



Balfour & Company  
3490 Martin Hurst Road  
Tallahassee, FL 32312

VCU Business Services  
ATTN: Stephen Barr  
1111 West Broad Street  
Box 980208  
Richmond, VA 23298-0208

Mr. Barr,

On behalf of the entire Balfour team, I would like to again thank you for your partnership over the last several years to provide class rings, announcements, and regalia for Virginia Commonwealth University.

In accordance with the terms outlined in **Contract Number 7629420BA**, Balfour intends to renew our contract for one (1) additional five (5) year term through June 30, 2028. We look forward to reviewing the terms of our agreement with you, and to the continuation of our partnership with the University.

We hope and trust the University has also been satisfied with our partnership during that time, and shares our desire to proceed with exercising the renewal of our collaboration.

Please let me know if you have any additional questions or if I can be of further assistance in any way.

Sincerely,

A handwritten signature in dark ink, appearing to read "Drew Carlisle", with a stylized, cursive script.

Drew Carlisle  
Vice President, Growth & Engagement  
Balfour & Company  
[Drew.carlisle@balfour.com](mailto:Drew.carlisle@balfour.com)  
850.906.3578 (office)  
843.457.9322 (mobile)



# Procurement Services

## COMMONWEALTH OF VIRGINIA STANDARD CONTRACT

Contract Number: 7629420BA

This contract entered into date by Commemorative Brands, Inc. dba Balfour, hereinafter called the "Contractor" and Commonwealth of Virginia, Virginia Commonwealth 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:

**PERIOD OF THE PERFORMANCE:** From January 15, 2018 through June 30, 2023 with the option to renew for one (1) additional five (5) year term upon mutual written agreement of both parties.

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

The contract documents shall consist of:

- (1) This signed form
- (2) Contract Appendix A
- (3) The Request for Proposal (RFP) # 7629420BA, dated June 29, 2017
- (4) The Contractor's Proposal dated July 25, 2017

All documents are incorporated herein by reference. Any conflict or inconsistency between the incorporated documents shall be resolved by giving precedence in the following order:

- (1) This signed form
- (2) Contract Appendix A
- (3) The Request for Proposal (RFP) # 7629420BA, dated June 29, 2017
- (4) The Contractor's Proposal dated July 25, 2017

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

### CONTRACTOR:

Commemorative Brands, Inc. dba Balfour

By: Scott T. Blevins

Name Printed: Scott T. Blevins

Date: December 6, 2017

Title: Senior VP of Scholastic Products

### PURCHASING AGENCY:

Virginia Commonwealth University

By: Karol Kain Gray

Name Printed: Karol Kain Gray

Date: 12-11-17

Title: VP for Finance and Budget

**CONTRACT APPENDIX A  
NEGOTIATED CLARIFICATIONS, MODIFICATIONS, AND ADDITIONS TO CONTRACT**

VCU and Commemorative Brands, Inc. dba Balfour agree as follows:

**2017.8.17 RFP-7629420BA, Graduation Products Clarifications – Balfour**

p.1, #1 Regalia for students:

Balfour never charges rush or late fees. If a customer elects to use expedited shipping, the shipping cost billed to the customer is not marked-up with a handling or other fee. The shipping charge is the published rate directly from the carrier website... Balfour has the regalia ready in inventory to fill the needs of the VCU community without imposing any late order fees, rush charges or cut-offs for student regalia orders. In the event that a custom sized robe needs to be made, Balfour's manufacturing facility stands ready to respond quickly and efficiently having the robe completed as quickly as the same day.

p.4, #5 Web analytics data (proposal p. 64)

Balfour will share web analytics data with VCU Business Services.

p.5, #6: Itemized marketing commitment

Below is an itemized chart of marketing costs in support of VCU's Graduation Products Program. Each year, Balfour will review the marketing calendar and expenses with VCU to refine the activities that will support the University's goals for the graduation products program most effectively and reach the primary target audiences (VCU students, parents and alumni) in the ways that are most relevant to them.

Marketing Plan Itemization		
Event	Marketing Materials	Approx. Cost
Ceremony Ordering-Fall	Brochure Mailer	\$6,000
	Photo Booth	\$1,250
	Email	\$400
	Posters	\$50
Grad Fair-Fall	Grad Fair Mailer	\$3,500
	Email	\$400
	Posters	\$50
Ceremony Fall	Invitations	\$650
Event	Marketing Materials	Approx. Cost
Ceremony Ordering-Spring	Brochure Mailer	\$7,500
	Photo Booth	\$1,000
	Email	\$400
	Posters	\$50
Grad Fair-Spring	Grad Fair Mailer	\$4,500
	Email	\$400
	Posters	\$50
Ceremony Spring	Invitations	\$650
Grass Roots Marketing in Support of all Events		\$3,150
<b>Total</b>		<b>\$10,000</b>

**2017.10.10 – Email: "Balfour's Updated Proposal – Part 1"**

p.1: For RFP #7629420BA, Balfour offers a total MAG of \$135,000 (rings, announcements and regalia) with an annual 5% riser of the MAG. Balfour will also provide an additional 15% rebate for incremental sales above the MAG \$400,000 base target annually.



**2017.10.17/18 – Email: “One quick clarification” / “Final Clarification”**

Balfour agrees the modify the term of the MAG is as follows: MAG proposal for the first contract period (January 1, 2018- June 30 2018) will be a partial year equal to ½ of the proposed Year 1 MAG. Afterwards the MAGs will proceed with July 1, 2018 - June 30, 2019 as the Year 1 MAG, July 1, 2019 - June 30, 2020 as the Year 2 MAG, etc.

**2017.10.31 – VCU Procurement Services Graduation Product Negotiations – Balfour**

p.1, 1b:

“Balfour is pleased to offer VCU a one-time \$30,000 signing bonus at the beginning of the new agreement. This bonus is designed to help offset any costs associated with the conversion to Balfour Cap and Gown.

In addition, Balfour will provide an additional \$20,000 annual “Early Planning Bonus” with the following conditions:

- VCU supplies Balfour with an eligible graduate report (total number of expected graduates broken down by degree and major) by September 15 for Spring graduation and January 15 for Fall graduation of each year of the contract. (Balfour understands such information may not be 100% accurate as student plans may change. VCU would qualify for this bonus proved best efforts were made to fulfill this requirement.)”

p. 3, #2.a.i.: Balfour explains the regalia ordering timeline

p. 4, #2.a.ii.: Balfour explains the re-order process for restocking

p. 4, #2.a.iii.: Balfour explains the faculty rental order process

p. 5, #2.a.iv:

“All shipping to the VCU Bookstore or the University campus is included in Balfour’s pricing. Rush fees, expedited shipping fees, and return/restocking fees will not be charged.

p.5, #2.a.v:

“Balfour is responsible for all Faculty & Staff rental regalia. Balfour's state-of-the-art inventory management system allows for easy tracking and check-in of rental regalia. In the event that regalia is not returned, Balfour will notify the recipient of the missing return and work directly with them to easily return the regalia without penalty. The individual faculty/staff member is responsible for the return of their regalia and no fees or penalties will be passed on to the bookstore or University.”

p.5, #2.b:

“Balfour has a total team of 18 sales professionals. During the MCV and Monroe Park Grad Fair, Nathan Lavinka, Mike Foltz and Marian Kane will be the management team that will be on campus to help with distribution. We will also have 3 promotion specialists to assist with rings and announcements and 3 additional promotion specialists to help with cap and gown distribution.”

p.5, #3:

New Pricing for non-customized (professional) regalia is as follows:

Professional Doctor - (Gown-Cap-Tassel-Hood)

Sales Price to Bookstore: \$ 44.25

Suggested Mark-Up: \$ 17.70

Sales Price to Student: \$ 61.95

p.5, #4:

Balfour will adjust website regalia pricing to reflect the Bookstore’s retail pricing.

**2017.11.1 – Grad Product RFP Clarification**

p.1, 1b: “Balfour will comply with the request to remove the word exclusive.”

p.2, 2.a.i.:



"It is Balfour's commitment that every eligible graduate who wants to participate in commencement will be able to do so with appropriate regalia from Balfour. Our regalia team has been successfully outfitting graduates across North America and beyond for over 100 years. Our experience has rendered us with a full understanding of the intricacies, urgency and emotions that are tied to the ability to walk across the stage.

~~To ensure our obligations are met we take inventory positions very seriously. When we say we are committing to having 125% of anticipated regalia in inventory this equates to a substantial amount more than 25% above usage. Our formula for success is that we take the anticipated number of graduates and historic participation rates to generate an anticipated attendance number. We then take that anticipated attendance and input it into our sizing curve which generates the required inventory to ensure that we can outfit all of those graduates accounting for an additional attendance of 5% and one standard deviation in sizing. This becomes our inventory projection. Due to sizing variations and projections, this number equates to approximately the expected number of graduates plus an additional 20-25%. We refer to this amount as our Anticipated Regalia Needs.~~

The additional commitment VCU is that we are going to take the Anticipated Regalia Needs and increase this number by 125%. The end result is that in the months prior to the start of distribution our warehouse is going to be fully stocked with 140-150% of the regalia we will need for commencement!

This is not the end of the process. Throughout the entire graduation season we will be monitoring our internal inventory levels to ensure there are no outages and will manufacture additional regalia as needed to maintain appropriate stock levels for immediate response.

In the unlikely event that we need additional regalia that is not already sitting on the shelf waiting for the call to action, our wholly owned manufacturing facilities stand ready to want to ensure that Balfour does as well. Please confirm how you will ensure a seamless transition without a sales history. Please confirm that Balfour will treat any stock shortages where there is risk for regalia to arrive too late for a student to have it in time for commencement as a "critical need" meriting immediate production and next-day delivery."

p.3, 2.a.iii. Balfour will not assess the bookstore any late fees for late faculty orders. Typical orders require 48-72 hours but as commencement approaches this time is reduced to 24 hours and same-day shipping for critical orders.

p.3, 2.a.v. Balfour outlines the faculty follow-up procedure for unreturned regalia.

p.5, 7: Balfour will provide annual itemized invoices to demonstrate marketing expenditures totaling, at minimum, the totals proposed in the above marketing plan; these shall be delivered via email to the Contract Administrator by January 1 and July 1 of each calendar year of the contract. Any marketing efforts shall be approved in advance and in writing by the Contract Administrator if they deviate from said marketing plan.

**2017.11.15 – Email: Fwd: Final Clarification (dated 2017.11.14)**

Revised MAG received removing exclusivity and VCU spend requirements.

Virginia Commonwealth University  
 Graduation Product RFP  
 Price Worksheet

Contractor Instructions

The Offeror shall commit to pay a Minimum Annual Guarantee Royalty (MAGR) for the university Fiscal Years (FY) (beginning July 1 and ending June 30) as stipulated in the Request for Proposal (RFP)

	Year 1	Year 2	Year 3	Year 4	Year 5
Minimum Annual Guarantee Royalty Offer	\$ 135,000	\$ 141,750	\$ 148,838	\$ 156,279	\$ 164,093
MAG Royalty Rate on Total Contract Net Sales	27%	28%	29%	30%	30%

For RFP#7b29420BA, Balfour offers a total MAG of \$135,000 (rings, announcements and regalia) with an annual increase of 5% of the MAG. Balfour will also provide an additional 15% rebate for incremental sales above the MAG base target of \$400,000 annually. Incremental 15% rebate is calculated on net revenue less commissions, royalties and MAG payments.

Balfour confirms that the MAG proposal for the first contract period (January 1, 2018 to June 30, 2018) will be a partial year equal to 1/2 of the proposed Year 1 MAG. Afterwards the MAGS will proceed with July 1, 2018 - June 30, 2019 as the Year 1 MAG, July 1, 2019 - June 30, 2020 as the Year 2 MAG, etc.

Contractor Instructions

By signing below it is stated that the values above represent the Contractor's offer to Virginia Commonwealth University:

Contractor Signature - Scott T. Blevins

Senior Vice-President of Scholastic Products

14-Nov-17



**VCU**

# **Request for Proposals**

RFP #: 7629420BA

RFP Title #: Graduation Products

Issuing Agency: Virginia Commonwealth University

Issue Date: 06/29/2017

Closing Date: 07/25/2017 @ 2:00 PM



A VASCUPP Member Institution



## Request for Proposals RFP #7629420BA

**Issue Date:** 06/29/2017

**Title:** Graduation Products

**Send All Proposals To:** Virginia Commonwealth University  
RFP #7629420BA  
Attention: Brandon C. Augustine  
912 W Grace St, 5th floor  
Richmond, Virginia 23284-0327

**Proposals Shall Be Received Until:** 07/25/2017 @ 2:00 PM

**Direct ALL inquiries concerning this RFP to:** Brandon C. Augustine, Category Manager  
**baugustine@vcu.edu**

**Questions concerning this RFP must be received via email no later than:** 07/12/2017 @ 4:00PM

This Request for Proposals & any Addenda are posted on the eVa website at: <http://www.eva.virginia.gov>

HARD-COPY, ORIGINAL PROPOSALS MUST BE RECEIVED IN VIRGINIA COMMONWEALTH UNIVERSITY'S DEPARTMENT OF PROCUREMENT SERVICES ON OR BEFORE THE DATE AND TIME DESIGNATED ON THIS SOLICITATION. ELECTRONIC SUBMISSIONS AND FACSIMILE SUBMISSIONS WILL NOT BE ACCEPTED IN LIEU OF THE HARD-COPY, ORIGINAL PROPOSAL. VENDORS ARE RESPONSIBLE FOR THE DELIVERY OF THEIR PROPOSAL. PROPOSALS RECEIVED AFTER THE OFFICIAL DATE AND TIME WILL BE REJECTED. THE OFFICIAL DATE AND TIME USED IN RECEIPT OF RESPONSES IS THAT TIME ON THE CLOCK OR AUTOMATIC TIME STAMP IN THE DEPARTMENT OF PROCUREMENT SERVICES.

**IF PROPOSALS ARE HAND DELIVERED OR SENT BY FEDEX, UPS, OR ANY OTHER PRIVATE COURIER, DELIVER TO THE ADDRESS NOTED ABOVE: VIRGINIA COMMONWEALTH UNIVERSITY, RFP #7629420BA, ATTENTION: Brandon C. Augustine, 912 W. GRACE ST., 5<sup>TH</sup> FLOOR, RICHMOND, VA 23284-0327. IF USING US MAIL (NOT RECOMMENDED): IF PROPOSALS ARE MAILED VIA US MAIL, MAIL TO VIRGINIA COMMONWEALTH UNIVERSITY, RFP#7629420BA, ATTN: Brandon C. Augustine, BOX 980327, RICHMOND, VA 23298-0327. THE RFP NUMBER, DATE AND TIME OF PROPOSAL SUBMISSION DEADLINE, AS REFLECTED ABOVE, MUST CLEARLY APPEAR ON THE FACE OF THE RETURNED PROPOSAL PACKAGE.**

In Compliance With This Request for Proposals And To All Conditions Imposed Therein and Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services Described Herein In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation. Furthermore, The Undersigned Agrees Not To Start Any Work Relative To This Particular Solicitation Until A Resulting Formal Signed Purchase Order Is Received By The Contractor From University's Department of Procurement Services. Any Work Relative To This Request for Proposals Performed By The Contractor Prior To Receiving A Formal Signed Purchase Order Shall Be At The Contractor's Own Risk And Shall Not Be Subject To Reimbursement By The University.

**Signature below constitutes acknowledgement of all information contained through links referenced herein.**

**NAME AND ADDRESS OF COMPANY:**

_____	Date: _____
_____	By (Signature In Ink): _____
_____ Zip Code _____	Name Typed: _____
E-Mail Address: _____	Title: _____
Telephone: ( ____ ) _____	Fax Number: ( ____ ) _____
<b>Toll free, if available</b>	<b>Toll free, if available</b>
DUNS NO.: _____	FEI/FIN NO.: _____
REGISTERED WITH eVA: ( ) YES ( ) NO	SMALL BUSINESS: ( ) YES ( ) NO
VIRGINIA DSBSD CERTIFIED: ( ) YES ( ) NO	MINORITY-OWNED: ( ) YES ( ) NO
DSBSD CERTIFICATION #: _____	WOMEN-OWNED: ( ) YES ( ) NO

**A Pre-Proposal conference will not be held.**

## TABLE OF CONTENTS

### PAGE

I.	<u>PURPOSE</u>	4
II.	<u>BACKGROUND</u>	4
III.	<u>GOVERNING RULES</u>	5
IV.	<u>OPTIONAL USE CONTRACT</u>	5
V.	<u>THE UNIVERSITY</u>	5
VI.	<u>STATEMENT OF NEEDS</u>	5
VII.	<u>PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS</u>	14
VIII.	<u>PRICING SCHEDULE</u>	16
IX.	<u>SWAM COMMITMENT AND REPORTING REQUIREMENTS</u>	16
X.	<u>EVALUATION AND AWARD CRITERIA</u>	17
XI.	<u>GENERAL TERMS AND CONDITONS</u>	17
XII.	<u>SPECIAL TERMS AND CONDITONS</u>	17
XIII.	<u>CONTRACT ADMINISTRATION</u>	21
XIV.	<u>ATTACHMENTS</u>	22

## I. **PURPOSE:**

The intent and purpose of this Request for Proposals (RFP) is to seek proposals for qualified source for Graduation Products – Academic Regalia, Class Jewelry and Announcements for Virginia Commonwealth University.

The initial contract term shall begin January 15, 2018 for approximately five (5) and one-half (1/2) year(s) with the initial term ending on June 30, 2023, with the option of up to one (1), five (5) renewal, to be executed upon mutual signed agreement of both parties. It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement, at the contractor's discretion. Accordingly, any public body, public or private health or educational institution or lead-issuing institution's affiliated foundations may access any resulting contract(s) if authorized by the contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. Upon request, the Contractor shall notify the lead-issuing institution in writing of any entities accessing the contract. No modification of this contract or execution of a separate contract is required to participate. The Contractor shall provide usage reports for all entities accessing the Contract upon request. Participating entities shall place their own orders directly with the Contractor(s) and shall fully and independently administer their use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the lead-issuing institution. The lead-issuing institution 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 lead-issuing institution is not responsible for the acts or omissions of any entity, and will not be considered in default of the Agreement no matter the circumstances.

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

Additional information on cooperative procurement is available at:

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Cooperative\\_Procurement.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Cooperative_Procurement.pdf)

## II. **BACKGROUND:**

Approximate units for 2016:

### A. Class Jewelry

- |                           |                                |
|---------------------------|--------------------------------|
| • Ring Sale               | 343                            |
| • Total Approximate Value | \$Pending Response from Nathan |

### B. Academic Regalia

- |   |       |
|---|-------|
| • Approximate Unit Sales 1/2016 - 9/2016            | 4,467 |
| • Approximate Unit Sales 9/2016 - 12/2016           | 1,740 |
| • Total Approx. Unit Sales Between 1/2016 - 12/2016 | 6,207 |

### C. Announcements

- |                                 |                               |
|---------------------------------|-------------------------------|
| • Personalized                  | 940 sets (24 average per set) |
| • Standard                      | 1,525                         |
| • Total Approximate Sales Value | \$44,600                      |



### **III. GOVERNING RULES:**

This solicitation is issued in accordance with the provisions of:

- A. Purchasing Manual for Institutions of Higher Education and their Vendors (<https://vascupp.org/hem.pdf>)
- B. Rules Governing Procurement of Goods, Services, Insurance, and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia (<https://vascupp.org/rules.pdf>)

### **IV. OPTIONAL USE CONTRACT:**

The resulting contract(s) will be an optional use contract. VCU is in no way required to make purchases from the Contractor and may in its sole discretion purchase the identical and/or similar goods/services from other sources. Any estimates/quantities contained herein do not represent a purchase commitment by VCU.

