

COLORADO STATE UNIVERSITY SYSTEM PARTNERSHIP PROGRAM

1. Purpose and Goals

The Colorado State University System (CSUS or System) sets the strategic vision and values of the System Partnership Program (SPP) and reviews and approves strategic partnerships with directive support from the Chancellor. Engaging in comprehensive business relationships may provide advantages of scale and a greater degree of collaboration between a business partner and one or more of the campuses within the CSU System (each an Institution) while developing partnership opportunities that align with the System's values and its mission of teaching, research and service. The primary goal of the SPP is to connect world-class businesses and industries with a top public university and university system to foster dynamic and innovative opportunities, providing benefit to the System, the Institutions, as well as each business partner. Other goals of the SPP include:

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

2. Groups and Membership

CSU-Fort Collins (CSU) has established a standing Industry Partnership Council (IPC) that is responsible for identifying strategic opportunities to engage the business community with CSU, as well as other Institutions and the System as a whole. References in this document to the Vice President for University Operations (VPUO) refers to the CSU VPUO or the equivalent position at any other Institution.

A. Industry Partnership Council. The IPC includes, at a minimum, the following:

- a. CSU System Office Representative.
 - i. Unless otherwise designated by the Chancellor, this will be the Executive Vice Chancellor who will also serve as the chair of the IPC.
- b. CSU Procurement Services Representative
- c. Representation from each Institution
- d. Representative from each of the following units within CSU:
 - i. Vice President for University Operations
 - ii. Vice President for Research
 - iii. Vice President for External Relations
 - 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.
- e. Other representatives as appointed by the Chancellor or Chancellor's delegate.

B. Strategic Sourcing Group (SSG):

An SSG is created upon direction of the Chancellor to evaluate a specific opportunity. The SSG is

chaired by the Chancellor, Executive Vice Chancellor, Special Assistant to the Chancellor, or VPUO, as delegated by the Chancellor. The SSG includes a Procurement Services representative, who will manage and conduct any subsequent RFP process. Each Institution participating in a specific SPP process will appoint at least one member to serve on the SSG. The SSG will include subject matter experts and impacted stakeholders, including product category working groups, as jointly selected by the SSG chair and Procurement Services representative. The SSG offers potential revenue generation support and partnership expertise to units across campuses while providing a consistent, professional approach that adheres to each Institution's mission, values and purpose. Other third parties may be relied upon, when deemed necessary by the chair, as consultants to the SSG.

C. RFP Committee

The RFP Committee for a particular SPP opportunity is assembled in the normal manner in accordance with the CSUS or Institutional procurement rules. The RFP Committee may contain multiple members from both the IPC or SSG.

3. Process

The IPC will hold regularly scheduled meetings, as well as ad hoc meetings when requested by a majority of the IPC membership or at the direction of the Chancellor. The IPC will explore and evaluate SPP opportunities as identified by IPC members or as presented by other CSUS community members. If the IPC believes an SPP opportunity should be pursued and such opportunity includes either or both (1) the purchase of goods by the System or Institution(s), or (2) the material commitment of System or Institutional assets, the following process shall be observed:

A. The IPC will inform the Chancellor of a possible SPP opportunity and the Chancellor will appoint an SSG chair, who will then assemble an SSG as described above. In the event that an Institution other than CSU-Fort Collins identifies a partnership opportunity limited to its own campus, the respective VPUO or equivalent will inform the IPC and the Chancellor, and the Chancellor may create an SSG and appoint a chair without additional involvement of the IPC.

B. The SSG will develop a Partnership Plan for each opportunity, clearly establishing the benefits, costs, and impacts of the possible partnership. The Partnership Plan will generally describe the elements required for an RFP response, as well as the relative priorities upon which to assess such responses. The Partnership Plan will also contemplate which System or Institutional assets will be committed in such a partnership.

C. When the SSG has completed the Partnership Plan, the Procurement Services representative will assemble an RFP Committee and commence the RFP process. At such time, all communication related to the RFP between potential partners and CSUS or Institutional persons, including IPC and SSG members, must cease or be coordinated exclusively through the Procurement Services representative. Additionally, at the time of RFP issuance, all substantive information related to the RFP either shared by the SSG with potential partners or known to have been shared by others in the CSUS or Institutional community, shall be provided to the Procurement Services representative who will aggregate and make such information publicly available.

