

## COLORADO STATE UNIVERSITY SYSTEM PARTNERSHIP PROGRAM

### Program Overview

The Colorado State University System (CSUS) sets strategic vision and values of the System Partnership Program (SPP) and reviews and approves strategic partnerships with directive support from the Chancellor. CSU-Fort Collins (CSU) has established an Industry Partnership Council (IPC) that has the responsibility for identifying opportunities for CSU as well as the System, and/or one of its institutions, to engage further with the business community. Engagement in comprehensive business relationship may provide opportunities for system-wide and or university-wide relationships with business partners by collaborating with one or more institutions within the System to develop partnership opportunities that align with the CSUS, along with the institutions, values and mission of teaching, research and service. The primary goal is to connect world-class businesses and industries with a top public university as well as the CSUS to foster dynamic and innovative opportunities, providing mutual benefit to the universities and their business partners. Certain partnerships may come about without the direct engagement of the IPC.

When such an opportunity involves the potential procurement of goods and services, the strategic opportunity is referred to CSU Procurement Services (PS) who will provide a structured process for developing proposals that offer a wide range of benefits to the System and its institutions. Contact with potential service providers/suppliers about a specific opportunity will only occur through or in coordination with PS. For each procurement activity, a Strategic Sourcing Group (SSG) will be established. Activities of the SSG will be guided by the parameters established within this System Partnership Program.

Under this model, the SSG is able to provide the infrastructure and process for one or more of the System institutions to create “preferred vendor” relationships that mutually benefit a university or the system as a whole. Membership on an SSG will vary for each procurement activity and may include members of the IPC. Each SSG will be administered by a PS representative who will provide the necessary guidance and support to ensure an effective procurement process. The SSG will be chaired by either the Vice President for University Operations or a Chancellor designee. Other third parties may be relied upon, as deemed necessary, as consultants to the SSG. The SSG offers potential revenue generation support and partnership expertise to units across campuses while providing a consistent, professional approach that adheres to each university’s mission, values and purpose.

### Program Goals

The goals of the System Partnership Program include:

- **Brand alignment** – shared mission and values between CSUS and partner organization
- **Experience** – contributing to the CSU experience, CSU-Fort Collins, CSU-Global and/or CSU-Pueblo
- **Impact** – meaningful program support, sustainability and industry innovation
- **Revenue Growth** – pursuing significant partnerships that unlock new campus revenues and program support

### Governance Structure

#### 1. Industry Partnership Council:

The IPC membership includes the following members:

- a. Representative from the CSU System Office,
- b. CSU Procurement Services Representative,
- c. Representation from each System Campus,
- d. Representative from each of the following units within CSU.

- i. Vice President for Research
- ii. Vice President for External Relations
- iii. Vice President for Advancement
- iv. Vice President for Engagement
- v. Vice President for Student Affairs/Auxiliaries
- vi. Athletics
- vii. Ascend; and
- viii. Third-party representatives as deemed necessary: A third-party representative may serve on the IPC and bring potential partnerships to the IPC, and serve as a consultant to an SSG when deemed appropriate. Third-party representatives include but are not limited to agent/outside marketing firms, such as Learfield/RSP or partner organizations.

### Procurement Services

1. A PS representative serves as the official lead of the SSG. PS will:
  - a. Manage all contact with potential responders to an RFP;
  - b. Negotiate, in conjunction with Contracting Services and members/consultants of the SSG as deemed appropriate, all procurement contracts;
  - c. Coordinate, in conjunction with Contracting Services, modifications to existing expenditure contracts to extend the term;
  - d. Develop partnership MOU's that affect multiple units or departments, outlining benefit allocations, commitment of assets, points of contact, timing, etc.;
  - e. Manage, in accordance with the established MOU, cash rebates, scholarships, and any other monetary consideration received from the vendor;
  - f. Provide an annual summary of each partnership to the CSUS CFO and the IPC; and
  - g. Secure Controller approval for extensions not provided for in an original contract.
  
2. The SSG (RFP Committee):
 

The SSG is chaired/led by a Procurement Services representative. Each institution participating within the specific procurement will appoint a member to serve on the SSG. The SSG will include Subject Matter Experts (SMEs) and impacted parties, including product category working groups. The SSG will develop a Partnership Plan for each partnership, clearly establishing the benefits, costs, and impacts of the proposed partnership and the steps that will be followed in its creation or extension.

The chief procurement officer for the lead institution will appoint a Category Working Group to research and develop the partnership concept and develop the Request for Proposal. Agreements will be negotiated with input from the SSG, specifically led by the SSG chair and Contracting Services, and the involved institutions' procurement agents. The SSG will provide a recommendation to the Vice President for University Operations, who will seek further input/approvals as needed, to determine the outcome of the SSG recommendation. Approval and execution of any contractual agreement will follow and comply with the established signature delegation and controller approval protocols of the involved institution. Competitive processes will follow the CSU Procurement Rules. When appropriate, students will be asked to serve on the Category Working Group/RFP Committee.