### **V. THE UNIVERSITY:**

Information is available at:

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_The\\_University.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_The_University.pdf)

### **VI. STATEMENT OF NEEDS:**

This Section describes VCU's requested goods and/or services and the areas to be addressed in Offeror's Proposal. Proposal response must be written in the same order as outlined below. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities. Emphasis should be placed on completeness and clarity of content. Failure to submit all information requested may result in the elimination of the Proposal from consideration. Proposals that are substantially incomplete or lack key information may be rejected by VCU. Please note that utilization of the words "shall" or "must" indicates a mandatory requirement.

#### **A. Description of Requested Goods/Services and Proposal Response Requirements:**

##### **1. Overview:**

- a) The Contractor shall provide written statement acknowledging and agreeing to all mandatory requirement statements included in this Request for Proposal's Section VI. Statement of Needs for all statements that include the utilization of the words "shall" or "must". Absence of the required written acknowledgement and agreement statement in the proposal response may result in disqualification of your proposal response.
- b) Provide a brief history of the firm. Describe the firm's experience in providing graduation products and services to universities of comparable sizes with programs that are similar in complexity. Specify your firm's plan to meet the graduation and recognition product needs of Virginia Commonwealth University.
- c) The awarded Contractor shall provide a letter of intent to implement or not implement the second 5-year option to renew the agreement for the period July 1, 2023 to June 30, 2028 by no later than July 1, 2022.

##### **2. Class Jewelry:**

- a) The Contractor shall continue the University's program for the sale of class rings. See Appendix IV (Ring Specifications). This approved collection is known as the "Official" collection of rings for Virginia Commonwealth University.

**Describe the class ring program proposed for Virginia Commonwealth University.**

- b) The Contractor may offer additional class rings or jewelry for University consideration. The University, at its sole discretion, may opt to incorporate additional rings into the official collection in the future.

**Describe the collection of rings/jewelry that will be offered. State how the selection and the program will help enhance the customer's affinity with the University.**

- c) The Contractor should provide services typically associated with the sale of class rings and jewelry. These services should include design, production, sales, marketing and warranty.

**Describe your firm's design services, production techniques and quality control methods. Discuss the sales support services available for customers including the following:**

- (a) **Minimum deposit requirements**
- (b) **Methods of deposit payment**
- (c) **Accepted forms of credit**
- (d) **Finance programs**

**State the firm's warranty policy including the following:**

- (a) **Length and conditions of guarantee regarding defects in materials and workmanship**
  - (b) **Length and conditions of guarantee regarding stones and stone decorations.**
  - (c) **Provide conditions and associated charges for ring sizing and adjustments; for replacement of damaged rings; for restoring ring finish; and for changes in academic designation and graduation year.**
  - (d) **State the refund policy for students who fail to graduate in the year designated on the ring and the process for resolving disputes.**
- d) The Contractor should provide for the University's need to design additional rings and jewelry as necessary and work with the assigned committee as appropriate. The ring/jewelry styles may be re-designed as necessary to include new VCU marks and elements.

**Describe the contractor's capability to accommodate the University's need to design additional rings and jewelry when necessary.**

- e) Virginia Commonwealth University shall approve all designs, artwork, and mock-up rings and jewelry items prior to production. The jewelry selection will be featured as the "Official" collection to qualified students.
- f) The Contractor will have exclusive trademark rights for the sale of class jewelry to students. However, VCU Alumni (to include the MCV Alumni Association of VCU) may market class jewelry (exempting rings) bearing VCU's marks and logos to alumni under a separate agreement.

**Acknowledge and agree.**

- g) The title to dies and molds used in the manufacture of VCU class rings/jewelry shall be vested in the University. The Contractor shall retain all dies and molds and maintain such dies and molds in first class condition. In the event the Contractor determines that dies or molds are to be destroyed or otherwise disposed, the Contractor shall deliver dies and molds to Virginia Commonwealth University.
- h) Price changes for jewelry shall be allowed annually on June 15th of each year based upon the London PM fix for that date: <https://www.theice.com/marketdata/reports/178>

- i) The following formula shall be used to determine the change in price due to changes in the market price of gold:
- j)  $(\text{Change in gold market}) \times (\text{Gold Factor}) \times (\text{Ring Pennyweight (dwt)}) = \text{Price rounded to the nearest \$5 increment}$
- k) New ring retail prices shall take effect on July 1st of each year during the initial term or any renewal period.

**Describe the alloy metal content (with percentages of each metal) of your Silver rings.**

- l) Complete Pricing Schedule (Appendix III – tabs for Gold Rings & Silver, etc. Rings). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.
- m) In addition to your price submission, **list upcharges for all potential features that could be added to the base price of the ring.** Features might include full name engraving, stones, stone cuts, stone seal, panel tops, and special finishes.
- n) The Contractor should support jewelry sales by providing sales support materials.

**Describe the sales support and point of presentation material that will be provided at no charge including:**

- (a) **Point of presentation display cases**
- (b) **Ring samples**
- (c) **Website access to sale and support information**
- (d) **Toll-free phone numbers for service**
- (e) **Copy of the warranty and a care manual**
- (f) **Meeting regularly with representatives from VCU Alumni and Business Services to evaluate the program and make changes as needed**
- o) The Contractor shall provide a digital 3d model of any official class ring per the University's request.
- p) The Contractor should conduct a minimum of six (6) ring sales (three per semester) each contract year, to include at least two sales on the MCV Campus. Sales events on the Monroe Park Campus should include evening hours.

**State the minimum frequency, location and duration of on-campus ring sale events.**

- q) The Contractor should have a well-developed marketing plan for class rings and jewelry.
- r) The Contractor should sell class jewelry on campus in-person and as well as on the Internet.
- s) The Contractor may use locations in the University retail stores to support campus sales.

**Provide a marketing plan for class rings and jewelry.**

- (a) **Specify key events and approximate dates.**
- (b) **Describe the dollars and/or percentage off ring sales promotion including the amount off and the number of times the promotion will be offered.**
- (c) **Provide samples of the customized marketing media that will be used.**
- (d) **Describe the direct mail program.**
- (e) **Describe other marketing processes that will be used. State how the medium will be beneficial and approximately the frequency of use.**
- (f) **Provide a sample website or URL showing the proposed VCU website.**



**(g) Describe how the website will be used to market class rings, regalia and other products.**

- t) The contractor shall request written approval for all marketing materials from the VCU Business Services Marketing Manager or delegate at least two weeks in advance of the production of any marketing materials, and shall not produce any marketing materials without receiving approval.
- u) The Contractor shall provide an accounting of all VCU jewelry sales through all venues annually. (See Section “VI. 7. Reporting”)
- v) The Contractor shall offer a dollar discount on class rings to the VCU Alumni Association.

**Provide the dollar discount will your offer VCU Alumni on class rings.**

- w) The Contractor shall provide information on the ring ordering process to the bookstore and meet with the bookstore annually to discuss. The contractor shall provide clear messaging to students advising them where they can find additional information about the ring program.

**3. Academic Regalia:**

- a) The Contractor should propose a program for the solicitation and distribution of quality regalia for students to be sold through the VCU Bookstore.
  - (a) The Contractor should offer quality garments to be retained by the students (see Appendix V for the VCU collection).
  - (b) Regalia shall adhere to standards established by the American Council on Education.
  - (c) The regalia bundle should include a cap, gown, hood, and tassel for all degree levels.
  - (d) All hoods shall show the appropriate degree color.
  - (e) Tassels for graduates on the MCV Campus should show the appropriate degree color.
  - (f) Doctoral gowns for students receiving a PhD, MD, DDS, Pharm D and other designated doctoral degrees shall show the appropriate degree velvet color.
  - (g) The Contractor should solicit the necessary fitting and degree information from students.
  - (h) At a minimum, the Contractor should support the bookstore in distributing student regalia on each campus during a mid-semester multipurpose graduation event (“Grad Fair”).
  - (i) The Contractor should supply extra apparel for last-minute orders and adjustments the day of Commencement.
  - (j) The Contractor shall provide students the option of ordering regalia over the Internet.
  - (k) The Contractor shall provide illustrated wearing instructions with the apparel.
  - (l) All regalia sold through the Contractor’s ecommerce solution shall be equal to the price offered through the VCU Bookstore.
  - (m) The Contractor should provide two 6’ lightweight retractable signs for use at commencement to instruct students on how to properly wear regalia. Signage will be developed in conjunction with VCU Business Services but will be funded by contractor. These signs will be replaced as needed due to wear and tear or any change in regalia standards

**Describe the proposed student keeper regalia program.**

- (n) Provide sample apparel and manufacturing specifications for Medicine - M.D., Nursing - M.S., and Business Administration- B.S. from Virginia Commonwealth University. Include

cap, gown, hood and tassel.

- (o) Outline the program for soliciting fitting and degree information from students for the May and December Commencements.
  - (p) Describe how students will be notified about the fitting sessions and how size and degree information will be collected.
  - (q) Provide approximate key dates for both the May and December events.
  - (r) Describe the distribution program on each campus including approximate dates.
  - (s) Explain how the firm will ensure the appropriate amount of apparel is on-hand to meet the needs of all students.
  - (t) Describe your ecommerce solution for student regalia purchasing.
  - (u) Provide a sample of illustrated instructional information provided to customers about wearing the regalia.
  - (v) Confirm that contractor will fully fund and contribute to the design of two pop-up informational signs for use during commencement to assist students with the proper wearing of regalia.
  - (w) Complete Pricing Schedule (Appendix III – Regalia – Announcements tab). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.
- b) The Contractor should provide the University with a program for the solicitation, distribution and collection of high quality rental regalia for faculty, staff and others upon request, to be sold through the VCU Bookstore.
- (a) The Contractor should offer quality rental garments for faculty.
  - (b) All hoods shall show the appropriate degree color.
  - (c) The Contractor should support the University retail stores in soliciting the necessary fitting and degree information from faculty.
  - (d) Each rental order should be custom packed showing the customer's name.
  - (e) The Contractor shall supply extra apparel for last-minute orders and adjustments the day of Commencement.
  - (f) The Contractor should provide the option of ordering faculty and staff regalia using the Internet.
  - (g) The bookstore shall not be required to pay for rental apparel that was not used.
  - (h) The Contractor should provide wearing instructions with the apparel.
  - (i) The Contractor shall provide rental regalia for the Platform Party, not to exceed an average of 25 per semester over the length of the contract. The average of individuals included in this grouping for the previous two years has been 14. These items shall be pressed, placed in individual garment bags, and clearly labelled with the name of the individual, contents of the bag, and initials of the manager who verified the contents. This regalia will be delivered in person by a manager and checked in with the VCU Bookstore's General Merchandise Manager or other individual specified by the University. Names, heights, degrees, disciplines and institutions will be provided by the VCU Bookstore.
  - (j) The contractor shall provide up to six complimentary "extra" sets of rental regalia and tams each semester, at the request of the VCU Bookstore, to be on hand in the event of last-minute changes or issues with Platform Party regalia (this includes members of the VCU Board of Visitors who have keeper regalia).

**Describe the proposed faculty rental regalia program.**

- (a) Provide sample apparel for a PhD from Virginia Commonwealth University. Include cap, gown, hood and tassel.
  - (b) Outline the program for soliciting fitting, school and degree information for the May and December commencements.
  - (c) Provide approximate cut-off dates for faculty and staff rental for the May and December ceremony.
  - (d) Describe how each rental order will be packed for distribution.
  - (e) Describe the distribution program on each campus including key delivery dates and how individual orders will be shipped.
  - (f) Explain how the firm will ensure the appropriate amount of apparel is on-hand to meet the needs of faculty and staff, including how last-minute requests will be satisfied.
  - (g) Describe how the Internet will be used for faculty and staff ordering.
  - (h) Confirm that the firm will provide additional verifications of all VIP regalia orders for commencement, to include pre-shipping and post-receipt on-site review of orders at the University's sole discretion.
- c) The University and the retail stores shall not be responsible for uncollected apparel.
  - d) The Contractor shall offer commemorative sashes for student marshals.

**Provide a sample of the proposed approach and discuss any available options. State the price per unit for your proposal.**

- e) The Contractor should offer high quality custom apparel for purchase by customers.

**Provide a sample of your most popular custom-tailored PhD cap, gown, hood and tassel. Provide a plan to market custom regalia to the faculty and include a brochure and pricelist for custom apparel.**

- f) The Contractor should promote and market the regalia program.

**Acknowledge and agree.**

- g) Complete Pricing Schedule (attached Excel document). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.
  - h) The University reserves the right to request modification to regalia specifications.
  - i) VCU marks and logos are registered with government agencies and currently licensed through the Collegiate Licensing Company (CLC). Regalia prices shall include all applicable licensing fees. The current CLC licensing rate is 12% per unit and may change periodically. Contractor will receive notice from CLC of any licensing fee changes. The University reserves the right to change Licensing Vendors and will provide notice of said change at its earliest convenience. The contractor shall comply with any Licensing vendor change requirements and University Trademarks and Licensing Policies.
4. Announcements and Stationery:
- a) The Contractor should provide a comprehensive program of standard and personalized graduation announcements and the accompanying stationery including thank you cards, name cards, etc. The Contractor should offer announcements for both the May and December Commencement ceremonies.

**Describe the graduation announcement and stationery program proposed.**

- (a) Provide samples of standard announcements and of personal announcements. Include



accompanying stationery as appropriate.

- (b) Provide information about the design options and paper stock.
- (c) Specify the return-for-credit option for the return of unsold standard announcements sold through the bookstores.
- (d) Provide key order-by and ship-by dates for announcements.
- (e) Outline the program for soliciting announcement orders for the May and December commencements.
- (f) Describe the firm's ability to include information regarding a diploma ceremony with any marketing material mailed to candidates. Provide additional costs, if any.
- b) A designated University representative shall pre-approve all copy prior to printing the announcement for each Commencement.
- c) The Contractor shall provide VCU with the option of making modifications to the design of the announcements as needed.
- d) The Contractor shall provide the option of ordering personalized announcements using an ecommerce solution.

**Describe the announcement and stationery ordering options available on the Internet.**

- e) The Contractor should promote and market the announcement program.

**Describe how the announcements will be marketed. Include how the Internet will be used for marketing and ordering announcements.**

**Complete Pricing Schedule (attached Excel document, tab: Announcements). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.**

5. Recognition Gifts:

- a) The Contractor should provide appropriate gifts for sale recognizing and commemorating the graduation event. The mementos might include date tassels, stoles, etc.

**Describe the graduation gifts and accessories program proposed. State how the products will be marketed.**

6. Marketing:

- a) The Contractor should develop a marketing plan each year. Marketing materials should be customized for VCU. The Contract should provide a website to support VCU graduation products.

**Describe or summarize the firm's overall marketing strategy.**

- (a) Provide a sample marketing plan for products and services.
- (b) Describe the strategies used to nurture a sense of tradition and to build a feeling of pride and exclusivity for individuals using with the VCU products.
- (c) Provide a sample of the custom marketing materials that will be used at VCU.
- (d) Describe the mailing campaign. State the number, timing and target audience of the mailings.
- (e) Describe customer incentive programs.
- (f) Describe how the internet, e-mail, social media will be used to market products.
- (g) Acknowledged the firm is willing to accept all costs associated with marketing the

products and services offered.

- b) The Contractor should market products through the VCU Bookstores. The stores may add a markup, approved by the University, on products sold through the stores. The University stores will support the ring and regalia order and delivery process.

**Acknowledge and agree.**

- c) All mailing lists/files or other media containing personal information about students, alumni, faculty and staff shall be considered protected data and are intended for use as directed in this RFP. Any other use of this protected data is strictly prohibited without written permission of Virginia Commonwealth University.
- d) The Contractor shall, at minimum, meet with the bookstore prior to every graduation, in person or virtually, to discuss graduation logistics. In addition, the Contractor shall attend a Grad Fair preparation meeting, in person or virtually, with the bookstore, alumni, and other partners.

**7. Reporting:**

- a) The Contractor shall provide an accounting summary reports detailing unit sales through all venues. At a minimum the reports shall include the following (to be finalized upon award of contract):
  - (a) Class ring sales by campus, to include but not be limited to ring style, metal, purity, sales price, quantity, source (online, in-person, etc.), customer type (alumni, student by year, etc.).
  - (b) Personalized announcement sales by campus;
  - (c) Regalia sales by campus, and
  - (d) Standard announcement sales by campus.
- b) Contractor should formally meet with representatives from the University at least annually to evaluate services and to review accounting reports. The "Annual Program Review" will consider the status of the current program and recommend action plans as appropriate. Topics may include issues related to sales trends, unit sales summary reports, marketing and evaluation results.
- c) For this contract, Contractor's fiscal reporting period shall comply with the University's Fiscal Year which is July 1 through June 30. All monthly reporting shall consist of data for the complete period, from the first day of the calendar month through the last day of the calendar month.
- d) The Contractor shall e-mail a monthly report in a spreadsheet format to the University. The monthly reports shall be submitted by the 10th of each month following the reporting period.
- e) Should the report due date fall on a weekend or holiday, reports and/or payments are due on the next business day.
- f) On the monthly statement, Contractor should explain discrepancies with a deviation of 3% from prior year's financial accomplishments.
- g) Reports required from the Contractor shall be submitted on time. A three-day grace period will be given up to two times each year. In the event a report is submitted more than three days past the required deadline or is submitted late more than two times per Fiscal Year, without reasonable cause, the University may impose a \$1,000 penalty.
- h) The Contractor's Accounting Liaison should meet with the University upon request to review any operating statements or reports to identify issues and to develop an action plan

for resolution. Any operating statements requiring adjustments because of a review audit shall be identified and reflected on the next reporting month.

**The University should be informed by the Contractor of the schedule of the Contractor's audit of the records and operations at the University. The University shall have the option to participate in the Contractor's audits and shall receive a full audit report of findings regardless of the University participation.**

- i) The Contractor should submit all reports and payments to:

VCU Retail Services – Accounting Department  
Virginia Commonwealth University  
Box 980208  
Richmond, VA 23298-0208

- j) Electronic reporting and payment submission addresses will be determined upon contract award.

**Acknowledge and accept the Section 7 – Reporting, all statements (a-k).**

8. Financial:

- a) All pricing shall include University royalty payments and licensing fees where appropriate.
- b) The Contractor shall propose a royalty on the gross total items sold and minimum annual royalty guarantee. An amount equal to 1/12th of the minimum annual royalty payment is due monthly by the 10th of each month. **Complete Pricing Schedule (Appendix III – MAG tab).**
  - (a) All net sales (gross sales minus taxes), including but not limited to cash, check, internal transfers, gift card redemption and debit/credit card, shall be recorded as revenues on financial reports at retail values.
  - (b) Royalties shall be computed on net sales.
  - (c) Royalties shall be paid to the University in the period they were earned and charged, and not upon collection date. The Contractor shall not be reimbursed for royalties paid on uncollected accounts.
  - (d) Uncollectable funds shall be the responsibility of the Contractor.
  - (e) Contractor should provide the University a Minimum Annual Royalty Guarantee for each contract year, based on the University's Fiscal Year, for a period of five (5) years per response submitted in the Proposed Price spreadsheet, as negotiated, which will become document of record for contractual purposes.
  - (f) After the initial fixed Minimum Annual Royalty Guarantee agreement term, the final initially agreed upon contract year Minimum Annual Royalty Guarantee will increase by 5% per year thereafter.
  - (g) Contractor should pay the Minimum Annual Royalty Guarantee amount in equal monthly installments by the 10<sup>th</sup> of each calendar month based upon the University's Fiscal Year. Should the payment due date fall on a weekend or holiday, payments are due on the next business day.
  - (h) Contractor shall monitor sales and calculate royalties payable to the University for each University Fiscal Year. If, and to the extent, that royalties due the University exceed the Minimum Annual Guarantee, the Contractor should pay the excess amount by August 10.
  - (i) Minimum Annual Royalty Guarantee shall be computed on total net sales of contract. (Please complete Appendix III, MAG tab)
- c) The Contractor shall pay the licensing fee on all emblematic merchandise.