D. Upon receipt of RFP responses and evaluation per CSUS or Institutional Rules, the RFP Committee will vote and select a respondent. That selection, and the details of the corresponding response, will be submitted to the Chancellor who will either ratify the selection or delegate such ratification to the VPUO or SSG chair. If the selection is not ratified, the RFP Committee will resume the institutional process of evaluation. Upon ratification, the winning respondent will engage with Procurement Services and Contracting Services/Office of the General Counsel to negotiate and execute a final contract.

4. Commitment of System or Institutional Assets

Proper evaluation is required prior to the pledging or encumbrance of System or Institutional assets as part of the SPP process.

A. The commitment of System and Institution assets may be included as part of a strategic relationship opportunity. Assets may be tangible, intangible, exclusive or non-exclusive. Areas that have such assets include, but are not limited to: Alumni, Athletics, External Relations, Student Affairs, ASCSU, Central Administration, and individual departments/units.

B. Protecting the privacy of employees and students is extremely important, and partner access to students, whether through their official contact information or by any form of targeted marketing, requires the prior approval of the CSU Vice President for Student Affairs, or equivalent position at another Institution.

C. If the System or Institution will pay a higher price for goods or 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 partnership must be approved by the CSUS CFO and the involved Institution CFO in advance of an award. The System or Institution may use an internal MOU to evaluate and clarify the balance of cost burden and revenue enhancement.

D. Consideration offered by a vendor partner (“value added” propositions) may include a signing bonus, rebates, guest performers/lecturers, and other items an Institution or the System deems 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.

5. Role of Procurement Services

The Procurement Services representative conducts the RFP process. Related to the SPP, Procurement Services will:

- a. Manage all contact with potential responders to an RFP after issuance;
- b. Negotiate, in conjunction with Contracting Services and members/consultants of the SSG as deemed appropriate, all procurement contracts following an award;
- c. Develop internal partnership MOUs that affect multiple units or departments, outlining benefit allocations, commitment of assets, points of contact, timing, etc.;
- d. Manage, in accordance with such an internal MOU, cash rebates, scholarships, and any other monetary consideration received from the vendor; and
- e. Provide an annual summary of each partnership to the CSUS CFO and the IPC.

6. SPP Guidelines and Principles

In addition to the procurement rules of the System or relevant Institution, the following guidelines and principles shall inform the SPP:

1. Partnerships should be broad reaching with clear benefits for each affected campus. The Partnership Plan will ensure institutional fairness – minimizing detriment to one unit or campus to benefit another.

2. During the SPP process, the chief procurement officer for each Institution must be apprised of any existing partnerships that may conflict with 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 SPP process (see, e.g., CSU Academic Faculty and Administrative Professional Manual Section D.7.7).
4. The applicable institutional protocol for signature delegation and Controller approval will govern all contracts.
5. University Ethics provisions will be observed by all involved in the SPP process (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 SSG members and RFP Committee members and strictly observed.
7. RFP Committee Participation Rules and Processes will be followed as outlined in the CSU RFP Manual.
8. 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.
9. Prospective partners shall not be provided any information that could create an unfair advantage. Any and all information provided must be generally available to the public, or made available to other prospective vendors as described herein. Records of all communications with prospective vendors shall be maintained and made accessible to Procurement Services. Any request from a prospective vendor (or anyone else) for information about a solicitation will be handled by Procurement Services as required under the CSU Procurement Rules and the Colorado Open Records Act.
10. 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.
11. 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, with consideration of input provided by the SSG. Value-added propositions will be considered only after determining that the proposal is responsive and from a responsible bidder. If procurement pricing is higher in order to induce value-added propositions, it must demonstrate why this is advantageous and how the customer departments will benefit.
12. The proportion of evaluation criteria weight given to value add shall not exceed 20% unless approved by the CSUS CFO in consultation with the lead institution's procurement officer.
13. The proportion of evaluation criteria weight given to pricing shall not exceed 30% unless approved by the CSUS CFO in consultation with the lead Institution's chief procurement officer.