### System/University Assets

1. System and University assets may be included as part of a strategic relationship opportunity with the prior approval of the Chancellor or designee and the institution that is involved. Areas that may have assets include, but are not limited to: Alumni, Athletics, External Relations, Student Affairs, ASCSU, Central Administration, and individual departments/units.

2. Vendor access to students, whether through their official contact information or by any form of targeted marketing, requires the approval of the Vice President for Student Affairs (or similarly situated official at the respective institution).
3. Assets may be tangible, intangible, exclusive or non-exclusive.
4. Protecting privacy of employees and students is an important factor.
5. Higher pricing in exchange for other value received must be carefully evaluated to assure that overall the partnership will be in the best interests of the impacted institutions/units, not one unit over another.
6. In instances where the System/University will pay a higher price for goods/services in order to receive a value added benefit, caution must be taken to assure that the burden to internal customers (departments) is not unreasonable. Any such partnerships must be approved by the CSUS CFO and the involved institution CFO in advance of an award. The System/University may use an MOU to evaluate and clarify the balance of cost burden and revenue enhancement.
7. Consideration offered by a vendor partner (“value added” propositions) may include a signing bonus, rebates, guest performers/lecturers, and other items the University/System deems as valuable. However, no discussions or agreements about such items will take place between an institution or its agent and a prospective vendor partner or during the solicitation except as part of the official proposal and evaluation process. In the event meetings prior to the release of the proposal documents are held, no material information will be conveyed that is not also included within the official RFP documents.

#### Governing Principles

1. Partnerships should be broad-reaching with clear benefits to each affected campus. The Partnership Plan will ensure institutional fairness – avoiding harm to one unit or institution to benefit another.
2. The chief procurement officer for each institution will need to know of and understand any existing partnerships which have been discussed or established in addition to any newly proposed partnerships in order to fairly evaluate new proposals and assure that conflicts do not arise with existing vendor relationships.
3. Adherence to the universities’ Conflict of Interest Policies will be observed by all involved in the process (see, e.g., CSU Academic Faculty and Administrative Professional Manual Section D.7.7).
4. The CSU Procurement Rules will govern all purchases and the applicable institutional protocol for signature delegation and Controller approval will govern all contracts.
5. University Ethics provisions will be observed (see CSU Academic Faculty and Administrative Professional Manual Section D.19).
6. Procurement Code of Ethics contained in the CSU Procurement Rules will be explained to all committee members and strictly observed.
7. RFP Committee Participation Rules and Processes will be followed as outlined in the CSU RFP Manual.

#### Solicitation Policy

It shall be the policy of the CSU System that each institution will purchase goods and services in a manner that affords vendors a fair and equal opportunity to compete. The System and institutions will at all times avoid a “Pay to Play” process, defined as any arrangement in which prospective vendors must pay or give value in order to be allowed to compete in a fair process. We will follow the Anti-Kickback Act of 1986.

## Procurement Guidelines

1. All sponsorships that involve procurement of goods or services by the university, university assets and/or proposed areas of interest for developing a Partnership, must be reviewed by PS to analyze spend, potential for cost savings through preferred or exclusive arrangements, market, vendor pool, etc.
2. Once a decision to pursue a Partnership through a competitive process has been made, all communications between a University representative or agent and a prospective vendor must be coordinated with PS.
3. Prospective vendors shall not be provided any information that could create an unfair advantage in the event that a competitive procurement action should ensue. Any and all information provided must be generally available to the public, or made available to other prospective vendors. Records of all communications with prospective vendors shall be maintained and made accessible to PS. Any request from a prospective vendor (or anyone else) for information about a solicitation will be handled by PS as required under the CSU Procurement Rules and the Colorado Open Records Act.
4. All Partnership arrangements are to be obtained through the appropriate competitive solicitation process based on the types of goods and services, projected spend, market conditions, etc. In most circumstances, this will be via RFP. Decision making about the method of competition lies with the chief procurement officer for the lead institution.
5. Awards are to be made on the basis of the best overall value for the involved institutions. This includes price, quality, fit, and other factors deemed relevant by the RFP Committee and Procurement Services. Value-added propositions should be considered only after determining that the proposal is responsive and from a responsible bidder. If pricing is higher in order to induce value-added propositions, proponents of the Partnership must demonstrate why it is more advantageous to choose a higher price and how the customer departments will benefit.
6. Strategic Partnership/Value Add: the proportion of evaluation criteria weight shall not exceed more than 20% unless approved by the CSUS CFO in consultation with the lead institution's procurement officer.
7. Pricing: the proportion of evaluation criteria weight shall not exceed more than 30% unless approved by the CSUS CFO in consultation with the lead institution's procurement officer.