**Acknowledge and agree.**

9. Transition:

- a) The Contract should provide a seamless transition to the new agreement.

**As necessary, describe how your firm will implement the new agreement. Provide estimated dates for key tasks.**

- b) The Contractor shall be prepared to provide regalia for the May 2018 Commencement.
- c) The Contractor shall be prepared to offer the "Official" VCU class ring(s) during the Spring 2018.

10. Experience and Qualifications of Firm:

- a) Firm should provide:

- (a) List of three references for whom similar services were provided, preferably of public institutions of higher education or a similar sized organization.

- (b) Provide a list of institutions of higher education with which the firm has a signed term contract.

- (c) Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of VASCUPP Members can be found at

- <http://www.vcu.edu/procurement/purchasing/contracts/aboutvascupp.html>.

11. Other related goods/services:

**Describe other related goods and/or services provided by your firm. Provide information to demonstrate how these goods and/or services could benefit the institution and include the associated pricing for the term of the contract. Provide information to address how newly introduced products and services would be offered and included in the contract. Include information on your ability to provide most favored nations pricing.**

12. Marketing:

- a) VCU marks and logos are registered with government agencies and currently licensed through the Collegiate Licensing Company (CLC). All merchandise prices shall include all applicable licensing fees. The current CLC licensing rate is 12% per unit and may change periodically. Contractor will receive notice from CLC of any licensing fee changes. The University reserves the right to change Licensing Vendors and will provide notice of said change at its earliest convenience. The Contractor shall comply with any Licensing vendor change requirements and University Trademarks and Licensing Policies.
- b) All marketing or use of licensed materials of any type must be approved in writing by the Business Services Marketing Manager.

**VII. PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS:**

A. Instructions are as follows:

1. In order to be considered for award, proposal submissions must contain, at minimum, the following:
  - a) Company Qualifications and Experience.
  - b) Responses to all requirements listed in the Statement of Needs above.
  - c) A list of three (3) references for whom similar services were provided, preferably institutions of higher education, or similarly-sized organizations.
  - d) Pricing Schedule as required in Section VIII.

- e) SWaM documentation as required in Section XI.
2. Complete and return page 2 of the RFP. Proposals shall be signed by an authorized representative of the Offeror. By submitting a Proposal, Offerors certify that all information provided in response to the Request for Proposals is true and accurate. Failure to provide information required by this Request for Proposals will ultimately result in rejection of the Proposal.
  3. Complete and return signed addenda acknowledgments (if applicable).
  4. Submit **ten (10) original hard copy (paper) document** of the entire Proposal, including all attachments and all proprietary information (see #7 below). Submit one (1) unsecured, electronic copy (on a disc or flash drive) of the entire Proposal including all attachments and **EXCLUDING ANY PROPRIETARY INFORMATION**. This disc or flash drive must be clearly marked on the outside that it **excludes** proprietary information.
  5. Submit an unsecured electronic copy (on a disc or flash drive) of the entire Proposal, including all attachments and proprietary information.
  6. All information requested must be submitted. Failure to submit all information requested may result in the University requiring prompt submission 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 University, at the University's sole discretion.
  7. If applicable, the outside of the Proposal must be marked to clearly denote proprietary information is contained in the documents. **Written notice of proprietary information must be submitted as the first page of the Offeror's Proposal.** Notice must specifically identify the applicable portions of the Offeror's Proposal that contain data or materials to be protected and shall state the reasons why protection is necessary. In addition, the specific (i.e. specific words, figures or paragraphs) proprietary or trade secret material submitted, must be identified on the applicable page(s) within the Offeror's Proposal, by some distinct method, such as highlighting, underlining, etc. **The classification of an entire Proposal document, line item prices and/or total Proposal prices as proprietary or trade secrets is not acceptable and may result in rejection and return of the Proposal, at the University's sole discretion.**
  8. Invoicing and Payment: Firm must complete Appendix II which is available at: [http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Appendix\\_2.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Appendix_2.pdf)
  9. Communications regarding this Request for Proposals (RFP) shall be formal from the date of the issuance for this RFP, until either a Contractor has been selected or the University Procurement Services Department rejects all proposals. Formal communications shall be directed to the University Procurement Department only. Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than Procurement Services Department representative may result in the offending Offeror's Proposal being rejected.
  10. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to conduct an oral presentation of their proposal to VCU. Oral presentations are an option and may or may not be required. Should an oral presentation be required, VCU will designate the date and location for the presentation; the date is critical and alternative dates will not be available. Offerors who are invited to conduct an oral presentation shall include the individual(s) who would be the primary point of contact for VCU, on the Offerors presentation team. VCU reserves the right to rescore proposals following oral presentations.
  11. The version of the solicitation issued by the Virginia Commonwealth University Purchasing Department as amended by any 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 the Virginia Commonwealth University Purchasing



Department 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, Virginia Commonwealth University reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal. If the modifications 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 the Purchasing Department.

13. Additional information is available at:  
<http://go.vcu.edu/procurement-purchasing>

#### **VIII. PRICING SCHEDULE:**

Offeror shall complete and submit Appendix III.

#### **IX. SMALL, WOMEN-OWNED, AND MINORITY-OWNED BUSINESS COMMITMENT (SWaM):**

It is the policy of the Commonwealth of Virginia that 42% of its purchases be made from small businesses to contribute to the establishment, preservation, and strengthening of small businesses, and businesses owned by women and minorities, and to encourage their participation in VCU 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 or other contractual opportunities.

**Offerors must submit complete Appendix I (see section XIV: Attachments) unless offeror is a DSBSD certified small business. DSBSD certified small businesses must include their certification number on the coversheet of this RFP, but are not required to complete Appendix I.**

**Use of Subcontractors:** If the Offeror intends to use subcontractors to perform any portion of the work described in this RFP, the Offeror must clearly so state. VCU is placing an increased emphasis on its SWaM (Small, Women, and Minority Owned) business program and is interested in identifying any potential opportunities that may be available to engage SWaM vendors to be certified by the Virginia Department of Small Business and Supplier Diversity (DSBSD) through new or existing contracts.

**Identify and list any such opportunities that your firm would commit to if awarded this Contract in Appendix I - Participation in VCU Procurement Transactions Small Businesses and Businesses Owned by Women and Minority.** The Offeror's response must include a description of which portion(s) of the work will be sub-contracted out and the names and addresses of potential Subcontractor(s) under the Contract.

#### **SWaM REPORTING AND DELIVERY REQUIREMENTS:**

Unless the Contractor is a DSBSD certified small business, the Contractor shall submit quarterly reports on the direct involvement of Department of Small Business and Supplier Diversity (DSBSD) certified SWaM Businesses in the performance of the Contract. The report shall specify the actual dollars spent to date with Small Businesses, Women-Owned Businesses, and Minority-Owned Businesses based upon the Contractor's commitment for utilization of DSBSD SWaM Businesses.

The Contractor shall provide this information to:

Virginia Commonwealth University  
Procurement Services Office  
Attn: SWaM Coordinator  
912 W. Grace Street, POB 980327  
Richmond, VA 23284  
Email: [swamreporting@vcu.edu](mailto:swamreporting@vcu.edu)

Failure to submit the required information will be considered a contract compliance issue and will be addressed accordingly. In addition, failure to submit the required information will result in invoices being returned without payment.

## **X. EVALUATION AND AWARD CRITERIA:**

Proposals will be evaluated based upon the information provided in the Offeror's Proposal using the criteria specified below. Negotiations shall be conducted with Offerors so selected. After negotiations have been conducted with each Offeror so selected, the VCU shall select the Offeror which, in its opinion, has made the best offer, and shall award the contract to that Offeror. The University 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 reason why a particular Proposal was not deemed to be the most advantageous (Governing Rules Section 49.D). Should the University determine in writing and in its sole discretion that only one Offeror has made the best proposal, 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 RFP, and the Offeror's response thereto. VCU reserves the right to award to multiple offerors, should such an award benefit the University.

Notice of Award(s) or Notice of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov>.

### **EVALUATION CRITERIA**

- |                                  |     |
|----------------------------------|-----|
| 1. Qualifications and Experience | 30% |
| 2. Methodology/Approach          | 30% |
| 3. Pricing Schedule              | 30% |
| 4. SWaM Status/Utilization*      | 10% |

*\*Offeror's status as a Virginia certified SWaM Business or the Offeror's plans to utilize Virginia DSBSD-certified SWaM Businesses in the Offeror's performance of the contract.*

## **XI. GENERAL TERMS AND CONDITIONS:**

General Terms and Conditions can be viewed at:

<http://procurement.vcu.edu/document-library/business-with-vcu/>

## **XII. SPECIAL TERMS AND CONDITIONS:**

- A. **ADDITIONAL USERS OF CONTRACT:** It is the University's intent to provide other Virginia Association of State College and University Purchasing Professionals (VASCUPP) with access to the University's Agreements and to provide Contractors with opportunities to do business with other VASCUPP institutions of higher education.

To that end and if agreeable with the Contractor, the following Colleges and Universities listed are the VASCUPP institutions and may have access to any agreement resulting from this solicitation: College of William and Mary, University of Virginia, George Mason University, Virginia Military Institute, James Madison University, Old Dominion University, Virginia Polytechnic Institute & State University and Radford University. Upon written request from a VASCUPP institution, the Contractor may allow access to the Contract. Although the University desires to provide access on such contract to VASCUPP, the Contractor is not required to provide such access. A firm's willingness to provide this access to VASCUPP members will not be a consideration in awarding this contract. Although the VASCUPP Agencies may have access to any resulting Agreement, VASCUPP is not bound to use the Agreement and any use of the Agreement is strictly optional.

If the VASCUPP institutions choose to access the Agreement and the Contractor agrees to such access, the terms and conditions of the Agreement will be in full force and effect as between the VASCUPP institutions and the Contractor. VCU will have no responsibility for the resolution of any contractual disputes, or for payment for services rendered which may arise from a VASCUPP institution accessing the Agreement. The Contractor understands and agrees that it shall not have

any recourse against VCU with respect to any claim it may have against another VASCUPP institution that accessed this Agreement.

- B. ADVERTISING: In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services to Virginia Commonwealth University will be used in product literature or advertising. The Contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
- C. AUDIT: The Contractor shall retain all books, records, 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 agency, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- D. AVAILABILITY OF FUNDS: It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- E. AWARD: The Commonwealth shall typically engage in individual discussions with two or more Offerors deemed fully qualified, responsible and suitable on the basis of initial responses and with emphasis on professional competence, to provide the required services. Repetitive informal interviews shall be permissible. Such Offerors shall be encouraged to elaborate on their qualifications and performance data or staff expertise pertinent to the proposed project, as well as alternate concepts. At the discussion stage, the public body may discuss nonbinding estimates of total project costs, including, but not limited to, life-cycle costing, and, where appropriate, nonbinding estimates of price for services. Proprietary information from competing Offerors shall not be disclosed to the public or to competitors. At the conclusion of the informal interviews, on the basis of evaluation factors published in the Request for Proposals and all information developed in the selection process to this point, the purchasing agency shall select, in the order of preference, two or more Offerors whose professional qualifications and proposed services are deemed most meritorious. Negotiations shall then be conducted, beginning with the Offeror ranked first. If a contract satisfactory and advantageous to the purchasing agency can be negotiated at a price considered fair and reasonable, the award shall be made to that Offeror. Otherwise, negotiations with the Offeror ranked first shall be formally terminated and negotiations conducted with the Offeror ranked second, and so on, until such a contract can be negotiated at fair and reasonable price. 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 and suitable than the others under consideration, a contract may be negotiated and awarded to that Offeror.

Notice of Award(s) or Notice of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov> for a minimum of 10 days.

- F. BEST AND FINAL OFFER (BAFO): At the conclusion of negotiations, the Offeror(s) may be asked to submit in writing, a best and final offer (BAFO). After the BAFO is submitted, no further negotiations shall be conducted with the Offeror(s). The Offeror(s) proposal will be re-evaluated to combine and include the information contained in the BAFO. The decision to award will be based on the final evaluation including the BAFO.
- G. CANCELLATION OF CONTRACT: The purchasing agency reserves the right to cancel and terminate any resulting contract, in part or in whole, at any time during the contract including optional renewal periods, without penalty, upon 60 days written notice to the Contractor. 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. The Contractor may provide written notice to the purchasing agency to cancel or terminate any resulting contract effective only at the close of a contract year (June 30) provided a minimum of twelve (12) months written notice is provided to the purchasing agency. 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.

- H. **COMMUNICATIONS:** Communications regarding this Request for Proposals (RFP) shall be formal from the date of issue for this RFP, until either a Contractor has been selected or the University Purchasing Department rejects all proposals. Formal communications shall be directed to the University Purchasing Department.

Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than a Purchasing Department representative may result in the offending Offeror's proposal being rejected.

I. **ELECTRONIC COPIES OF PROPOSALS:**

The successful Contractor may be required to provide the VCU Department of Procurement Services with a copy of the Contractor's entire original proposal (to include all attachments), and all subsequent correspondence (i.e. responses to requests for clarification and documents generated through the negotiation process) in an unsecured electronic format (i.e. email, disc – CD or DVD or flash drive). **The Contractor SHALL NOT INCLUDE ANY PREVIOUSLY IDENTIFIED PROPRIETARY INFORMATION IN THE ELECTRONIC FORMAT; VCU will post the Contractor's original proposal, and all subsequent correspondence on the VCU Department of Procurement Services Website, VCU shall not be responsible for the Contractor's failure to exclude proprietary information submitted in the unsecured electronic format).**

- J. **eVA BUSINESS-TO-GOVERNMENT CONTRACTS AND ORDERS:** The solicitation/contract will result in purchase order(s) with the eVA transaction fee specified below assessed for each order.

1. For orders issued July 1, 2011 thru June 30, 2013, the Vendor Transaction Fee is:
  - a) DSBSD-certified Small Businesses: 0.75%, Capped at \$500 per order.
  - b) Businesses that are not DSBSD-certified Small Businesses: 0.75%, Capped at \$1,500 per order.
2. For orders issued July 1, 2013, and after, the Vendor Transaction Fee is:
  - a) DSBSD-certified Small Businesses: 1%, Capped at \$500 per order.
  - b) Businesses that are not DSBSD-certified Small Businesses: 1%, Capped at \$1,500 per order.

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, approximately 30 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.

The eVA Internet electronic procurement solution, website portal [www.eva.virginia.gov](http://www.eva.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The portal is the gateway for vendors to conduct business with state agencies and public bodies.

Vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet e-procurement solution and agree to comply with the following: If this solicitation is for a term contract, may provide an electronic catalog (price list) or index page catalog for items awarded. The format of this electronic catalog shall conform to the eVA Catalog Interchange Format (CIF) Specification that can be accessed and downloaded from [www.eVA.virginia.gov](http://www.eVA.virginia.gov). Contractors should email Catalog or Index Page information to [eVA-catalog-manager@dgs.virginia.gov](mailto:eVA-catalog-manager@dgs.virginia.gov).

- K. **IDENTIFICATION OF PROPOSAL:** The proposal package should be identified as follows:

From:

Name of Offeror

Due Date

Time

Street or Box Number

RFP No.

City, State, Zip Code +4

RFP Title

Name of Contract / Purchase Officer:

The package should be addressed as directed on Page 2 of the solicitation.

If a proposal is not clearly identified, the Offeror takes the risk that the proposal 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.

- L. **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.
- M. **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 disqualified 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 intrauniversity mail system. It is the sole responsibility of the Offeror to insure that its proposal reaches the issuing office by the designated date and hour.
- N. **POLICY OF EQUAL EMPLOYMENT**: Virginia Commonwealth University is an equal opportunity/affirmative action employer. Women, Minorities, persons with disabilities are encouraged to apply. The University encourages all vendors to establish and maintain a policy to insure equal opportunity employment. To that end, Offerors should submit along with their proposals, their policy of equal employment.
- O. **PRODUCT INFORMATION**: The Offeror shall clearly and specifically identify the product being offered and enclose complete and detailed descriptive literature, catalog cuts and specifications with the proposal to enable the Commonwealth to determine if the product offered meets the requirements of the solicitation. Failure to do so may cause the proposal to be considered nonresponsive.
- P. **PROPOSAL ACCEPTANCE PERIOD**: Any proposal in response to this solicitation shall be valid for sixty (60) days. At the end of the sixty (60) days, the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is cancelled.
- Q. **PROPOSAL PRICES**: Proposal prices shall be in the form of a firm unit price for each item during the contract period.
- R. **PROTEST**: Any Offeror who desires to protest the award or decision to award a Contract shall submit the protest in writing to:

Director of Procurement Services  
Virginia Commonwealth University  
912 West Grace, 5<sup>th</sup> Floor  
Richmond, VA 23284

VCU will announce the award utilizing the Commonwealth of Virginia's e-Procurement system (eVA). The protest must be received no later than ten (10) days after the award or the announcement of the decision to award, whichever occurs first. However, if the protest of any actual or potential Offeror depends in whole or in part upon information contained in public records pertaining to the procurement transaction that are subject to inspection under the Rules Governing Procurement of Goods, Services, Insurance, and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia Governed by Subchapter 3 of the Restricted



Higher Education Financial and Administrative Operations Act,, Chapter 4.10 (§23-38.88 et seq) of Title 23 of the Code of Virginia, §34, then the time within which the protest shall be submitted shall expire ten (10) days after those records are available for inspection by such Offeror under §34, or at such later time as provided in this section.

VCU Notices of Award(s) or Notices of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov>.

No protest shall lie for a claim that the selected Offeror is not a responsible Offeror. The written protest shall include the basis for the protest and relief sought.

The VCU Director of Procurement Services shall issue a decision in writing within ten (10) days of receipt stating the reasons for the action taken. This decision shall be final unless the Offeror appeals within ten (10) days of receipt of the written decision by instituting legal action as provided in Section 54 of the Governing Rules.

Nothing in this clause shall be construed to permit a proposer to challenge the validity of the terms or conditions of the RFP. "Days" as used in this paragraph refer to calendar days. If a deadline falls on a Saturday or Sunday, the next business day shall be considered to be the deadline.

