that are consistent with the RTPark's strategy and mandate.

Scope and Description of Services. The objective of this RFP is to procure sales, marketing and business development services, development and implementation of sales strategies, creation of marketing initiatives, support services for market outreach activities, and other related business development activities. The successful Proposer shall fully coordinate all services under the Agreement with the Executive Director of the RTPark. Services to be performed include:

- A. Provide strategic marketing support for the development and implementation of a sales and marketing program designed to target international investors and companies in targeted clusters like; health and medicine, including medicinal devices, personalized medicine application, wellness and healthcare management; energy research and systems, including renewable and clean technology, energy efficiency, energy management; and sustainability solutions in marine science.
- B. Assist with the engagement and commitment of the RTPark clients. This includes, generating leads, identifying prospects, selling the RTPark's story, services and products as well as assisting in the sales commitment of prospects, according to the criteria established by the RTPark.
- C. Developing and providing a variety of promotional, publicity and advertising plans consistent with specifications provided by the RTPark.
- D. Provide advice and recommendations to the RTPark for development and implementation of designated marketing projects.
- E. Design, develop, and deliver informational and promotional materials for designated RTPark initiatives and events.
- F. Provide strategic advice and recommendations to the RTPark Executive Director and Board of Directors and other related, identified stakeholders, for the development of policies and strategies designed to raise the profile of US Virgin Islands (generally) and RTPark's (specifically) branding as a technology and knowledge intensive destination.
- G. Provide advice and recommendations to UVI and the RTPark to successfully design, develop and implement marketing and sponsorship initiatives to highlight the joint enterprise activities of UVI and RTPark clients, including, student engagement internships, student scholarships, joint research projects, curriculum development, special projects, advice and operational assistance to UVI, gifts and endorsements, knowledge exchanges and employment programs, by creating vehicles to share ideas, knowledge, and success stories.
- H. Successfully target and attract impact investors to the US Virgin Islands.
- I. Work on designated projects on an as-needed basis.

The successful Proposer will highlight and allocate qualified personnel dedicated to managing the requested services. The successful Proposer will have experienced staff and be knowledgeable in sales and marketing of knowledge-based and technology-enabled services with a well-established track record of success. The Proposer will establish a team leader who will manage services provided under the resulting contract. The RTPark will not accept any substitutions of the team leader or other key personnel except

for substitutions required for reasons outside the control of the successful Proposer and upon written approval by the RTPark. The successful Proposer will be available on an on-call basis for any emergency situations.

Contract Value and Term: The contract value resulting from this RFP, including services performed and reimbursement of costs and expenses incurred, if any, shall be calculated and expressed as a) a success fee for new RTPark clients and b) the Proposer's identified fees for delivery of the services defined in the Description of Services above. The total contract value will include:

1. Success fee for each new Prospective Tenant (PT) successfully brought to the RTPark by the selected provider. This will be expressed as a percentage of the PT's first year fees to the RTPark attributable to the Proposer's efforts.
2. Costs for providing the services payable on agreed deliverables. Such costs shall include references to the estimated time allocated for the provision of services and the rate (hour/day) charged by the Proposer.
3. Reimbursable costs that are approved by the RTPark. Examples of these costs include travel and other direct expenses incurred outside the scope of services to be provided as defined in this RFP.
4. Any direct costs payable to agencies and external vendors.

The term of the agreement will be for two years with an option to renew for an additional year.

Qualifying proposals for the provision of sales, marketing and business development services will be accepted from:

- a. Individuals operating as independent contractors
- b. For-profit, private entities
- c. Not-for-profit entities

Preference is given to Proposers with a successful track record and experience of working with impact investors. Proposers submitting a response to the RFP will be asked at a minimum, to state their qualifications, understanding/experience relating to the project and offer their methodology for meeting the program criteria. The short-listed Proposers (Finalists) from the RFP Phase will proceed to the Interview Phase and be requested to present to the Selection Committee.

Timeframe for RFP Project

The table below indicates the key dates within the RFP process.

Revised March 11, 2016 Version 3

Dates/Time Period	Activity
Dec 31 st 2015 – January 12 th 2016	Public Release of RFP
January 29 th 2016	Deadline to Submit Questions (must be submitted in writing.)
February 9 th 2016	Response to Questions Distributed
February 26 th 2016	Due Date for Receipt of Proposals
Feb 29 th , 2016	Acknowledgement of Receipt of Proposals
March 11 th , 2016	Notification to Proposers of Revised Timeline
April 8 th , 2016	Notification to Finalists and Unsuccessful Proposers
April 25 th -29 th , 2016	Interviews with/Presentations from Finalists
April 30 th – May 2 nd , 2016	Evaluation of Finalists Selection of Prospective Service Providers
May 2 nd 2016	Notification to Selected Service Providers and Unsuccessful Finalists
May 3 rd -31 st , 2016	Negotiation with Selected Service Providers Execution of Agreement(s)

RFP Proposal Content

The competitive selection process for this RFP will focus on the qualifications and prior history of performance on similar projects of each Proposer and the Proposer's team members, as appropriate, in accordance with the selection criteria set forth in this RFP.

