REQUEST FOR PROPOSALS (RFP)
RFP T2027-001
Component-Level Strategic Plan Development

Submission Deadline: 11/18/2026, 2:00 PM (AST)

1. Purpose and Background

The University of the Virgin Islands (UVI) seeks proposals from qualified consultants to develop seven concise, actionable component-level strategic plans aligned with UVI's existing GRAND Momentum institutional strategic planning framework. UVI is addressing the institutional plan refresh internally. This procurement is strictly limited to component-level plan development and the essential tools needed for each component to implement and monitor its priorities.

The University intends to obtain practical, usable plans within a disclosed firm total budget. Proposers must design an efficient, primarily virtual process that uses existing University materials and targeted meetings rather than a broad institutional planning engagement.

2. Maximum Budget and Pricing Requirement

The maximum amount available for this engagement is FORTY THOUSAND DOLLARS ($40,000). Proposals with a total price above $40,000 will be deemed nonresponsive. The proposed fixed price must include all professional fees, virtual meetings, document preparation, revisions, overhead, taxes (if applicable), travel (if any), and other reimbursable expenses. UVI will not pay additional expenses beyond the accepted fixed price without a separately authorized written contract modification, subject to applicable procurement requirements.

Price is an evaluation factor, but award will not be determined solely on the lowest proposed price. Proposers must demonstrate the ability to deliver all required plans within the stated ceiling.

3. Limited Scope of Services

3.1 Seven component-level strategic plans

Prepare one concise strategic plan for each of the following University components:

- Academic Affairs
- Administration & Finance
- Information Systems and Institutional Assessment
- Institutional Advancement
- Research and Economic Development
- Student Success and Innovation
- Foundation for UVI and UVI at USM Foundation

3.2 Required content of each plan

Each of the seven plans must include:

- A brief component mission/context statement and alignment to relevant GRAND Momentum priorities;
- A limited set of prioritized strategic goals and SMART objectives, developed with the component lead;
- Measurable outcomes and a manageable set of key performance indicators (KPIs), including available baselines or a practical method for establishing them;
- A simple implementation action table identifying key activities, responsible offices/roles, target completion dates, and measures of success;
- A short description of how the component will monitor progress and report status using existing University processes.

3.3 Efficient engagement and development process

- Review existing institutional and component planning materials supplied by UVI;
- Conduct one virtual kickoff meeting with designated University leadership and one focused virtual working session per component (sessions may be grouped where appropriate);
- Prepare seven draft plans, receive one consolidated round of written UVI comments per plan, and deliver seven final plans;
- Conduct one virtual closeout meeting to review final deliverables and explain the common plan template.

3.4 Express exclusions

The following services are NOT included in this procurement: refresh or rewriting of the institution-wide GRAND Momentum Strategic Plan; institution-wide environmental scans or extensive surveys; broad campus listening tours; change management consulting or leadership training; creation or implementation of software dashboards; ongoing quarterly reporting; and post-delivery implementation support. Proposers must not condition their price on these excluded services.

4. Deliverables and Acceptance

Deliverable	Minimum requirement
1. Work plan and standard template	Brief schedule, information requests, and a consistent component-plan format.
2. Seven draft component plans	One draft for each named component, containing the elements in Section 3.2.
3. Seven final component plans	Seven revised, editable Word files and corresponding PDFs incorporating one consolidated UVI review cycle.
4. Consolidated implementation matrix	One editable Excel or Word summary of priority objectives, KPIs, owners, and milestones across the seven components.
5. Virtual closeout	One meeting to present completed plans and answer implementation questions.

All deliverables must be original to the engagement, internally consistent, and suitable for practical University use. UVI will designate a project representative to coordinate timely consolidated feedback. Deliverables are subject to written acceptance by the University.

5. Period of Performance and University Responsibilities

Proposers shall propose a realistic schedule for completing the work, preferably within 10–12 weeks of notice to proceed. The final schedule will be agreed upon before contract execution. UVI will provide available planning documents, designate component points of contact, coordinate access to staff, and provide one consolidated review of each draft.

6. Proposal Content and Format

Submit one searchable PDF proposal containing the following sections in order:

- Signed cover letter stating the proposer's legal name, contact information, and acceptance of the $40,000 ceiling;
- Relevant experience: brief firm profile and at least two examples of comparable higher education, nonprofit, or multi-unit strategic planning assignments, with references;
- Proposed approach: concise description of how seven plans will be developed efficiently using UVI materials and targeted virtual engagement;

- Work plan: milestones, schedule, assumptions, and proposed roles of UVI staff;
- Key personnel: lead consultant qualifications, responsibilities, and identification of any proposed subcontractors;
- Fixed-price cost proposal: one total not-to-exceed amount and a simple allocation by major deliverable or milestone; confirm that all costs are included;
- Exceptions or requested clarifications, if any, to the stated requirements.
- Proposals should be concise (recommended maximum 12 pages, excluding resumes and references). Promotional material that does not address the limited scope is discouraged.

7. Evaluation and Selection

UVI will evaluate responsive proposals based on the criteria below. The University may seek clarifications or conduct brief interviews with one or more firms before selection.

Criterion	Points
Relevant strategic planning experience and demonstrated results	30
Understanding of UVI's limited component-level scope	25
Practical methodology, staffing, and achievable timeline	25
Fixed-price proposal and overall value	20
TOTAL	100

The University may consider references, demonstrated capacity, and the feasibility of the proposed approach. Price will be assessed for value and completeness within the maximum budget; the lowest-priced proposal is not automatically selected.

8. Questions and Submission Instructions

Questions

Submit written **questions by November 6, 2026, at 5:00 p.m. AST to bids@uvi.edu, referencing "RFP 2027-001 – Component-Level Strategic Plan Development**." UVI may issue written addenda to all prospective proposers through its established solicitation posting process. Only written addenda issued by Procurement modify this RFP.

Submissions

Email the **completed proposal in PDF format to bids@uvi.edu** no later than **November 18, 2026**, at **2:00 p.m. (AST**). Use the subject line: "**RFP 2027-001 – Component-Level Strategic Plan Development – [FIRM NAME]**." Late proposals may be rejected. Proposers are responsible for timely electronic delivery.

9. Procurement and Contract Conditions

- This is a new competitive solicitation. It is separate from cancelled RFP T2026-009; no prior evaluation scores or rankings carry forward.
- UVI reserves the right, consistent with applicable policies, to reject any or all proposals, cancel this solicitation, seek clarifications, waive minor informalities, or negotiate with a selected proposer.
- Issuance of this RFP does not obligate UVI to award a contract or reimburse proposal preparation expenses.
- No work may begin until the required University approvals and a fully executed written agreement or other authorized purchasing instrument are in place.

- The selected firm must satisfy applicable University vendor registration, tax, insurance, conflict-of-interest, and other contractual requirements before award or commencement, as applicable.
- Any subcontractors must be disclosed in the proposal. The selected firm remains responsible for all deliverables.
- All final project documents, templates, and matrices developed specifically for UVI shall be provided in editable formats, subject to the terms of the executed agreement.
- Any modifications to scope, price, or schedule require prior written authorization by UVI.

10. Procurement Contact

University of the Virgin Islands
Procurement Department
Questions and proposal submissions: bids@uvi.edu