- S. **QUANTITIES:** Quantities set forth in this solicitation are estimates only, and the Contractor shall supply at proposal prices actual quantities as ordered, regardless of whether such total quantities are more or less than those shown.
- T. **REFERENCES:** Offerors shall provide a list of at least 3 references where similar goods and/or services have been provided. Each reference shall include the name of the organization, the complete mailing address, the name of the contact person and telephone number.
- | ORGANIZATION | ADDRESS | CONTACT PERSON | TELEPHONE |
|--------------|---------|----------------|-----------|
| 1.           |         |                |           |
| 2.           |         |                |           |
| 3.           |         |                |           |
- U. **RENEWAL OF CONTRACT:** This contract may be renewed by the Commonwealth upon written agreement of both parties for one five (5) year term under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration.
- V. **SPECIAL EDUCATIONAL OR PROMOTIONAL DISCOUNTS:** The Contractor shall extend any special educational or promotional sale prices or discounts immediately to the Commonwealth during the term of the contract. Such notice shall also advise the duration of the specific sale or discount price.
- W. **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.
- X. **WARRANTY:** All materials and equipment shall be fully guaranteed against defects in material and workmanship for a minimum period of 60 days following date of delivery. Notification will state either that the Contractor shall replace or correct. If the Contractor is required to correct or replace, it shall be at no cost to the Commonwealth and shall be subject to all provisions of this clause to the same extent as materials initially delivered.

### **XIII.CONTRACT ADMINISTRATION:**

Upon award of the contract VCU shall designate, in writing, the name(s) of the Contract Administrator(s) who shall work with the contractor in formulating mutually acceptable plans and standards for the delivery, installation and on-going service and/or maintenance that may be required.

- A. The Contract Administrator shall use all powers under the contract to enforce its faithful performance. The Contract Administrator shall determine the amount, quality and acceptability of work and shall decide all other questions in connection with the work.
- B. All direction and orders from VCU shall be transmitted through the Contract Administrator, or his designee. However, the Contract Administrator shall have no authority to order changes in the work which alter the concept or scope of the work or change the basis for compensation to the contractor.

**XIV. ATTACHMENTS:**

**Appendix I: SWaM Form** – Participation in State Procurement Transactions by Small Businesses and Businesses Owned by Women and Minorities:

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Appendix\\_1.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Appendix_1.pdf)

**Appendix II: Invoicing and Payment:**

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Appendix\\_2.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Appendix_2.pdf)

**Appendix III: Product Pricing Schedule** – see attached.

**Appendix IV: Ring Specifications** – see attached.

**Appendix V: Current Regalia Collection** – see attached.

Virginia Commonwealth University  
 Graduation Product RFP  
 Price Worksheet

**Contractor Instructions**

The Offeror shall complete the highlighted cells below

The following formula will be used to determine the change in price due to increases in the gold market:  
**(Change in gold market) x (Gold Factor) x (Ring Pennyweight (dwt)) = Price rounded to the nearest cent**  
 The following factors will be used for each karat of gold:

**\$1000/oz Fixed Gold Price (for RFP calculation purposes only)**



*Future price increase/decrease will be based London PM Fix.*

Gold	Purity		
	10K	14K	18K
Gold Factor per \$1			

Sample Ring Pricing	dwt	oz	Student Price
Traditional-style Ring (10K Gold, to include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc.)	12	0.658	
	10	0.549	
	8	0.439	
	4	0.219	
	2	0.110	

market price of gold.  
**nearest \$5 increment**

		Men's	
		Large Traditional Scholar with Signet Top (SCHOL L SIG)	Large Traditional Scholar with Stone (SCHOL L STN)
			
Pennyweight (dwt)		12.5	11
Available Metals	10K Yellow and White Gold	X	X
	14K Yellow and White Gold	X	X
	18K Yellow and White Gold	X	X
	Balfour Premium Silver	X	X
	Balfour Imperium with Gold	X	X
	Celestrum	X	X
Metal Finish	Antique	X	X
	Natural	X	X
Side Design 1 (traditional ring styles only)		choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs
Side Design 2 (traditional ring styles only)		choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs
Side Types Available (applies to signet ring styles, not traditional)	Degree/GradYear/ Greek Sides	NA	NA
	Split Year Date	NA	NA
	Plain Sides	NA	NA
Personalization Side 1		degree letters or grad year	degree letters or grad year
Personalization Side 2		degree letters or grad year	degree letters or grad year
Stone	Black Onyx	NA	X
Stone Cut	Smooth	NA	X
	Faceted	NA	NA
	Fireburst	NA	NA
Engraving		alpha/numeric and Greek available	alpha/numeric and Greek available

Stone Details	
---------------	--





# Commonwealth University Official Ring Specifications

Commonwealth Brands, Inc. dba Balfour

	Women's			
Large Signet	Small Traditional Scholar with Signet Top (SCHOL S SIG)	Small Traditional Scholar with Stone (SCHOL S STN)	Small Signet	Illusion
				
7	8.5	8	4	4
X	X	X	X	X
X	X	X	X	X
X	X	X	X	X
X	X	X	X	X
X	X	X	X	X
X	X	X	X	
X	X	X	X	X
X	X	X	X	X
NA	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	NA
NA	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	NA
X	NA	NA	X	NA
X	NA	NA	X	NA
X	NA	NA	X	NA
degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year
degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year
NA	NA	X	NA	X
NA	NA	X	NA	NA
NA	NA	NA	NA	X
NA	NA	NA	NA	NA
alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available

				four .02 carat + four .015 carat + four .01 carat diamonds or cz's, total carat wt = .18
--	--	--	--	---

Signature	Windswept
	
3	2
X	X
X	X
X	X
X	X
X	X
X	X
X	
X	X
X	X
NA	NA
NA	NA
NA	NA
NA	NA
NA	NA
degree letters or grad year	degree letters or grad year
degree letters or grad year	degree letters or grad year
X	X
X	NA
X	X
NA	NA
alpha/numeric and Greek available	alpha/numeric and Greek available

two .03 carat diamonds or cz's, total carat wt = .06	two .01 carat + two .02 carat + two .03 carat diamonds or cz's, total carat wt = .12
---	---

# VCU Regalia Collection

3.2017

**Custom VCU Regalia: Greenweaver Fabric made from recycled plastic bottles, embroidered**

Bachelor (includes hood and mortarboard)

Master (includes hood and mortarboard)



**Professional Regalia (includes hood and mortarboard): Greenweaver Fabric made from recycled plastic bottles, embroidered**

Physical Therapy

Teal

Pharmacy

Olive





**ed VCU seal, and embroidered piping on Master gown.**

---

Doctor (includes mortarboard and hood, tam optional)



**recycled plastic bottles.**

---

MD  
Green

Dentistry  
Lilac



---

Nursing/Nurse Anesthesia  
Bright Gold





# VCU



Request For Proposal 7629420BA  
Virginia Commonwealth University  
Graduation Products - Academic Regalia,  
Class Rings and Announcements

**balfour**®



7211 Circle S Road | Austin, TX 78745  
balfour.com

July 25, 2017

Virginia Commonwealth University  
RFP #7629420BA  
Attention: Brandon C. Augustine  
912 W. Grace Street, 5th Floor  
Richmond, VA 23284-0327

Dear Committee Members:

Thank you for many great years of partnership with VCU. As we all look to the future, we are honored to be included in this RFP process! RFP responses can be fairly complicated documents so we thank you for your hard work and careful analysis as you navigate this process.

Balfour can be summarized with one simple statement: We are a sophisticated logistics and customer service company that sells graduation products. We excel at getting the right ring or gown - to the right student or faculty - at the right time. That's an important distinction because we believe it enables us to deliver a superior set of benefits to your institution and your students.

Allow us to summarize why we are confident that Balfour remains the right choice for VCU:

- **Depth of Experience** – The Balfour Group has more than 100 years of success in each and every category detailed in the RFP. Class Rings are our core business where we continue to thrive with innovation and growth. Official university regalia is our fastest growing category and a key strategic growth opportunity. Graduation Announcements continue to be a steady product offering category. This experience translates into reliability for VCU.
- **Leveraging the Benefits of Technology** – Balfour leads the graduation category in technology investment that enables us to simply out-deliver our competition. For Rings and Regalia we offer state-of-the-art online product experiences for your students that will make their graduation preparations smooth and simple. For VCU administrators our online tools offer a unique level of visibility and control as commencement day approaches.
- **Better Value to Your Students and to Your Institution** – As a multi-category supplier we are able to leverage that scale to financially benefit your students and provide superior profit opportunities for VCU. That scale combined with a technology-driven approach to service has allowed us to deliver a product faster, more accurately and for less cost - which we pass on to you.

Specifically, for VCU students Balfour delivers greater value as follows:

- + Holding Regalia retail at \$55.98 for Cap, Gown, Tassel and Hood by absorbing the license fee and leveraging efficiencies
- + Holding Ring prices at existing low retails

- + Holding Graduation Announcements at existing low retails
- + Creating a student ambassador program that will add further depth to the marketing effort by capitalizing on peer to peer marketing
- + Balfour financed trip to our Austin, Texas headquarters for key students and administrators to tour our facility and strategize deeper student involvement regarding the ring program and graduation day

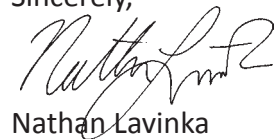
For VCU it's important to summarize existing and new elements:

- Balfour offers a new 10% end-of-year rebate applicable to all three categories. We are able to do so because leveraging our business over these three important categories allows us greater efficiencies to pass on to VCU.
- Balfour offers an increased Minimum Annual Royalty Guarantee of \$75,000 applicable to Rings and Announcements in year one and increasing by 5% per year for the term of the agreement.
- Balfour is proud to be a part of our Partner University's ceremonies. To enhance the ceremony Balfour will provide the VCU trustees with custom designed VCU regalia rentals for the duration of this contract. We anticipate the value of this program to be in excess of \$3,000 annually.
- In partnership with the university, Balfour continues to strongly support the growth of the Ring tradition and ceremony by leveraging our Official Ring experience at hundreds of other universities. We bring that experience and creativity to VCU. Our increased marketing commitment is more than \$30,000.

Supported by a Balfour workforce of some 1200 employees, your local service team will be the point people to carry out the above initiatives. Nathan Lavinka and Mike Foltz lead a team of 16 Balfour employees in the state of Virginia that will be on campus as often as needed to get the job done to your 100% satisfaction.

Again, thank you for five productive years of partnership. We look forward to a new era of growth and mutually beneficial partnership with your great university. We ask your support in this RFP process and thank you for your kind attention to these important decisions facing your committee.

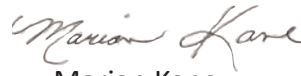
Sincerely,



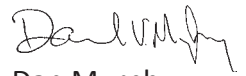
Nathan Lavinka  
Regional Director of  
Market Development



Mike Foltz  
Regional Manager




Marian Kane  
Territory Associate



Dan Murphy  
Regional  
Vice President



Curt Langford  
Vice President, College  
Market Development



Chris Barr  
Vice President  
Graduation Products



Kim Rosenmeier  
Marketing Manager  
Rings & Paper



Aaron Fox  
Marketing Manager  
Regalia



# **TABLE OF CONTENTS**

## Section I

Original Request for Proposal 7629420BA .....	5 - 37
---	--------

## Section II

Balfour's Response to Proposal 7629420BA .....	38 - 114
--	----------

## Section III

Required Signature Forms .....	115 - 124
--------------------------------	-----------

## Section IV

Pricing Templates .....	125 - 135
-------------------------	-----------

## Section V

Sales and Service Support .....	136 - 139
---------------------------------	-----------

## Section VI

References .....	140 - 143
------------------	-----------

## Section VII

Marketing Collateral .....	144 - 151
----------------------------	-----------



# VCU



## SECTION I

Original Request For Proposal 7629420BA  
Virginia Commonwealth University  
Graduation Products - Academic Regalia,  
Class Rings and Announcements

**balfour**<sup>®</sup>



# Request for Proposals

RFP #: 7629420BA

RFP Title #: Graduation Products

Issuing Agency: Virginia Commonwealth University

Issue Date: 06/29/2017

Closing Date: 07/25/2017 @ 2:00 PM



A VASCUPP Member Institution

## Request for Proposals RFP #7629420BA

**Issue Date:** 06/29/2017

**Title:** Graduation Products

**Send All Proposals To:** Virginia Commonwealth University  
RFP #7629420BA  
Attention: Brandon C. Augustine  
912 W Grace St, 5th floor  
Richmond, Virginia 23284-0327

**Proposals Shall Be Received Until:** 07/25/2017 @ 2:00 PM

**Direct ALL inquiries concerning this RFP to:** Brandon C. Augustine, Category Manager  
baugustine@vcu.edu

**Questions concerning this RFP must be received via email no later than:** 07/12/2017 @ 4:00PM

This Request for Proposals & any Addenda are posted on the eVa website at: <http://www.eva.virginia.gov>

HARD-COPY, ORIGINAL PROPOSALS MUST BE RECEIVED IN VIRGINIA COMMONWEALTH UNIVERSITY'S DEPARTMENT OF PROCUREMENT SERVICES ON OR BEFORE THE DATE AND TIME DESIGNATED ON THIS SOLICITATION. ELECTRONIC SUBMISSIONS AND FACSIMILE SUBMISSIONS WILL NOT BE ACCEPTED IN LIEU OF THE HARD-COPY, ORIGINAL PROPOSAL. VENDORS ARE RESPONSIBLE FOR THE DELIVERY OF THEIR PROPOSAL. PROPOSALS RECEIVED AFTER THE OFFICIAL DATE AND TIME WILL BE REJECTED. THE OFFICIAL DATE AND TIME USED IN RECEIPT OF RESPONSES IS THAT TIME ON THE CLOCK OR AUTOMATIC TIME STAMP IN THE DEPARTMENT OF PROCUREMENT SERVICES.

**IF PROPOSALS ARE HAND DELIVERED OR SENT BY FEDEX, UPS, OR ANY OTHER PRIVATE COURIER, DELIVER TO THE ADDRESS NOTED ABOVE: VIRGINIA COMMONWEALTH UNIVERSITY, RFP #7629420BA, ATTENTION: Brandon C. Augustine, 912 W. GRACE ST., 5TH FLOOR, RICHMOND, VA 23284-0327. IF USING US MAIL (NOT RECOMMENDED): IF PROPOSALS ARE MAILED VIA US MAIL, MAIL TO VIRGINIA COMMONWEALTH UNIVERSITY, RFP#7629420BA, ATTN: Brandon C. Augustine, BOX 980327, RICHMOND, VA 23298-0327. THE RFP NUMBER, DATE AND TIME OF PROPOSAL SUBMISSION DEADLINE, AS REFLECTED ABOVE, MUST CLEARLY APPEAR ON THE FACE OF THE RETURNED PROPOSAL PACKAGE.**

In Compliance With This Request for Proposals And To All Conditions Imposed Therein and Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services Described Herein In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation. Furthermore, The Undersigned Agrees Not To Start Any Work Relative To This Particular Solicitation Until A Resulting Formal Signed Purchase Order Is Received By The Contractor From University's Department of Procurement Services. Any Work Relative To This Request for Proposals Performed By The Contractor Prior To Receiving A Formal Signed Purchase Order Shall Be At The Contractor's Own Risk And Shall Not Be Subject To Reimbursement By The University.

**Signature below constitutes acknowledgement of all information contained through links referenced herein.**

**NAME AND ADDRESS OF COMPANY:**

_____	Date: _____
_____	By (Signature In Ink): _____
_____ Zip Code _____	Name Typed: _____
E-Mail Address: _____	Title: _____
Telephone: ( ____ ) _____	Fax Number: ( ____ ) _____
<b>Toll free, if available</b>	<b>Toll free, if available</b>
DUNS NO.: _____	FEI/FIN NO.: _____
REGISTERED WITH eVA: ( ) YES ( ) NO	SMALL BUSINESS: ( ) YES ( ) NO
VIRGINIA DSBSD CERTIFIED: ( ) YES ( ) NO	MINORITY-OWNED: ( ) YES ( ) NO
DSBSD CERTIFICATION #: _____	WOMEN-OWNED: ( ) YES ( ) NO

**A Pre-Proposal conference will not be held.**

REQUEST FOR PROPOSALS RFP# 7629420BA

Page 2 of 22

## TABLE OF CONTENTS

### PAGE

I.	<u>PURPOSE</u>	4
II.	<u>BACKGROUND</u>	4
III.	<u>GOVERNING RULES</u>	5
IV.	<u>OPTIONAL USE CONTRACT</u>	5
V.	<u>THE UNIVERSITY</u>	5
VI.	<u>STATEMENT OF NEEDS</u>	5
VII.	<u>PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS</u>	14
VIII.	<u>PRICING SCHEDULE</u>	16
IX.	<u>SWAM COMMITMENT AND REPORTING REQUIREMENTS</u>	16
X.	<u>EVALUATION AND AWARD CRITERIA</u>	17
XI.	<u>GENERAL TERMS AND CONDITONS</u>	17
XII.	<u>SPECIAL TERMS AND CONDITONS</u>	17
XIII.	<u>CONTRACT ADMINISTRATION</u>	21
XIV.	<u>ATTACHMENTS</u>	22

## I. **PURPOSE:**

The intent and purpose of this Request for Proposals (RFP) is to seek proposals for qualified source for Graduation Products – Academic Regalia, Class Jewelry and Announcements for Virginia Commonwealth University.

The initial contract term shall begin January 15, 2018 for approximately five (5) and one-half (1/2) year(s) with the initial term ending on June 30, 2023, with the option of up to one (1), five (5) renewal, to be executed upon mutual signed agreement of both parties. It is the intent of this solicitation and resulting contract(s) to allow for cooperative procurement, at the contractor's discretion. Accordingly, any public body, public or private health or educational institution or lead-issuing institution's affiliated foundations may access any resulting contract(s) if authorized by the contractor.

Participation in this cooperative procurement is strictly voluntary. If authorized by the Contractor(s), the resultant contract(s) may be extended to the entities indicated above to purchase at contract prices in accordance with contract terms. Upon request, the Contractor shall notify the lead-issuing institution in writing of any entities accessing the contract. No modification of this contract or execution of a separate contract is required to participate. The Contractor shall provide usage reports for all entities accessing the Contract upon request. Participating entities shall place their own orders directly with the Contractor(s) and shall fully and independently administer their use of the contract(s) to include contractual disputes, invoicing and payments without direct administration from the lead-issuing institution. The lead-issuing institution 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 lead-issuing institution is not responsible for the acts or omissions of any entity, and will not be considered in default of the Agreement no matter the circumstances.

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

Additional information on cooperative procurement is available at:

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Cooperative\\_Procurement.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Cooperative_Procurement.pdf)

## II. **BACKGROUND:**

Approximate units for 2016:

### A. Class Jewelry

- |                           |                                |
|---------------------------|--------------------------------|
| • Ring Sale               | 343                            |
| • Total Approximate Value | \$Pending Response from Nathan |

### B. Academic Regalia

- |   |       |
|---|-------|
| • Approximate Unit Sales 1/2016 - 9/2016            | 4,467 |
| • Approximate Unit Sales 9/2016 - 12/2016           | 1,740 |
| • Total Approx. Unit Sales Between 1/2016 - 12/2016 | 6,207 |

### C. Announcements

- |                                 |                               |
|---------------------------------|-------------------------------|
| • Personalized                  | 940 sets (24 average per set) |
| • Standard                      | 1,525                         |
| • Total Approximate Sales Value | \$44,600                      |

### **III. GOVERNING RULES:**

This solicitation is issued in accordance with the provisions of:

- A. Purchasing Manual for Institutions of Higher Education and their Vendors (<https://vascupp.org/hem.pdf>)
- B. Rules Governing Procurement of Goods, Services, Insurance, and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia (<https://vascupp.org/rules.pdf>)

### **IV. OPTIONAL USE CONTRACT:**

The resulting contract(s) will be an optional use contract. VCU is in no way required to make purchases from the Contractor and may in its sole discretion purchase the identical and/or similar goods/services from other sources. Any estimates/quantities contained herein do not represent a purchase commitment by VCU.