Each Proposer must comply with the submission requirements as outlined below. Submittals that fail to comply with the requirements as specified may be deemed non-responsive and such determination will result in no further consideration of that respondent or the respondent's submittals by the RTPark. Proposals must be received no later than date and time stated below. Late submittals will be rejected.

The proposal must include a Table of Contents and be organized as follows:

Technical Proposal

General Information: Of the firm and organizational structure including name of authorized officer(s).

Key Personnel: Identify the individuals from the firm who will be involved in the project and their responsibilities. Provide CVs and brief biographical data of the primary participant(s), including the Project Manager. Further, provide a separate list of key personnel setting forth the name(s) of such persons and corresponding title.

Organization and Management of Services: Describe how the management approach to ensure the services will be provided in a thorough, effective, and timely manner. Include information regarding, approach and identification of specific issues, problems and opportunities.

Summary of Demonstrated Experience: Describe the firm's projects and experience during the last three years that is similar to the work described in the Scope of Work or that Proposer believes would be relevant in evaluating the firm's capabilities to perform the work, including:

- Contracts involving similar work performed by the firm and personnel who performed these services.
- Brief, concise description of delivery of the services.
- Any extraordinary projects or challenges or both encountered during performance of such contracts. Describe the complexities and innovative approaches used to solve such problems.
- References. List three (3) appropriate references including contact name, address, email and telephone number. These references should be able to substantiate the Proposer's ability to perform the work required.

Financial Proposal

1. Pricing: Proposer will state the value for the contracted services net of any taxes and will also identify the rates and times estimated for all the various components of the Proposer's pricing. All rates and fees will be fixed for the duration of the contract. Overhead costs, including, without limitation, faxing, cellular phone air time, and computer processing time, must be borne exclusively by the consultant as a cost of doing business. Proposer shall identify the percentage sought for the success fee component of the Contract Value. Proposer should also identify the retainer amount (if any) requested if selected.
2. Strategies for minimizing costs and expenses.
3. Financial information and statements demonstrating the financial stability of the Proposer to successfully deliver the required services for the contract period.

RFP Submission

All questions related to this RFP should be directed to:

Dr. Gillian Marcelle: Executive Director of the UVI Research and Technology Park
Phone Number: +340 692 3404
Email: RFP@UVIRTPark.net

Proposers shall submit three (3) copies of their completed proposal in a sealed envelope via courier mail and one (1) copy via email. Proposals must be delivered and received at the following address on or before the closing date of Friday February 26th, 2016.

Contact: Dr. Gillian Marcelle, Executive Director
Address: 64 West Center, Palm Drive
UVI, Albert A Sheen Campus
Kingshill, St. Croix,
U.S. Virgin Islands VI 00850

Any notices with respect to this RFP should also be mailed to the above contact and address.

RFP Evaluation Process

The evaluation of proposals will take place as described below.

RTPark Selection Committee: A Selection Committee will review and evaluate all responsive submittals and other information received in accordance with the requirements of this RFP, later directives from RTPark and the official advertisement. In assessing the strengths and weaknesses of each respondent, the Selection Committee may, at its discretion, request clarification of any response to this RFP or other issue that may arise during the selection process. Once the review is completed, recommendations from the Committee will be submitted to the RTPark Executive Director for final selection of the successful Proposer.

The RTPark will not accept any information, in any form whatsoever, from Proposers after the proposal due date. Unsuccessful Proposers will be notified in writing that they were not selected to compete in the next stage of the selection process and such notification shall result in no further consideration of these submissions. All determinations of the RTPark regarding rejection shall be final.

General Evaluation Criteria: Proposals will be rated by the committee according to the following criteria, using a 50 point scale. Proposers rated the highest according to this criteria will be invited to an interview and to make a presentation.

1. Qualifications and experience of the Proposer (the person or entity legally responsible for the provision of services) in the professional areas listed in this RFP. Include the qualifications and experience of the Proposer's team leader and other key personnel (including subcontractors, if any) in the professional areas listed in this RFP and in similar projects. **(10 points)**
2. Proposed approach to provision of services, including philosophy and understanding of the services and approach to market challenges and opportunities. **(10 points)**
3. Proposed methodology of marketing management approach of project team and assigned work tasks. **(10 points)**

4. Demonstrated ability of innovative approaches, creative strategies, effective communication, market reach; demonstrated ability to achieve sales targets and marketing objectives in a timely and efficient manner; demonstrated ability to develop and maintain team consensus with the RTPark and its various stakeholders. **(10 points)**
5. Proposed fees and management of expenses. **(10 points)**

GENERAL REQUIREMENTS

Contract Review: The successful Proposer will be required to execute a contract with the RTPark to commence services. Finalists shall review a Sample Agreement, provided at time of notification, and submit a list of all questions, issues, or modifications which the Proposer would like RTPark to review and address, should they be selected as the top ranked proposer. The RTPark shall assume that the Sample Agreement has been thoroughly reviewed and discussed with legal counsel prior to submission of the list of issues. Therefore, all Proposers are strongly advised to seek legal counsel prior to preparing such a list.