### **V. THE UNIVERSITY:**

Information is available at:

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_The\\_University.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_The_University.pdf)

### **VI. STATEMENT OF NEEDS:**

This Section describes VCU's requested goods and/or services and the areas to be addressed in Offeror's Proposal. Proposal response must be written in the same order as outlined below. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities. Emphasis should be placed on completeness and clarity of content. Failure to submit all information requested may result in the elimination of the Proposal from consideration. Proposals that are substantially incomplete or lack key information may be rejected by VCU. Please note that utilization of the words "shall" or "must" indicates a mandatory requirement.

#### **A. Description of Requested Goods/Services and Proposal Response Requirements:**

##### **1. Overview:**

- a) The Contractor shall provide written statement acknowledging and agreeing to all mandatory requirement statements included in this Request for Proposal's Section VI. Statement of Needs for all statements that include the utilization of the words "shall" or "must". Absence of the required written acknowledgement and agreement statement in the proposal response may result in disqualification of your proposal response.
- b) Provide a brief history of the firm. Describe the firm's experience in providing graduation products and services to universities of comparable sizes with programs that are similar in complexity. Specify your firm's plan to meet the graduation and recognition product needs of Virginia Commonwealth University.
- c) The awarded Contractor shall provide a letter of intent to implement or not implement the second 5-year option to renew the agreement for the period July 1, 2023 to June 30, 2028 by no later than July 1, 2022.

##### **2. Class Jewelry:**

- a) The Contractor shall continue the University's program for the sale of class rings. See Appendix IV (Ring Specifications). This approved collection is known as the "Official" collection of rings for Virginia Commonwealth University.



**Describe the class ring program proposed for Virginia Commonwealth University.**

- b) The Contractor may offer additional class rings or jewelry for University consideration. The University, at its sole discretion, may opt to incorporate additional rings into the official collection in the future.

**Describe the collection of rings/jewelry that will be offered. State how the selection and the program will help enhance the customer's affinity with the University.**

- c) The Contractor should provide services typically associated with the sale of class rings and jewelry. These services should include design, production, sales, marketing and warranty.

**Describe your firm's design services, production techniques and quality control methods. Discuss the sales support services available for customers including the following:**

- (a) **Minimum deposit requirements**
- (b) **Methods of deposit payment**
- (c) **Accepted forms of credit**
- (d) **Finance programs**

**State the firm's warranty policy including the following:**

- (a) **Length and conditions of guarantee regarding defects in materials and workmanship**
  - (b) **Length and conditions of guarantee regarding stones and stone decorations.**
  - (c) **Provide conditions and associated charges for ring sizing and adjustments; for replacement of damaged rings; for restoring ring finish; and for changes in academic designation and graduation year.**
  - (d) **State the refund policy for students who fail to graduate in the year designated on the ring and the process for resolving disputes.**
- d) The Contractor should provide for the University's need to design additional rings and jewelry as necessary and work with the assigned committee as appropriate. The ring/jewelry styles may be re-designed as necessary to include new VCU marks and elements.

**Describe the contractor's capability to accommodate the University's need to design additional rings and jewelry when necessary.**

- e) Virginia Commonwealth University shall approve all designs, artwork, and mock-up rings and jewelry items prior to production. The jewelry selection will be featured as the "Official" collection to qualified students.
- f) The Contractor will have exclusive trademark rights for the sale of class jewelry to students. However, VCU Alumni (to include the MCV Alumni Association of VCU) may market class jewelry (exempting rings) bearing VCU's marks and logos to alumni under a separate agreement.

**Acknowledge and agree.**

- g) The title to dies and molds used in the manufacture of VCU class rings/jewelry shall be vested in the University. The Contractor shall retain all dies and molds and maintain such dies and molds in first class condition. In the event the Contractor determines that dies or molds are to be destroyed or otherwise disposed, the Contractor shall deliver dies and molds to Virginia Commonwealth University.
- h) Price changes for jewelry shall be allowed annually on June 15th of each year based upon the London PM fix for that date: <https://www.theice.com/marketdata/reports/178>

- i) The following formula shall be used to determine the change in price due to changes in the market price of gold:
- j)  $(\text{Change in gold market}) \times (\text{Gold Factor}) \times (\text{Ring Pennyweight (dwt)}) = \text{Price rounded to the nearest \$5 increment}$
- k) New ring retail prices shall take effect on July 1st of each year during the initial term or any renewal period.

**Describe the alloy metal content (with percentages of each metal) of your Silver rings.**

- l) Complete Pricing Schedule (Appendix III – tabs for Gold Rings & Silver, etc. Rings). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.
- m) In addition to your price submission, **list upcharges for all potential features that could be added to the base price of the ring.** Features might include full name engraving, stones, stone cuts, stone seal, panel tops, and special finishes.
- n) The Contractor should support jewelry sales by providing sales support materials.

**Describe the sales support and point of presentation material that will be provided at no charge including:**

- (a) **Point of presentation display cases**
- (b) **Ring samples**
- (c) **Website access to sale and support information**
- (d) **Toll-free phone numbers for service**
- (e) **Copy of the warranty and a care manual**
- (f) **Meeting regularly with representatives from VCU Alumni and Business Services to evaluate the program and make changes as needed**
- o) The Contractor shall provide a digital 3d model of any official class ring per the University's request.
- p) The Contractor should conduct a minimum of six (6) ring sales (three per semester) each contract year, to include at least two sales on the MCV Campus. Sales events on the Monroe Park Campus should include evening hours.

**State the minimum frequency, location and duration of on-campus ring sale events.**

- q) The Contractor should have a well-developed marketing plan for class rings and jewelry.
- r) The Contractor should sell class jewelry on campus in-person and as well as on the Internet.
- s) The Contractor may use locations in the University retail stores to support campus sales.

**Provide a marketing plan for class rings and jewelry.**

- (a) **Specify key events and approximate dates.**
- (b) **Describe the dollars and/or percentage off ring sales promotion including the amount off and the number of times the promotion will be offered.**
- (c) **Provide samples of the customized marketing media that will be used.**
- (d) **Describe the direct mail program.**
- (e) **Describe other marketing processes that will be used. State how the medium will be beneficial and approximately the frequency of use.**
- (f) **Provide a sample website or URL showing the proposed VCU website.**

**(g) Describe how the website will be used to market class rings, regalia and other products.**

- t) The contractor shall request written approval for all marketing materials from the VCU Business Services Marketing Manager or delegate at least two weeks in advance of the production of any marketing materials, and shall not produce any marketing materials without receiving approval.
- u) The Contractor shall provide an accounting of all VCU jewelry sales through all venues annually. (See Section "VI. 7. Reporting")
- v) The Contractor shall offer a dollar discount on class rings to the VCU Alumni Association.

**Provide the dollar discount will your offer VCU Alumni on class rings.**

- w) The Contractor shall provide information on the ring ordering process to the bookstore and meet with the bookstore annually to discuss. The contractor shall provide clear messaging to students advising them where they can find additional information about the ring program.

**3. Academic Regalia:**

- a) The Contractor should propose a program for the solicitation and distribution of quality regalia for students to be sold through the VCU Bookstore.
  - (a) The Contractor should offer quality garments to be retained by the students (see Appendix V for the VCU collection).
  - (b) Regalia shall adhere to standards established by the American Council on Education.
  - (c) The regalia bundle should include a cap, gown, hood, and tassel for all degree levels.
  - (d) All hoods shall show the appropriate degree color.
  - (e) Tassels for graduates on the MCV Campus should show the appropriate degree color.
  - (f) Doctoral gowns for students receiving a PhD, MD, DDS, Pharm D and other designated doctoral degrees shall show the appropriate degree velvet color.
  - (g) The Contractor should solicit the necessary fitting and degree information from students.
  - (h) At a minimum, the Contractor should support the bookstore in distributing student regalia on each campus during a mid-semester multipurpose graduation event ("Grad Fair").
  - (i) The Contractor should supply extra apparel for last-minute orders and adjustments the day of Commencement.
  - (j) The Contractor shall provide students the option of ordering regalia over the Internet.
  - (k) The Contractor shall provide illustrated wearing instructions with the apparel.
  - (l) All regalia sold through the Contractor's ecommerce solution shall be equal to the price offered through the VCU Bookstore.
  - (m) The Contractor should provide two 6' lightweight retractable signs for use at commencement to instruct students on how to properly wear regalia. Signage will be developed in conjunction with VCU Business Services but will be funded by contractor. These signs will be replaced as needed due to wear and tear or any change in regalia standards

**Describe the proposed student keeper regalia program.**

- (n) Provide sample apparel and manufacturing specifications for Medicine - M.D., Nursing - M.S, and Business Administration- B.S. from Virginia Commonwealth University. Include

cap, gown, hood and tassel.

- (o) Outline the program for soliciting fitting and degree information from students for the May and December Commencements.
  - (p) Describe how students will be notified about the fitting sessions and how size and degree information will be collected.
  - (q) Provide approximate key dates for both the May and December events.
  - (r) Describe the distribution program on each campus including approximate dates.
  - (s) Explain how the firm will ensure the appropriate amount of apparel is on-hand to meet the needs of all students.
  - (t) Describe your ecommerce solution for student regalia purchasing.
  - (u) Provide a sample of illustrated instructional information provided to customers about wearing the regalia.
  - (v) Confirm that contractor will fully fund and contribute to the design of two pop-up informational signs for use during commencement to assist students with the proper wearing of regalia.
  - (w) Complete Pricing Schedule (Appendix III – Regalia – Announcements tab). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.
- b) The Contractor should provide the University with a program for the solicitation, distribution and collection of high quality rental regalia for faculty, staff and others upon request, to be sold through the VCU Bookstore.
- (a) The Contractor should offer quality rental garments for faculty.
  - (b) All hoods shall show the appropriate degree color.
  - (c) The Contractor should support the University retail stores in soliciting the necessary fitting and degree information from faculty.
  - (d) Each rental order should be custom packed showing the customer's name.
  - (e) The Contractor shall supply extra apparel for last-minute orders and adjustments the day of Commencement.
  - (f) The Contractor should provide the option of ordering faculty and staff regalia using the Internet.
  - (g) The bookstore shall not be required to pay for rental apparel that was not used.
  - (h) The Contractor should provide wearing instructions with the apparel.
  - (i) The Contractor shall provide rental regalia for the Platform Party, not to exceed an average of 25 per semester over the length of the contract. The average of individuals included in this grouping for the previous two years has been 14. These items shall be pressed, placed in individual garment bags, and clearly labelled with the name of the individual, contents of the bag, and initials of the manager who verified the contents. This regalia will be delivered in person by a manager and checked in with the VCU Bookstore's General Merchandise Manager or other individual specified by the University. Names, heights, degrees, disciplines and institutions will be provided by the VCU Bookstore.
  - (j) The contractor shall provide up to six complimentary "extra" sets of rental regalia and tams each semester, at the request of the VCU Bookstore, to be on hand in the event of last-minute changes or issues with Platform Party regalia (this includes members of the VCU Board of Visitors who have keeper regalia).

**Describe the proposed faculty rental regalia program.**

- (a) Provide sample apparel for a PhD from Virginia Commonwealth University. Include cap, gown, hood and tassel.
  - (b) Outline the program for soliciting fitting, school and degree information for the May and December commencements.
  - (c) Provide approximate cut-off dates for faculty and staff rental for the May and December ceremony.
  - (d) Describe how each rental order will be packed for distribution.
  - (e) Describe the distribution program on each campus including key delivery dates and how individual orders will be shipped.
  - (f) Explain how the firm will ensure the appropriate amount of apparel is on-hand to meet the needs of faculty and staff, including how last-minute requests will be satisfied.
  - (g) Describe how the Internet will be used for faculty and staff ordering.
  - (h) Confirm that the firm will provide additional verifications of all VIP regalia orders for commencement, to include pre-shipping and post-receipt on-site review of orders at the University's sole discretion.
- c) The University and the retail stores shall not be responsible for uncollected apparel.
  - d) The Contractor shall offer commemorative sashes for student marshals.

**Provide a sample of the proposed approach and discuss any available options. State the price per unit for your proposal.**

- e) The Contractor should offer high quality custom apparel for purchase by customers.

**Provide a sample of your most popular custom-tailored PhD cap, gown, hood and tassel. Provide a plan to market custom regalia to the faculty and include a brochure and pricelist for custom apparel.**

- f) The Contractor should promote and market the regalia program.

**Acknowledge and agree.**

- g) Complete Pricing Schedule (attached Excel document). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.
  - h) The University reserves the right to request modification to regalia specifications.
  - i) VCU marks and logos are registered with government agencies and currently licensed through the Collegiate Licensing Company (CLC). Regalia prices shall include all applicable licensing fees. The current CLC licensing rate is 12% per unit and may change periodically. Contractor will receive notice from CLC of any licensing fee changes. The University reserves the right to change Licensing Vendors and will provide notice of said change at its earliest convenience. The contractor shall comply with any Licensing vendor change requirements and University Trademarks and Licensing Policies.
4. Announcements and Stationery:
- a) The Contractor should provide a comprehensive program of standard and personalized graduation announcements and the accompanying stationery including thank you cards, name cards, etc. The Contractor should offer announcements for both the May and December Commencement ceremonies.

**Describe the graduation announcement and stationery program proposed.**

- (a) Provide samples of standard announcements and of personal announcements. Include

accompanying stationery as appropriate.

- (b) Provide information about the design options and paper stock.
- (c) Specify the return-for-credit option for the return of unsold standard announcements sold through the bookstores.
- (d) Provide key order-by and ship-by dates for announcements.
- (e) Outline the program for soliciting announcement orders for the May and December commencements.
- (f) Describe the firm's ability to include information regarding a diploma ceremony with any marketing material mailed to candidates. Provide additional costs, if any.
- b) A designated University representative shall pre-approve all copy prior to printing the announcement for each Commencement.
- c) The Contractor shall provide VCU with the option of making modifications to the design of the announcements as needed.
- d) The Contractor shall provide the option of ordering personalized announcements using an ecommerce solution.

**Describe the announcement and stationery ordering options available on the Internet.**

- e) The Contractor should promote and market the announcement program.

**Describe how the announcements will be marketed. Include how the Internet will be used for marketing and ordering announcements.**

**Complete Pricing Schedule (attached Excel document, tab: Announcements). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.**

5. Recognition Gifts:

- a) The Contractor should provide appropriate gifts for sale recognizing and commemorating the graduation event. The mementos might include date tassels, stoles, etc.

**Describe the graduation gifts and accessories program proposed. State how the products will be marketed.**

6. Marketing:

- a) The Contractor should develop a marketing plan each year. Marketing materials should be customized for VCU. The Contract should provide a website to support VCU graduation products.

**Describe or summarize the firm's overall marketing strategy.**

- (a) Provide a sample marketing plan for products and services.
- (b) Describe the strategies used to nurture a sense of tradition and to build a feeling of pride and exclusivity for individuals using with the VCU products.
- (c) Provide a sample of the custom marketing materials that will be used at VCU.
- (d) Describe the mailing campaign. State the number, timing and target audience of the mailings.
- (e) Describe customer incentive programs.
- (f) Describe how the internet, e-mail, social media will be used to market products.
- (g) Acknowledged the firm is willing to accept all costs associated with marketing the

products and services offered.

- b) The Contractor should market products through the VCU Bookstores. The stores may add a markup, approved by the University, on products sold through the stores. The University stores will support the ring and regalia order and delivery process.

**Acknowledge and agree.**

- c) All mailing lists/files or other media containing personal information about students, alumni, faculty and staff shall be considered protected data and are intended for use as directed in this RFP. Any other use of this protected data is strictly prohibited without written permission of Virginia Commonwealth University.
  - d) The Contractor shall, at minimum, meet with the bookstore prior to every graduation, in person or virtually, to discuss graduation logistics. In addition, the Contractor shall attend a Grad Fair preparation meeting, in person or virtually, with the bookstore, alumni, and other partners.
7. Reporting:
- a) The Contractor shall provide an accounting summary reports detailing unit sales through all venues. At a minimum the reports shall include the following (to be finalized upon award of contract):
    - (a) Class ring sales by campus, to include but not be limited to ring style, metal, purity, sales price, quantity, source (online, in-person, etc.), customer type (alumni, student by year, etc.).
    - (b) Personalized announcement sales by campus;
    - (c) Regalia sales by campus, and
    - (d) Standard announcement sales by campus.
  - b) Contractor should formally meet with representatives from the University at least annually to evaluate services and to review accounting reports. The "Annual Program Review" will consider the status of the current program and recommend action plans as appropriate. Topics may include issues related to sales trends, unit sales summary reports, marketing and evaluation results.
  - c) For this contract, Contractor's fiscal reporting period shall comply with the University's Fiscal Year which is July 1 through June 30. All monthly reporting shall consist of data for the complete period, from the first day of the calendar month through the last day of the calendar month.
  - d) The Contractor shall e-mail a monthly report in a spreadsheet format to the University. The monthly reports shall be submitted by the 10th of each month following the reporting period.
  - e) Should the report due date fall on a weekend or holiday, reports and/or payments are due on the next business day.
  - f) On the monthly statement, Contractor should explain discrepancies with a deviation of 3% from prior year's financial accomplishments.
  - g) Reports required from the Contractor shall be submitted on time. A three-day grace period will be given up to two times each year. In the event a report is submitted more than three days past the required deadline or is submitted late more than two times per Fiscal Year, without reasonable cause, the University may impose a \$1,000 penalty.
  - h) The Contractor's Accounting Liaison should meet with the University upon request to review any operating statements or reports to identify issues and to develop an action plan



for resolution. Any operating statements requiring adjustments because of a review audit shall be identified and reflected on the next reporting month.

**The University should be informed by the Contractor of the schedule of the Contractor's audit of the records and operations at the University. The University shall have the option to participate in the Contractor's audits and shall receive a full audit report of findings regardless of the University participation.**

- i) The Contractor should submit all reports and payments to:  
VCU Retail Services – Accounting Department  
Virginia Commonwealth University  
Box 980208  
Richmond, VA 23298-0208
- j) Electronic reporting and payment submission addresses will be determined upon contract award.

**Acknowledge and accept the Section 7 – Reporting, all statements (a-k).**

8. Financial:

- a) All pricing shall include University royalty payments and licensing fees where appropriate.
- b) The Contractor shall propose a royalty on the gross total items sold and minimum annual royalty guarantee. An amount equal to 1/12th of the minimum annual royalty payment is due monthly by the 10th of each month. **Complete Pricing Schedule (Appendix III – MAG tab).**
  - (a) All net sales (gross sales minus taxes), including but not limited to cash, check, internal transfers, gift card redemption and debit/credit card, shall be recorded as revenues on financial reports at retail values.
  - (b) Royalties shall be computed on net sales.
  - (c) Royalties shall be paid to the University in the period they were earned and charged, and not upon collection date. The Contractor shall not be reimbursed for royalties paid on uncollected accounts.
  - (d) Uncollectable funds shall be the responsibility of the Contractor.
  - (e) Contractor should provide the University a Minimum Annual Royalty Guarantee for each contract year, based on the University's Fiscal Year, for a period of five (5) years per response submitted in the Proposed Price spreadsheet, as negotiated, which will become document of record for contractual purposes.
  - (f) After the initial fixed Minimum Annual Royalty Guarantee agreement term, the final initially agreed upon contract year Minimum Annual Royalty Guarantee will increase by 5% per year thereafter.
  - (g) Contractor should pay the Minimum Annual Royalty Guarantee amount in equal monthly installments by the 10<sup>th</sup> of each calendar month based upon the University's Fiscal Year. Should the payment due date fall on a weekend or holiday, payments are due on the next business day.
  - (h) Contractor shall monitor sales and calculate royalties payable to the University for each University Fiscal Year. If, and to the extent, that royalties due the University exceed the Minimum Annual Guarantee, the Contractor should pay the excess amount by August 10.
  - (i) Minimum Annual Royalty Guarantee shall be computed on total net sales of contract. (Please complete Appendix III, MAG tab)
- c) The Contractor shall pay the licensing fee on all emblematic merchandise.

**Acknowledge and agree.**

9. Transition:

- a) The Contract should provide a seamless transition to the new agreement.

**As necessary, describe how your firm will implement the new agreement. Provide estimated dates for key tasks.**

- b) The Contractor shall be prepared to provide regalia for the May 2018 Commencement.
- c) The Contractor shall be prepared to offer the "Official" VCU class ring(s) during the Spring 2018.

10. Experience and Qualifications of Firm:

- a) Firm should provide:

- (a) List of three references for whom similar services were provided, preferably of public institutions of higher education or a similar sized organization.
- (b) Provide a list of institutions of higher education with which the firm has a signed term contract.
- (c) Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of VASCUPP Members can be found at <http://www.vcu.edu/procurement/purchasing/contracts/aboutvascupp.html>.

11. Other related goods/services:

**Describe other related goods and/or services provided by your firm. Provide information to demonstrate how these goods and/or services could benefit the institution and include the associated pricing for the term of the contract. Provide information to address how newly introduced products and services would be offered and included in the contract. Include information on your ability to provide most favored nations pricing.**

12. Marketing:

- a) VCU marks and logos are registered with government agencies and currently licensed through the Collegiate Licensing Company (CLC). All merchandise prices shall include all applicable licensing fees. The current CLC licensing rate is 12% per unit and may change periodically. Contractor will receive notice from CLC of any licensing fee changes. The University reserves the right to change Licensing Vendors and will provide notice of said change at its earliest convenience. The Contractor shall comply with any Licensing vendor change requirements and University Trademarks and Licensing Policies.
- b) All marketing or use of licensed materials of any type must be approved in writing by the Business Services Marketing Manager.

**VII. PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS:**

A. Instructions are as follows:

- 1. In order to be considered for award, proposal submissions must contain, at minimum, the following:
  - a) Company Qualifications and Experience.
  - b) Responses to all requirements listed in the Statement of Needs above.
  - c) A list of three (3) references for whom similar services were provided, preferably institutions of higher education, or similarly-sized organizations.
  - d) Pricing Schedule as required in Section VIII.

- e) SWaM documentation as required in Section XI.
2. Complete and return page 2 of the RFP. Proposals shall be signed by an authorized representative of the Offeror. By submitting a Proposal, Offerors certify that all information provided in response to the Request for Proposals is true and accurate. Failure to provide information required by this Request for Proposals will ultimately result in rejection of the Proposal.
  3. Complete and return signed addenda acknowledgments (if applicable).
  4. Submit **ten (10) original hard copy (paper) document** of the entire Proposal, including all attachments and all proprietary information (see #7 below). Submit one (1) unsecured, electronic copy (on a disc or flash drive) of the entire Proposal including all attachments and EXCLUDING ANY PROPRIETARY INFORMATION. This disc or flash drive must be clearly marked on the outside that it **excludes** proprietary information.
  5. Submit an unsecured electronic copy (on a disc or flash drive) of the entire Proposal, including all attachments and proprietary information.
  6. All information requested must be submitted. Failure to submit all information requested may result in the University requiring prompt submission 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 University, at the University's sole discretion.
  7. If applicable, the outside of the Proposal must be marked to clearly denote proprietary information is contained in the documents. **Written notice of proprietary information must be submitted as the first page of the Offeror's Proposal.** Notice must specifically identify the applicable portions of the Offeror's Proposal that contain data or materials to be protected and shall state the reasons why protection is necessary. In addition, the specific (i.e. specific words, figures or paragraphs) proprietary or trade secret material submitted, must be identified on the applicable page(s) within the Offeror's Proposal, by some distinct method, such as highlighting, underlining, etc. **The classification of an entire Proposal document, line item prices and/or total Proposal prices as proprietary or trade secrets is not acceptable and may result in rejection and return of the Proposal, at the University's sole discretion.**
  8. Invoicing and Payment: Firm must complete Appendix II which is available at: [http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Appendix\\_2.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Appendix_2.pdf)
  9. Communications regarding this Request for Proposals (RFP) shall be formal from the date of the issuance for this RFP, until either a Contractor has been selected or the University Procurement Services Department rejects all proposals. Formal communications shall be directed to the University Procurement Department only. Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than Procurement Services Department representative may result in the offending Offeror's Proposal being rejected.
  10. Oral Presentation: Offerors who submit a proposal in response to this RFP may be required to conduct an oral presentation of their proposal to VCU. Oral presentations are an option and may or may not be required. Should an oral presentation be required, VCU will designate the date and location for the presentation; the date is critical and alternative dates will not be available. Offerors who are invited to conduct an oral presentation shall include the individual(s) who would be the primary point of contact for VCU, on the Offerors presentation team. VCU reserves the right to rescore proposals following oral presentations.
  11. The version of the solicitation issued by the Virginia Commonwealth University Purchasing Department as amended by any 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 the Virginia Commonwealth University Purchasing

Department 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, Virginia Commonwealth University reserves the right to decide, on a case by case basis, in its sole discretion, whether to reject such a proposal. If the modifications 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 the Purchasing Department.

13. Additional information is available at:

<http://go.vcu.edu/procurement-purchasing>

#### **VIII. PRICING SCHEDULE:**

Offeror shall complete and submit Appendix III.

#### **IX. SMALL, WOMEN-OWNED, AND MINORITY-OWNED BUSINESS COMMITMENT (SWaM):**

It is the policy of the Commonwealth of Virginia that 42% of its purchases be made from small businesses to contribute to the establishment, preservation, and strengthening of small businesses, and businesses owned by women and minorities, and to encourage their participation in VCU 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 or other contractual opportunities.

**Offerors must submit complete Appendix I (see section XIV: Attachments) unless offeror is a DSBSD certified small business. DSBSD certified small businesses must include their certification number on the coversheet of this RFP, but are not required to complete Appendix I.**

**Use of Subcontractors:** If the Offeror intends to use subcontractors to perform any portion of the work described in this RFP, the Offeror must clearly so state. VCU is placing an increased emphasis on its SWaM (Small, Women, and Minority Owned) business program and is interested in identifying any potential opportunities that may be available to engage SWaM vendors to be certified by the Virginia Department of Small Business and Supplier Diversity (DSBSD) through new or existing contracts.

**Identify and list any such opportunities that your firm would commit to if awarded this Contract in Appendix I - Participation in VCU Procurement Transactions Small Businesses and Businesses Owned by Women and Minority.** The Offeror's response must include a description of which portion(s) of the work will be sub-contracted out and the names and addresses of potential Subcontractor(s) under the Contract.

#### **SWaM REPORTING AND DELIVERY REQUIREMENTS:**

Unless the Contractor is a DSBSD certified small business, the Contractor shall submit quarterly reports on the direct involvement of Department of Small Business and Supplier Diversity (DSBSD) certified SWaM Businesses in the performance of the Contract. The report shall specify the actual dollars spent to date with Small Businesses, Women-Owned Businesses, and Minority-Owned Businesses based upon the Contractor's commitment for utilization of DSBSD SWaM Businesses.

The Contractor shall provide this information to:

Virginia Commonwealth University  
Procurement Services Office  
Attn: SWaM Coordinator  
912 W. Grace Street, POB 980327  
Richmond, VA 23284  
Email: [swamreporting@vcu.edu](mailto:swamreporting@vcu.edu)

Failure to submit the required information will be considered a contract compliance issue and will be addressed accordingly. In addition, failure to submit the required information will result in invoices being returned without payment.

## **X. EVALUATION AND AWARD CRITERIA:**

Proposals will be evaluated based upon the information provided in the Offeror's Proposal using the criteria specified below. Negotiations shall be conducted with Offerors so selected. After negotiations have been conducted with each Offeror so selected, the VCU shall select the Offeror which, in its opinion, has made the best offer, and shall award the contract to that Offeror. The University 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 reason why a particular Proposal was not deemed to be the most advantageous (Governing Rules Section 49.D). Should the University determine in writing and in its sole discretion that only one Offeror has made the best proposal, 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 RFP, and the Offeror's response thereto. VCU reserves the right to award to multiple offerors, should such an award benefit the University.

Notice of Award(s) or Notice of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov>.

### **EVALUATION CRITERIA**

- |                                  |     |
|----------------------------------|-----|
| 1. Qualifications and Experience | 30% |
| 2. Methodology/Approach          | 30% |
| 3. Pricing Schedule              | 30% |
| 4. SWaM Status/Utilization*      | 10% |

*\*Offeror's status as a Virginia certified SWaM Business or the Offeror's plans to utilize Virginia DSBSD-certified SWaM Businesses in the Offeror's performance of the contract.*

## **XI. GENERAL TERMS AND CONDITIONS:**

General Terms and Conditions can be viewed at:

<http://procurement.vcu.edu/document-library/business-with-vcu/>

## **XII. SPECIAL TERMS AND CONDITIONS:**

- A. **ADDITIONAL USERS OF CONTRACT:** It is the University's intent to provide other Virginia Association of State College and University Purchasing Professionals (VASCUPP) with access to the University's Agreements and to provide Contractors with opportunities to do business with other VASCUPP institutions of higher education.

To that end and if agreeable with the Contractor, the following Colleges and Universities listed are the VASCUPP institutions and may have access to any agreement resulting from this solicitation: College of William and Mary, University of Virginia, George Mason University, Virginia Military Institute, James Madison University, Old Dominion University, Virginia Polytechnic Institute & State University and Radford University. Upon written request from a VASCUPP institution, the Contractor may allow access to the Contract. Although the University desires to provide access on such contract to VASCUPP, the Contractor is not required to provide such access. A firm's willingness to provide this access to VASCUPP members will not be a consideration in awarding this contract. Although the VASCUPP Agencies may have access to any resulting Agreement, VASCUPP is not bound to use the Agreement and any use of the Agreement is strictly optional.

If the VASCUPP institutions choose to access the Agreement and the Contractor agrees to such access, the terms and conditions of the Agreement will be in full force and effect as between the VASCUPP institutions and the Contractor. VCU will have no responsibility for the resolution of any contractual disputes, or for payment for services rendered which may arise from a VASCUPP institution accessing the Agreement. The Contractor understands and agrees that it shall not have

any recourse against VCU with respect to any claim it may have against another VASCUPP institution that accessed this Agreement.

- B. **ADVERTISING:** In the event a contract is awarded for supplies, equipment, or services resulting from this proposal, no indication of such sales or services to Virginia Commonwealth University will be used in product literature or advertising. The Contractor shall not state in any of the advertising or product literature that the Commonwealth of Virginia or any agency or institution of the Commonwealth has purchased or uses its products or services.
- C. **AUDIT:** The Contractor shall retain all books, records, 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 agency, its authorized agents, and/or State auditors shall have full access to and the right to examine any of said materials during said period.
- D. **AVAILABILITY OF FUNDS:** It is understood and agreed between the parties herein that the agency shall be bound hereunder only to the extent of the funds available or which may hereafter become available for the purpose of this agreement.
- E. **AWARD:** The Commonwealth shall typically engage in individual discussions with two or more Offerors deemed fully qualified, responsible and suitable on the basis of initial responses and with emphasis on professional competence, to provide the required services. Repetitive informal interviews shall be permissible. Such Offerors shall be encouraged to elaborate on their qualifications and performance data or staff expertise pertinent to the proposed project, as well as alternate concepts. At the discussion stage, the public body may discuss nonbinding estimates of total project costs, including, but not limited to, life-cycle costing, and, where appropriate, nonbinding estimates of price for services. Proprietary information from competing Offerors shall not be disclosed to the public or to competitors. At the conclusion of the informal interviews, on the basis of evaluation factors published in the Request for Proposals and all information developed in the selection process to this point, the purchasing agency shall select, in the order of preference, two or more Offerors whose professional qualifications and proposed services are deemed most meritorious. Negotiations shall then be conducted, beginning with the Offeror ranked first. If a contract satisfactory and advantageous to the purchasing agency can be negotiated at a price considered fair and reasonable, the award shall be made to that Offeror. Otherwise, negotiations with the Offeror ranked first shall be formally terminated and negotiations conducted with the Offeror ranked second, and so on, until such a contract can be negotiated at fair and reasonable price. 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 and suitable than the others under consideration, a contract may be negotiated and awarded to that Offeror.

Notice of Award(s) or Notice of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov> for a minimum of 10 days.

- F. **BEST AND FINAL OFFER (BAFO):** At the conclusion of negotiations, the Offeror(s) may be asked to submit in writing, a best and final offer (BAFO). After the BAFO is submitted, no further negotiations shall be conducted with the Offeror(s). The Offeror(s) proposal will be re-evaluated to combine and include the information contained in the BAFO. The decision to award will be based on the final evaluation including the BAFO.
- G. **CANCELLATION OF CONTRACT:** The purchasing agency reserves the right to cancel and terminate any resulting contract, in part or in whole, at any time during the contract including optional renewal periods, without penalty, upon 60 days written notice to the Contractor. 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. The Contractor may provide written notice to the purchasing agency to cancel or terminate any resulting contract effective only at the close of a contract year (June 30) provided a minimum of twelve (12) months written notice is provided to the purchasing agency. 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.



- H. **COMMUNICATIONS:** Communications regarding this Request for Proposals (RFP) shall be formal from the date of issue for this RFP, until either a Contractor has been selected or the University Purchasing Department rejects all proposals. Formal communications shall be directed to the University Purchasing Department.

Informal communications including but not limited to, request for information, comments or speculations, regarding this RFP to any University employee other than a Purchasing Department representative may result in the offending Offeror's proposal being rejected.

- I. **ELECTRONIC COPIES OF PROPOSALS:**

The successful Contractor may be required to provide the VCU Department of Procurement Services with a copy of the Contractor's entire original proposal (to include all attachments), and all subsequent correspondence (i.e. responses to requests for clarification and documents generated through the negotiation process) in an unsecured electronic format (i.e. email, disc – CD or DVD or flash drive). **The Contractor SHALL NOT INCLUDE ANY PREVIOUSLY IDENTIFIED PROPRIETARY INFORMATION IN THE ELECTRONIC FORMAT; VCU will post the Contractor's original proposal, and all subsequent correspondence on the VCU Department of Procurement Services Website, VCU shall not be responsible for the Contractor's failure to exclude proprietary information submitted in the unsecured electronic format).**

- J. **eVA BUSINESS-TO-GOVERNMENT CONTRACTS AND ORDERS:** The solicitation/contract will result in purchase order(s) with the eVA transaction fee specified below assessed for each order.

1. For orders issued July 1, 2011 thru June 30, 2013, the Vendor Transaction Fee is:
  - a) DSBSD-certified Small Businesses: 0.75%, Capped at \$500 per order.
  - b) Businesses that are not DSBSD-certified Small Businesses: 0.75%, Capped at \$1,500 per order.
2. For orders issued July 1, 2013, and after, the Vendor Transaction Fee is:
  - a) DSBSD-certified Small Businesses: 1%, Capped at \$500 per order.
  - b) Businesses that are not DSBSD-certified Small Businesses: 1%, Capped at \$1,500 per order.

The specified vendor transaction fee will be invoiced, by the Commonwealth of Virginia Department of General Services, approximately 30 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.

The eVA Internet electronic procurement solution, website portal [www.eva.virginia.gov](http://www.eva.virginia.gov), streamlines and automates government purchasing activities in the Commonwealth. The portal is the gateway for vendors to conduct business with state agencies and public bodies.

Vendors desiring to provide goods and/or services to the Commonwealth shall participate in the eVA Internet e-procurement solution and agree to comply with the following: If this solicitation is for a term contract, may provide an electronic catalog (price list) or index page catalog for items awarded. The format of this electronic catalog shall conform to the eVA Catalog Interchange Format (CIF) Specification that can be accessed and downloaded from [www.eVA.virginia.gov](http://www.eVA.virginia.gov). Contractors should email Catalog or Index Page information to [eVA-catalog-manager@dgs.virginia.gov](mailto:eVA-catalog-manager@dgs.virginia.gov).

- K. **IDENTIFICATION OF PROPOSAL:** The proposal package should be identified as follows:

From:

Name of Offeror	Due Date	Time
Street or Box Number	RFP No.	
City, State, Zip Code +4	RFP Title	

Name of Contract / Purchase Officer:

The package should be addressed as directed on Page 2 of the solicitation.

If a proposal is not clearly identified, the Offeror takes the risk that the proposal 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.

- L. 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.
- M. 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 disqualified 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 intrauniversity mail system. It is the sole responsibility of the Offeror to insure that its proposal reaches the issuing office by the designated date and hour.
- N. POLICY OF EQUAL EMPLOYMENT: Virginia Commonwealth University is an equal opportunity/affirmative action employer. Women, Minorities, persons with disabilities are encouraged to apply. The University encourages all vendors to establish and maintain a policy to insure equal opportunity employment. To that end, Offerors should submit along with their proposals, their policy of equal employment.
- O. PRODUCT INFORMATION: The Offeror shall clearly and specifically identify the product being offered and enclose complete and detailed descriptive literature, catalog cuts and specifications with the proposal to enable the Commonwealth to determine if the product offered meets the requirements of the solicitation. Failure to do so may cause the proposal to be considered nonresponsive.
- P. PROPOSAL ACCEPTANCE PERIOD: Any proposal in response to this solicitation shall be valid for sixty (60) days. At the end of the sixty (60) days, the proposal may be withdrawn at the written request of the Offeror. If the proposal is not withdrawn at that time it remains in effect until an award is made or the solicitation is cancelled.
- Q. PROPOSAL PRICES: Proposal prices shall be in the form of a firm unit price for each item during the contract period.
- R. PROTEST: Any Offeror who desires to protest the award or decision to award a Contract shall submit the protest in writing to:

Director of Procurement Services  
Virginia Commonwealth University  
912 West Grace, 5<sup>th</sup> Floor  
Richmond, VA 23284

VCU will announce the award utilizing the Commonwealth of Virginia's e-Procurement system (eVA). The protest must be received no later than ten (10) days after the award or the announcement of the decision to award, whichever occurs first. However, if the protest of any actual or potential Offeror depends in whole or in part upon information contained in public records pertaining to the procurement transaction that are subject to inspection under the Rules Governing Procurement of Goods, Services, Insurance, and Construction by a Public Institution of Higher Education of the Commonwealth of Virginia Governed by Subchapter 3 of the Restricted



Higher Education Financial and Administrative Operations Act,, Chapter 4.10 (§23-38.88 et seq) of Title 23 of the Code of Virginia, §34, then the time within which the protest shall be submitted shall expire ten (10) days after those records are available for inspection by such Offeror under §34, or at such later time as provided in this section.