The RTPark anticipates that the final Agreement submitted to the selected Proposer for execution will be in a form substantially similar to the Sample Agreement. Consequently, The RTPark will not enter into detailed negotiations of the terms and provisions contained in the Sample Agreement. Instead, the RTPark will review the list of issues raised by the selected Proposer, address each issue at its sole discretion and provide the selected Proposer with a final executable Agreement for signature.

In the event the RTPark elects to make significant, material changes to the form provided or proceed with another agreement format, the RTPark will provide the selected Proposer with an opportunity to review and submit a list of issues regarding the changes or new format. The RTPark will then address the issues raised at its sole discretion and provide the selected Proposer with a final executable Agreement for signature.

Should the Proposer fail to execute this final Agreement, the RTPark reserves the right to negotiate with the Proposer, terminate further negotiations and initiate negotiations with the next ranked Proposer or reject any or all Proposers, as its best interests may appear.

Independent Contractor: Under any resulting contract, the Proposer will be an independent contractor retained to perform professional or technical services for limited periods of time. Neither the Proposer nor any of its employees will be deemed to be employees or officers of the RTPark for any purpose whatsoever.

Proposal Preparation, Proposer's Costs and Expenses: The RTPark is not liable for any costs or expenses arising out of preparation of Proposer's proposal. If selected, Proposer may not include any of these costs or expenses as part of its fee, rates, or charges for performing work under the Agreement.

Proposer to supply its own materials: The successful Proposer will provide and pay for all labor, supervision of its employees and agents, travel, insurance, vehicles, materials, and tools (including computers, laptops, software, smartphones, PDA's) necessary to provide services under the resulting contract. Any use of the RTPark's facilities (office space, conference rooms, telephones, email, or copy machines, etc.) will be allowed only as necessary as explicitly agreed to.

Verification of Information: The RTPark will rely on the accuracy and completeness of all information provided in making its selection. As such, Proposers are urged to carefully review all information provided to ensure the clarity, accuracy, and completeness of such information. As the RTPark deems necessary and appropriate, RTPark reserves the right to make any inquiries or other follow up required to verify the information provided.

RFP General Terms and Conditions

Liabilities of RTPark

This RFP should be regarded solely as an invitation to submit proposals and does not imply any contractual obligation on behalf of the RTPark. No responsibilities whatsoever shall arise from the RFP process unless and until a formal agreement is signed between the RTPark and the selected Proposer.

Designated Administrator: The Executive Director of the RTPark is designated to serve as administrator for this selection process and will be responsible for coordination of the procedures and rules specified in this RFP, managing this process and all other matters related to this process. In conducting the process in a fair and equitable manner, the RTPark Executive Director may appoint a representative to serve as the primary intermediary between the Proposers, the RTPark, and the members of the Selection Committee. Any applicant that contacts any member of the Selection Committee, other than the designated contact from the date of issuance of the RFP and prior to the completion of the RFP selection process, may be disqualified from further participation in the selection process, at the administrator's sole discretion.

As the RTPark determines appropriate, it will issue addenda to supplement this RFP. Each Proposer shall provide RTPark with contact information for receipt of such addenda. Any applicant who downloads the RFP from any designated online source or otherwise obtains this document, must send an email to RFP@UVIRTPark.net with the party's contact information in order to receive any addendum or clarifications. The RTPark is not responsible for e-mail delivery failure for any reason. It shall be conclusively presumed that the applicant did, before submitting a response to the RFP read all addenda, posted decisions, and other items relevant to the qualifications. All addenda shall be acknowledged by Proposer and returned to the RTPark with the proposal document.

The RTPark will, at its discretion, award the contract to the responsible vendor submitting the best proposal that complies with the RFP. The RTPark may, at its sole discretion, reject any or all proposals received or waive minor defects, irregularities, or informalities therein.

Confidentiality & RFP Ownership

This RFP is both confidential and proprietary to the RTPark, and the RTPark reserves the right to recall the RFP in its entirety or in part. The RTPark reserves the right to accept or reject any and all submittals, to modify or suspend the process, to modify the terms and conditions of the selection process, to request one or more re-submissions or clarification from one or more Proposers, or to cancel the process in part or whole. No Proposer is obligated to respond to or to continue to respond to the RFP after the submission and closing date.

Proposers cannot and agree that they will not duplicate, distribute or otherwise disseminate or make available this document or the information contained in it without the express written consent of the RTPark.

Proposers shall not include or reference this RFP in any publicity without prior written approval from the RTPark, which, if granted, shall be granted by the Executive Director. Proposers must accept all of the foregoing terms and conditions without exception. All responses to the RFP will become the property of the RTPark and will not be returned.

Non - Disclosure Agreement

Proposers shall agree to sign a non-disclosure agreement to safeguard the confidentiality of the RTPark's business information and data.

Contract Negotiations

At the completion of the selection process, the RTPark will enter into negotiations with the selected Proposer. Proposers should also be aware that the following documents will be considered for the Final Agreement:

- RTPark's RFP.
- Proposer's proposal –technical and financial.
- Any modifications to the proposal.
- Proposers' Responses to Sample Agreement.
- Non-Disclosure Agreement (NDA).