VCU Notices of Award(s) or Notices of Intent to Award may be accessed electronically at <http://www.eva.virginia.gov>.

No protest shall lie for a claim that the selected Offeror is not a responsible Offeror. The written protest shall include the basis for the protest and relief sought.

The VCU Director of Procurement Services shall issue a decision in writing within ten (10) days of receipt stating the reasons for the action taken. This decision shall be final unless the Offeror appeals within ten (10) days of receipt of the written decision by instituting legal action as provided in Section 54 of the Governing Rules.

Nothing in this clause shall be construed to permit a proposer to challenge the validity of the terms or conditions of the RFP. "Days" as used in this paragraph refer to calendar days. If a deadline falls on a Saturday or Sunday, the next business day shall be considered to be the deadline.

- S. **QUANTITIES:** Quantities set forth in this solicitation are estimates only, and the Contractor shall supply at proposal prices actual quantities as ordered, regardless of whether such total quantities are more or less than those shown.
- T. **REFERENCES:** Offerors shall provide a list of at least 3 references where similar goods and/or services have been provided. Each reference shall include the name of the organization, the complete mailing address, the name of the contact person and telephone number.
- | ORGANIZATION | ADDRESS | CONTACT PERSON | TELEPHONE |
|--------------|---------|----------------|-----------|
| 1.           |         |                |           |
| 2.           |         |                |           |
| 3.           |         |                |           |
- U. **RENEWAL OF CONTRACT:** This contract may be renewed by the Commonwealth upon written agreement of both parties for one five (5) year term under the terms of the current contract, and at a reasonable time (approximately 90 days) prior to the expiration.
- V. **SPECIAL EDUCATIONAL OR PROMOTIONAL DISCOUNTS:** The Contractor shall extend any special educational or promotional sale prices or discounts immediately to the Commonwealth during the term of the contract. Such notice shall also advise the duration of the specific sale or discount price.
- W. **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.
- X. **WARRANTY:** All materials and equipment shall be fully guaranteed against defects in material and workmanship for a minimum period of 60 days following date of delivery. Notification will state either that the Contractor shall replace or correct. If the Contractor is required to correct or replace, it shall be at no cost to the Commonwealth and shall be subject to all provisions of this clause to the same extent as materials initially delivered.

**XIII. CONTRACT ADMINISTRATION:**

Upon award of the contract VCU shall designate, in writing, the name(s) of the Contract Administrator(s) who shall work with the contractor in formulating mutually acceptable plans and standards for the delivery, installation and on-going service and/or maintenance that may be required.

- A. The Contract Administrator shall use all powers under the contract to enforce its faithful performance. The Contract Administrator shall determine the amount, quality and acceptability of work and shall decide all other questions in connection with the work.
- B. All direction and orders from VCU shall be transmitted through the Contract Administrator, or his designee. However, the Contract Administrator shall have no authority to order changes in the work which alter the concept or scope of the work or change the basis for compensation to the contractor.

**XIV. ATTACHMENTS:**

**Appendix I: SWaM Form** – Participation in State Procurement Transactions by Small Businesses and Businesses Owned by Women and Minorities:

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Appendix\\_1.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Appendix_1.pdf)

**Appendix II: Invoicing and Payment:**

[http://documents.procurement.vcu.edu/purchasing/pdf\\_docs/forms/RFP\\_Website\\_Link\\_Appendix\\_2.pdf](http://documents.procurement.vcu.edu/purchasing/pdf_docs/forms/RFP_Website_Link_Appendix_2.pdf)

**Appendix III: Product Pricing Schedule** – see attached.

**Appendix IV: Ring Specifications** – see attached.

**Appendix V: Current Regalia Collection** – see attached.

## APPENDIX I

### PARTICIPATION IN STATE PROCUREMENT TRANSACTIONS SMALL BUSINESSES AND BUSINESSES OWNED BY WOMEN AND MINORITIES

The following definitions will be used in completing the information contained in this Appendix.

#### Definitions

- **Small business** is an independently owned and operated business 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. Nothing in this definition prevents a program, agency, institution or subdivision from complying with the qualification criteria of a specific state program or federal guideline to be in compliance with a federal grant or program.
- **Women-owned business** is 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.
- **Minority-owned business** is 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.
- **Minority Individual** "Minority" means a person who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:
  - "Asian Americans" means all persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Marianas, the Philippines, U. S. territory of the Pacific, India, Pakistan, Bangladesh and Sri Lanka and who are regarded as such by the community of which these persons claim to be a part.
  - "African Americans" means all persons having origin in any of the original peoples of Africa and who are regarded as such by the community of which these persons claim to be a part.
  - "Hispanic Americans" means all persons having origin in any of the Spanish speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who are regarded as such by the community of which these persons claim to be a part.
  - "Native Americans" means all persons having origin in any of the original peoples of North America and who are regarded as such by the community of which these persons claim to be a part or who are recognized by a tribal organization.
  - "Eskimos and Aleuts" means all persons having origin in any of the peoples of Northern Canada, Greenland, Alaska, and Eastern Siberia and who are regarded as such in the community of which these persons claim to be a part.

PARTICIPATION BY SMALL BUSINESSES, BUSINESSES OWNED BY WOMEN  
BUSINESSES OWNED BY MINORITIES

This appendix should only be completed by firms that are not Virginia Department of Small Business and Supplier Diversity (DSBSD) certified small businesses.

Offeror certifies that it will involve Small Businesses, Women-Owned Businesses, and/or Minority-Owned Businesses (SWaM) in the performance of this contract either as part of a joint venture, as a partnership, as Subcontractors or as suppliers.

VCU has an overall goal of 42% SWaM participation for all annual purchases and seeks the maximum level of participation possible from all its contractors.

List the names of the SWaM Businesses your firm intends to use and identify the direct role of these firms in the performance of the contract. State whether the firm is a Small Business (SB), Women-Owned (WO), or Minority-Owned (MO).

Name of Businesses:

SB, WO, MO:

Role in contract:


**Commitment for utilization of DSBSD SWaM Businesses:**

\_\_\_\_\_ % of total contract amount that will be performed by DSBSD certified SWaM businesses.

**Identify the individual responsible for submitting SWaM reporting information to VCU:**

Name Printed: \_\_\_\_\_

Email: \_\_\_\_\_

Phone: \_\_\_\_\_

Firm: \_\_\_\_\_

Offeror understands and acknowledge that the percentages stated above represent a contractual commitment by the Offeror. Failure to achieve the percentage commitment will be considered a breach of contract and may result in contract default.

Acknowledged:

By (*Signature*): \_\_\_\_\_

Name Printed: \_\_\_\_\_

Title: \_\_\_\_\_

Email: \_\_\_\_\_

Note: Small, Minority and/or Women-owned business sub-contractors are required to become certified and maintain certification through the Virginia Department of Small Business and Supplier Diversity (DSBSD; <http://www.sbsd.virginia.gov/swamcert.html>) to fulfill the Offeror's commitment for utilization.

## APPENDIX II INVOICING AND PAYMENT

### Invoicing:

The Contractor shall submit a fully itemized invoice to Virginia Commonwealth University, Accounts Payable and Support Services, Box 980327, Richmond, VA 23298-0327, that, at minimum, includes the following information: the Virginia Commonwealth University purchase order number; a description of the goods or services provided; quantities; unit prices; extended prices; and total prices. Payment will be issued in accordance with the payment method selected below and with the Commonwealth of Virginia Prompt Payment Legislation.

Upon request by VCU, the Contractor shall submit invoices electronically using the Ariba Network or other e-commerce channel utilized by VCU; and agrees to comply, within reason, with any future e-commerce initiatives including, but not limited to: procurement, procurement content, sourcing or any other electronic procurement and sourcing solutions.

Questions regarding this method of invoicing should be sent to: [ecommerce@vcu.edu](mailto:ecommerce@vcu.edu).

### Payment:

VCU Procurement Services is automating the payment process to the greatest extent possible. Contractors are encouraged to accept payment electronically through the commercial card program. Please review the payment methods described below and select one for your firm. By selecting the payment method below, Contractor acknowledges that the selected payment method is **not specific to the contract resulting from this solicitation and will apply to all payments made to the Contractor** by Virginia Commonwealth University. For example, if the Contractor has an existing contract(s) and is currently receiving payment by paper check, and the Contractor is now electing to receive payment by the commercial card, **all payments** will be made using the commercial card once the commercial card payment process is implemented for the firm.

#### **Payment Methods**

**1. Electronically through a Wells Fargo Visa commercial card:** Payment will be made ten days (10) after receipt of a proper invoice for the amount of payment due, or ten (10) days after receipt of the goods or services, whichever is later.

It is the Contractor's responsibility to contact its banking institutions to determine any credit limit that may restrict the payment of invoices. It is the Contractor's responsibility to have its credit limit raised as necessary to facilitate the timely payment of all invoices. Invoices exceeding the Contractor's credit limit will be returned unpaid.

Failure to accept the commercial card after award of contract will be considered a contract compliance issue and will be addressed accordingly. In addition, invoices will be returned without payment until the Contractor can accept the payment through the commercial card.

Questions regarding this method of payment should be sent to [commcard@vcu.edu](mailto:commcard@vcu.edu).

2. **ACH:** Electronic payment via automated clearing house (ACH) to the vendor provided bank account of record. Payment is processed thirty (30) days after receipt of a proper invoice for the amount of payment due, or thirty (30) days after receipt of the goods or services, whichever is later. Additional information about ACH payments is available at: <http://treasury.vcu.edu/banking/vendor-ach/>.

**Contractor must indicate the method of payment selected:**

\_\_\_\_\_ Commercial Card Payment (Wells Fargo VISA)  
\_\_\_\_\_ Automated Clearing House (ACH)

**Invoicing and Payment Method Acknowledgement:**

Signature: \_\_\_\_\_  
Name Printed: \_\_\_\_\_  
Title: \_\_\_\_\_  
Name of Firm: \_\_\_\_\_  
Date: \_\_\_\_\_

Please identify the following contact information for the individual who will serve as the appropriate point of contact within your company to be contacted by VCU Accounts Payable to implement the electronic invoicing and payment processes:

Name of the individual: \_\_\_\_\_  
Title: \_\_\_\_\_  
Mailing address: \_\_\_\_\_  
\_\_\_\_\_  
Email address: \_\_\_\_\_  
Phone number: \_\_\_\_\_  
Fax number: \_\_\_\_\_

## APPENDIX III

**Virginia Commonwealth University**  
**Graduation Product RFP**  
**Price Worksheet**

**Contractor Instructions**

The Offeror shall commit to pay a Minimum Annual Guarantee Royalty (MAGR) for the university Fiscal Years (FY) (beginning July 1 and ending June 30) as stipulated in the Request for Proposal (RFP)

	Year 1		Year 2		Year 3		Year 4		Year 5	
Minimum Annual Guarantee Royalty Offer	\$	-	\$	-	\$	-	\$	-	\$	-
MAG Royalty Rate on Total Contract Net Sales		0%		0%		0%		0%		0%

**Contractor Instructions**

By signing below it is stated that the values above represent the Contractor's offer to Virginia Commonwealth University:

Contractor Signature

Title

Date

## APPENDIX III

**Virginia Commonwealth University  
Graduation Product RFP  
Price Worksheet**

**Contractor Instructions**

The Offeror shall complete the highlighted cells below

The following formula will be used to determine the change in price due to increases in the market price of gold.

**(Change in gold market) x (Gold Factor) x (Ring Pennyweight (dwt)) = Price rounded to the nearest \$5 increment**

The following factors will be used for each karat of gold:

**\$1000/oz Fixed Gold Price (for RFP calculation purposes only)**

*Future price increase/decrease will be based London PM Fix.*

<b>Gold</b>	Purity		
	10K	14K	18K
Gold Factor per \$1			





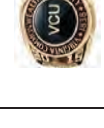




<b>Sample Ring Pricing</b>	dwt	oz	Student Price
Traditional-style Ring (10K Gold, to include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc.)	12	0.658	
	10	0.549	
	8	0.439	
	4	0.219	
	2	0.110	



APPENDIX III

**Contractor Instructions**

The Offeror shall complete the highlighted cells below

Virginia Commonwealth University Official Ring Specifications									
Commemorative Brands, Inc. dba Balfour									
Men's					Women's				
Large Traditional Scholar with Signet Top (SCHOLL SIG)	Large Traditional Scholar with Stone (SCHOLL STN)	Large Signet	Small Traditional Scholar with Signet Top (SCHOLL SIG)	Small Traditional Scholar with Stone (SCHOLL STN)	Small Signet	Illusion	Signature	Windswept	
									
12.5	11	7	8.5	8	4	4	3	2	
<b>INPUT PRICE IN YELLOW CELLS:</b>									
Pennyweight (dwt)									
Silver (Alloy)									
Non-Precious Metal (Alloy)									
Side Design 1 (traditional ring styles only)		choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs
Side Design 2 (traditional ring styles only)		choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs
Side Types Available (applies to signet ring styles, not traditional)	Degree/GradYear/	NA	NA	NA	NA	NA	NA	NA	NA
	Greek Sides	NA	NA	NA	NA	NA	NA	NA	NA
	Split Year Date	NA	NA	NA	NA	NA	NA	NA	NA
Personalization Side 1		degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year
Personalization Side 2		degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year
Stone	Black Onyx	NA	NA	NA	NA	NA	NA	NA	NA
	Smooth	NA	NA	NA	NA	NA	NA	NA	NA
	Faceted	NA	NA	NA	NA	NA	NA	NA	NA
Stone Cut		NA	NA	NA	NA	NA	NA	NA	NA
Engraving		alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available
Stone Details		alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available
		four .02 carat + two .03 carat	four .02 carat + two .03 carat	four .02 carat + two .03 carat	four .02 carat + two .03 carat	four .02 carat + two .03 carat	four .02 carat + two .03 carat	four .02 carat + two .03 carat	four .02 carat + two .03 carat
		four .015 carat + four .01 carat	four .015 carat + four .01 carat	four .015 carat + four .01 carat	four .015 carat + four .01 carat	four .015 carat + four .01 carat	four .015 carat + four .01 carat	four .015 carat + four .01 carat	four .015 carat + four .01 carat
		total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12

**Contractor Instructions**

The Offeror shall complete the highlighted cells below

B. Academic Regalia:










Student Regalia:				
Provide a unit price for the initial term of the				
	Sales Price to Bookstore	Suggested Markup	Suggested Student Price	
Bachelor - (Gown-Cap-Tassel-Hood)	\$ -	+ \$	- \$	-
Master - (Gown-Cap-Tassel-Hood)	\$ -	+ \$	- \$	-
Professional Doctor - (Gown-Cap-Tassel-Hood) (Health Sciences Gown must show degree color)	\$ -	+ \$	- \$	-
PhD - (Gown-Cap-Tassel-Hood) (Gown must show black velvet)	\$ -	+ \$	- \$	-
Tassel	\$ -	+ \$	- \$	-
Tam	\$ -	+ \$	- \$	-

C. Announcements:

Quantity per pack	Unit Cost	Cost Each	Royalty Each
Personalized:	0	\$ -	\$ -
Generic:	0	\$ -	\$ -

Rental Regalia:	
Provide a unit rental cost price for the initial term of the agreement (three years). Prices shall include give-away tassels.	
Bachelor - (Gown-Cap-Tassel-Hood)	\$ -
Master - (Gown-Cap-Tassel-Hood)	\$ -
Professional Doctor - (Gown-Cap-Tassel-Hood) (Health Sciences Gown must show degree color)	\$ -
PhD - (Gown-Cap-Tassel-Hood) (Gown must show black velvet)	\$ -
Tam	\$ -

# APPENDIX IV

Virginia Commonwealth University Official Ring Specifications Commemorative Brands, Inc. dba Balfour										
Men's					Women's					
	Large Traditional Scholar with Signet Top (SCHOL L SIG)	Large Traditional Scholar with Stone (SCHOL L STN)	Large Signet	Small Traditional Scholar with Signet Top (SCHOL S SIG)	Small Traditional Scholar with Stone (SCHOL S STN)	Small Signet	Illusion	Signature	Windswept	
Pennyweight (dwt)	12.5	11	7	8.5	8	4	4	3		2
	10K Yellow and White Gold	X	X	X	X	X	X	X		X
	14K Yellow and White Gold	X	X	X	X	X	X	X		X
	18K Yellow and White Gold	X	X	X	X	X	X	X		X
	Balfour Premium Silver	X	X	X	X	X	X	X		X
Available Metals	Balfour Imperium with Gold	X	X	X	X	X	X	X		X
	Celestrum	X	X	X	X	X	X	X		X
Metal Finish	Antique	X	X	X	X	X	X	X		X
	Natural	X	X	X	X	X	X	X		X
Side Design 1 (traditional ring styles only)	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	NA	NA	NA	NA
Side Design 2 (traditional ring styles only)	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	NA	NA	NA	NA
Side Types Available (applies to signet ring styles, not traditional)	Degree/GradYear/ Greek Sides	NA	X	NA	NA	X	NA	NA	NA	NA
	Split Year Date	NA	X	NA	NA	X	NA	NA	NA	NA
Personalization Side 1	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year
Personalization Side 2	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year
Stone	Black Onyx	X	NA	NA	X	NA	X	X	X	X
Stone Cut	Smooth	NA	NA	NA	NA	NA	NA	X	NA	NA
	Faceted	NA	NA	NA	NA	NA	X	X	X	X
Engraving	Fireburst	NA	NA	NA	NA	NA	NA	NA	NA	NA
	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available
Stone Details	two .01 carat + two .02 carat + two .03 carat	four .02 carat + four .01 carat	four .01 carat	four .01 carat	four .01 carat	four .01 carat	four .01 carat	four .01 carat	four .01 carat	four .01 carat
	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12	total carat wt = .12

VCU Regalia Collection

3.2017

Custom VCU Regalia: Greenweaver Fabric made from recycled plastic bottles, embroidered VCU seal, and embroidered piping on Master gown.  
Bachelor (includes hood and mortarboard)      Master (includes hood and mortarboard)      Doctor (includes mortarboard and hood, tam optional)



Professional Regalia (includes hood and mortarboard): Greenweaver Fabric made from recycled plastic bottles.

Physical Therapy Teal	Pharmacy Olive	MD Green	Dentistry Lilac	Nursing/Nurse Anesthesia Bright Gold
				



# VCU



## SECTION II

Balfour's Response to Request For Proposal 7629420BA  
Virginia Commonwealth University  
Graduation Products - Academic Regalia,  
Class Rings and Announcements

**balfour**®



## VI. STATEMENT OF NEEDS:

This Section describes VCU's requested goods and/or services and the areas to be addressed in Offeror's Proposal; Proposal response must be written in the same order as outlined below. Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities. Emphasis should be placed on completeness and clarity of content. Failure to submit all information requested may result in the elimination of the Proposal from consideration. Proposals that are substantially incomplete or lack key information may be rejected by VCU. Please note that utilization of the words "shall" or "must" indicates a mandatory requirement;

### A. Description of Requested Goods/Services and Proposal Response Requirements:

#### 1. Overview:

- a) The Contractor shall provide written statement acknowledging and agreeing to all mandatory requirement statements included in this Request for Proposal's Section VI; Statement of Needs for all statements that include the utilization of the words "shall" or "must"; Absence of the required written acknowledgement and agreement statement in the proposal response may result in disqualification of your proposal response.

Balfour acknowledges and agrees that it will provide written acknowledgement and agreement to all mandatory requirement statements included in this Request for Proposal's Section VI: Statement of Needs.

- b) Provide a brief history of the firm; Describe the firm's experience in providing graduation products and services to universities of comparable sizes with programs that are similar in complexity; Specify your firm's plan to meet the graduation and recognition product needs of Virginia Commonwealth University.

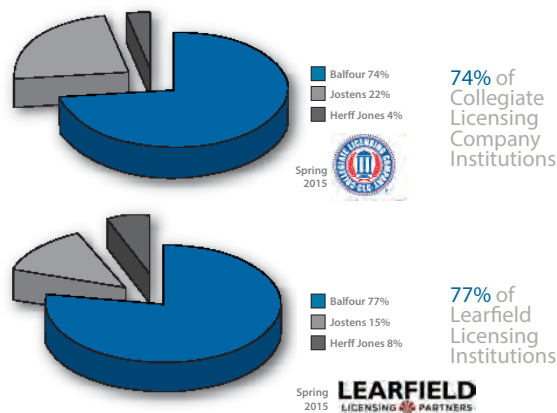
Balfour is a part of American Achievement Corporation and an industry leader in the commemorative products industry. We are proud to serve the North American university and high school markets with commemorative rings and jewelry, graduation regalia, high school and college yearbooks, letter jackets, graduation announcements, diplomas, diploma frames, gifts, and soft goods. Our corporate mission is "To provide our customers with the highest quality recognition products that will forever mark the special moments in their lives."



The Balfour Company was founded in Attleboro, Massachusetts, on June 13, 1913. Lloyd G. Balfour was a jewelry salesman who saw the opportunity of specializing in fraternity jewelry. He offered a superior quality product to help the National Chapters improve the design and distribution of their insignia. Success quickly followed. After World War I, the Company rapidly expanded its line to include college and high school rings and pins, stationery and diplomas, and awards of many kinds. Expanding school populations after World War II helped to produce a period of rapid growth. To support this growth many manufacturing additions and improvements were made, including facilities in North Attleboro, Dallas, Louisville, and in Canada.

Through the 90s and early 2000s expansion was fueled by organic growth as well as acquisition. Among Balfour's acquisitions during that time were ArtCarved of Austin in 1996 and Milestone Traditions in 2002, both of which had deep 100-year histories of production and executional excellence. These brands were successfully merged and marketed under the Balfour Brand and our marketing, sales and manufacturing headquarters was established in Austin, Texas.

With rapid organic and acquisition growth, Balfour further solidified its position as market leader and the Balfour brand became synonymous with excellence in the scholastic recognition products industry. Currently, Balfour supplies approximately 55% of the college market and 75% of Official Ring Programs and proudly partners with more than 1200 institutions.



In addition to Rings and traditional commemorative products, Regalia is part of Balfour's DNA and remains an exciting growth opportunity for the company. As with Jewelry our rapid progress in Regalia can be attributed to a combination of organic and acquisition growth.

As a result of strategic acquisitions Balfour now has the best Regalia distribution network in the industry. Willsie, University, Gaspard and Artneedle were all excellent regional family companies that were united

into a national network under the Balfour umbrella. Consistent among these acquired companies was a 100-year-old commitment to excellence and deeply entrenched philosophy of doing whatever is needed to get the right gown to the right student or faculty at the right time.

In addition to giving us the best distribution network in the industry, these acquisitions have enabled us to offer better customer service, a more extensive product catalog, in-house manufacturing and more competitive pricing for our customers as a result of our increased purchasing power.

Our seven, fully-stocked and fully-staffed, regional distribution facilities across North America give us the ability to react to any situation and ensure that our customers never have any disruption in the service they expect.

As early as 1998 we worked with our customers to develop an environmentally-conscious souvenir gown program. Also, we adhere to the academic costume code set by the American Council on Education. According to academic code, our gowns are a fuller cut and longer than most competitors. The caps are adjustable to ensure proper fit. All hoods meet strict academic code with proper length and velvet width to indicate degree. Cords and buttons are on all hoods, (including Souvenir) which help them hang properly. Our souvenir gowns have a distinct pleat down the front, which is tacked to stay smooth and distinct. Our attention to detail ensures a care-free graduation day for our customers.

Consistent themes run through Balfour's history; highly-personalized management, a diversified product portfolio, and vigorous attention to preserving the firm's reputation for quality and dependability. Balfour is one of the few places where tradition of craftsmanship is still very much a way of life. We are proud of our quality reputation and of the people who built and preserve it. We like to believe that there is still a very real family spirit here that is most unusual in a company our size. We hope you will feel this and realize how important that spirit is to our future success, as it was part of our past. We look forward to continuing our partnership with VCU for a prosperous future.

- c) **The awarded Contractor shall provide a letter of intent to implement or not implement the second 5-year option to renew the agreement for the period July 1, 2023 to June 30, 2028 by no later than July 1, 2022.**

Balfour acknowledges and will comply.



## 2. Class Jewelry:

- a) **The Contractor shall continue the University's program for the sale of class rings. See Appendix IV (Ring Specifications). This approved collection is known as the "Official" collection of rings for Virginia Commonwealth University.**

**Describe the class ring program proposed for Virginia Commonwealth University.**

The Virginia Commonwealth University official ring program was designed as a collaborative effort between various campus constituents representing the interests of the students, alumni and administration. All the elements in the design of the ring were carefully chosen to represent the rich history of VCU and to invite those who have achieved junior class standing to be a part of that history.

The Official Ring of Virginia Commonwealth University is a symbol of academic excellence and allows students and alumni to take a piece of VCU with them wherever they go in the world. The VCU ceremony is a critical element of the ring tradition and an event that is enjoyed by a rising number of students and parents.

Balfour believes strongly that continued support of the ring tradition will bring further growth in participation and ceremony attendance.

- b) **The Contractor may offer additional class rings or jewelry for University consideration. The University, at its sole discretion, may opt to incorporate additional rings into the official collection in the future.**

**Describe the collection of rings/jewelry that will be offered. State how the selection and the program will help enhance the customer's affinity with the University.**

Balfour will continue to offer the Official Ring Collection of VCU. The Official Ring Collection is a defined symbol of VCU and captures the significance of graduating from VCU. There are elements of the ring styles that draw the wearer back to their time at VCU and serve as a constant connection to their experience there. The ring ceremony is a memorable time for participating students and their families, one that (much like commencement) deepens their ties to VCU. Should VCU feel the need to add additional style(s), Balfour can certainly accommodate if necessary.

- c) **The Contractor should provide services typically associated with the sale of class rings and jewelry. These services should include design, production, sales, marketing and warranty.**

**Describe your firm's design services, production techniques and quality control methods.**

Balfour has long been synonymous with the best ring the industry has to offer. Since 1913 we have been the leader in the industry while developing many techniques now considered standards in class ring production. Being the leader in these areas allows us to build on our experience as we continue to manufacture simply the best rings in the industry.

We are dedicated to providing the highest level of quality and workmanship to achieve total satisfaction for each customer who enjoys our product. Our longstanding commitment to quality has ensured that hand finishing operations continue to be an integral part of every one of our rings. We employ more than forty individual finishing steps and eight quality assurance checks to make certain that our high standards are always maintained.

Finally, Balfour will assign a quality control manager in our manufacturing plant who will be responsible for the quality of every ring. This type of commitment, not just to quality, but to the university, is what makes us the gold standard when it comes to producing the symbol of memories.

### **Method of Manufacturing**

Balfour uses the lost wax method that is now used throughout the college ring industry. We use one-piece die construction, which offers a number of distinct advantages:

- Greater durability
- More uniformity
- Precision alignment
- Greater depth of detail

We also have a wide capability in other manufacturing techniques and are able to discuss these with you relative to your specific ring designs. Our manufacturing process involves more than 35 highly-skilled operations that go into the creation of a single ring.

### **Model Making**



Each Balfour college ring begins as a detailed drawing created by our team of artists. Master craftsmen/draftsmen then translate these drawings into three-dimensional sculptures or drawings. Our rings incorporate the most extensive hand modeling in the industry. When given final approval for a design, our tool and die cutters create a precise master model (die) from which the wax pattern is prepared. This superior die provides

a completely accurate wax impression from which each new ring is made.

### Lost Wax Method

The Lost Wax method involves three stages of vacuum-assisted processes: one at wax, one at investment, and one at metal cast. The objective of these vacuum-assisted processes is to improve the quality of the rings by providing a detailed wax pattern with good filling and a dense ring after being cast. The wax injection process eliminates the die wear associated with the die striking method of manufacture and forms a wax pattern of the ring. The investment process then takes these wax patterns and creates a solid-mold around the patterns that is oven-cured to harden the mold and melt out the wax (lost wax) leaving a “negative” of the wax pattern. The molds are then filled with the appropriate metal with the assistance of vacuum during the casting process.

### Finishing

To enhance the special sculptural details that often characterize college rings, we have developed an Antique Finish that is meticulously applied then heat-treated to afford the customer a lifetime of wearing pleasure. For those who prefer a ring with a more classic jewelry look, we also offer the rings in a Natural Gold state. The rings are polished and buffed to create a beautiful shine and then engraved on the inside of the ring for added personalization.

### Quality Control

Throughout its production, each ring is carefully inspected. Any craftsman in our factory is authorized to reject a ring not meeting our quality standards. In addition, each ring must pass through eight designated quality assurance stations. Our quality control experts then give it a final, meticulous quality inspection. A special bar-coded computer reads specifications to ensure complete accuracy.



## The Gold Standard



When gold is mined from the earth and refined to its pure state it is termed 24 karat. Because gold is soft when pure, it must be alloyed with other metals having better wear characteristics. These metals include copper, silver, zinc and nickel; the relative percentages of each vary according to karat and when alloyed produce yellow, green, white or rose gold.



Alloying gold with other metals reduces the gold content, so that 21 karat gold is 87.5 percent pure gold; 18 karat gold is 75.0 percent pure gold; 14 karat gold is 58.3 percent pure gold; and 10 karat gold is 41.6 percent pure gold. These are the preferred karats for fine jewelry. They best combine the beauty, workability and tarnish resistance of gold with the strength and durability of the alloyed metals.

Gold used to manufacture 10K, 14K and 18K rings will be of the quality set forth in the United States Stamping Laws for karat gold. The hardness on the white gold rings will be that which is generally recommended by the industry.



## Alternative Metals

Balfour alloys were developed by expert metallurgists and are today produced under carefully controlled conditions to insure standards are consistently met or exceeded. Our alternative metals, Celestrium™ and Argentium®, are jewelers' grade alloys and are guaranteed never to tarnish, stain or fade. Their specific contents are proprietary, but the joy and excitement they bring to everyone who purchases them is evident.



## Social Conscience

As one of the nation's largest jewelry manufacturers, Balfour utilizes the highest jewelry manufacturing and processing standards, including using reclaimed gold, adhering to the diamond Kimberley process and supporting Oxfam's Golden Rules, using recycled stainless steel, and using environmentally friendly simulated birthstones. Balfour is also a member and complies with all Fair Labor Association employment standards and is a member of the Association for Advancement of Sustainability in Higher Education. Balfour is proud that our rings feature:

**No Blood Diamonds** – The United Nations passed a resolution called the Kimberley Process Certification Scheme that is designed to certify the origins of diamonds and to ensure the stones are not “conflict” or “blood” diamonds. It is Balfour's commitment to you that the diamonds used in our products are conflict free, based on written guarantees provided by our diamond supplier.

**No Dirty Gold** – Balfour was the first class ring company to endorse No Dirty Gold's Golden Rules and calls on the mining industry to extract and manufacture gold under higher social, human rights and environmental standards. For more information about this movement, please visit [www.nodirtygold.org](http://www.nodirtygold.org).

**Environmentally Friendly Simulated Birthstones** – Our simulated birthstones are all lab created stones, with many sharing the same chemical properties as genuine stones. With the exception of diamonds, our stones are not mined and, as a result, are significantly more eco-friendly.

**Recycled Metal** – Our Celestrium™ metal is fine jeweler's stainless steel that is over 95% recycled metal.

## AASHE Membership

Balfour is a proud member of the Association for the Advancement of Sustainability in Higher Education. AASHE's mission is to empower higher education to lead the sustainability transformation. AASHE provides resources, professional development, and a network of support to enable institutions of higher education to model and advance sustainability in everything they do, from governance and operations to education and research.

## Fair Labor Association

Commemorative Brands, Inc., the parent company of Balfour, is a member in good standing with the FLA. In joining the FLA, affiliated companies make a commitment to develop a rigorous program that includes implementing the FLA Workplace Code of Conduct and monitoring to ensure that any violations are identified, addressed and corrected. Their efforts in this regard must meet FLA standards for public disclosure and long term improvement.

### QUALITY CONTROL PROCEDURE FOR JEWELRY OPERATIONS

1. Die Making:
  - a. Production Dies are inspected upon completion of die cutting process to make sure design is accurate representation of artistic design (i.e. school seal, curriculums, mascots, etc.).
  - b. General inspection: All dies/designs inspected for die quality prior to wax operation.
  - c. \* Quality System Documentation (see below)
2. Wax Pattern Making:
  - a. Wax patterns are inspected by each operator for accuracy to job ticket (product specs).
  - b. General inspection: All patterns inspected for wax pattern quality prior to casting operation.
  - c. \* Quality System Documentation (see below)
3. Investment and Casting Operation:
  - a. Rough Cast rings are inspected for accuracy to job ticket (product specs).
  - b. General inspection: All rough cast product inspected for cast quality prior to finishing operation.
  - c. \* Quality System Documentation (see below)
4. Finishing Operation:
  - a. It is the responsibility of the operator for each sequential finishing operation to inspect product prior to passing on to next operator.
  - b. Finished rings are inspected for accuracy to job ticket (product specs).
  - c. General inspection: All finished rings inspected for finish quality.
  - d. \* Quality System Documentation (see below)
5. Group Inspection
  - a. Group orders are reviewed as accumulated in finished goods to assure consistency of finishing technique and ensure execution of any special customer requirements across the group.
  - b. \* Quality System Documentation (see below)

\* Quality System Documentation: All job tickets contain bar codes and each individual order is scanned through the various manufacturing operations from Die Making to Finished Goods at the QA points noted above. Any quality defects requiring the product to be reworked or remade are noted in the floor management system software at that time. QA staff also brings any trends to the attention of personnel and supervision. Manufacturing staff have access to reports that show overall quality issues by operation, by product, or down to individual order for auditing and/or process improvement initiatives.

**Discuss the sales support services available for customers including the following:**

- (a) Minimum deposit requirements**
- (b) Methods of deposit payment**
- (c) Accepted forms of credit**
- (d) Finance programs**

Our personal commitment is to provide friendly and knowledgeable representatives who listen to our customers so we meet and exceed customer expectations. We understand customers have choices and our actions must continually demonstrate how we value and appreciate them. The many testimonial letters we receive remind us and reinforce our mission statement that we are here to provide our customers with the highest quality recognition products that will forever mark the special moments in their lives.

The first key of successful customer service is the people tasked with taking the order. Our training program of bookstore personnel is extensive and would include on site referral information about our procedures, policies and pricing. All information is continually updated and the training is ongoing. This allows most issues to be avoided in the first place and when they arise, they can be resolved at the point of sale.

Having Mike Foltz and Nathan Lavinka and their team as your local bookstore contacts is the next step in supplying excellent customer service. Their experience and dedication insure the optimal buying experience for your students. Mike and Nathan are also the point of contact for any issues or questions that may arise with the bookstore and its staff. They have the background and authority to resolve almost any issue that may arise. If the issue is so large or complicated that it needs to be addressed at a higher level, Dan Murphy will be our next point of contact. All resolutions to major issues will be made after discussions with bookstore management.

Our Customer Service department is focused on supplying all the information a customer might need and on making the purchasing of class rings or announcements a positive experience. Our team of ten customer service phone representatives is committed to providing one call resolution to all incoming phone and email inquiries. There are three dedicated order entry representatives to process paper orders received by mail or fax. This team's experience and Balfour's continual training sessions keep us at the top of the list when it comes to customer satisfaction.

In addition, we have a depth of dedicated resources to support our college partner institutions and end-consumers. We have a dedicated sales and service team account executive strategically positioned to support the Virginia team with executing marketing campaigns in support of on-campus events for Virginia



Commonwealth University. The AE has direct access to our manufacturing facilities and is able to intervene when an order needs to be expedited.

Our customer service is based in Austin, Texas. Our phone support hours of operation are Monday–Friday, 8 a.m.–5 p.m. CST with seasonal weekend and expanded hours staffing to meet customer needs. We provide 24 hour e-mail and internet access for our customers to place orders and to ask questions and we respond the same or next business day.

Operations follow standard work that includes sharing of best practices, quality call calibration sessions from live and recorded calls that include participation from the Service Director, Debbe Martinez. Our service structure maintains an effective mix of dedicated and cross-trained people. Regardless of title, every employee is accessible to our customers.

Through our continuous improvement initiative programs we focus on quality training around customer expectations. Our internal training team provides individual and team-based training positively impacting both customer and employee satisfaction. We exist because of our customers, but our success depends on our employees. The bottom line is that we are committed to meeting our customer needs.

Students and alumni of Virginia Commonwealth University have the following payment options for the purchase of their class ring and/or announcements:

**Paid in Full** – purchasers can pay with cash, check, debit or credit card (Visa, MasterCard, American Express and Discover).

**Interest Free Credit Card Payment Plan** – Customers may choose to use Balfour’s convenient, interest-free credit card payment plan. The interest-free payment plan automatically divides the total due into three equal payments which are charged to the customer’s credit card monthly until the balance is paid in full. No finance or handling charges are required. This plan is only available for the purchase of rings.

**PayPal** - Balfour has recently added PayPal and PayPal Credit which will provide great benefits to our customers. Customers will now have the option of selecting PayPal Credit with a minimum purchase of \$99 on any product. This means that consumers will now be able to finance their ring or graduation announcement orders if they total \$99 or more. PayPal is only available for on-line ordering.

**State the firm's warranty policy including the following.**

- (a) Length and conditions of guarantee regarding defects in materials and workmanship**
- (b) Length and conditions of guarantee regarding stones and stone decorations.**
- (c) Provide conditions and associated charges for ring sizing and adjustments; for replacement of damaged rings; for restoring ring finish; and for changes in academic designation and graduation year.**
- (d) State the refund policy for students who fail to graduate in the year designated on the ring and the process for resolving disputes.**

Our personal commitment is to provide friendly and knowledgeable representatives who listen to our customers so we consistently meet and exceed customer expectations. Quality service starts with preparation and training. All of our representatives and customer service staff get intense and ongoing training. University and bookstore personnel will be provided our contact information so they can easily reach out to us if they encounter a problem.

In the field, our representatives are trained on how to effectively work with students and staff. If there is an issue, we try to solve it on the local level with personal attention through our field representatives.

If the issue happens away from the school, customers can always call our toll free number (1-866-BALFOUR) for resolution.

Balfour is committed to service support and our commitment is to always treat customers fairly and with respect. We listen and we react and we always try to solve the issue right then, not delay or pass off the issue to other entities. The evidence is seen in our customer list and our rate of retention.

## BALFOUR COLLEGE LIMITED LIFETIME WARRANTY\*

Your Balfour College ring is hand-crafted to meet your complete satisfaction. Only the finest materials have been used to ensure years of enjoyment. The following services will be performed without charge for the original owner of the Balfour College ring:

- Repair defects in workmanship or materials at the time of original delivery.
- If repairs cannot be made due to defects in workmanship and materials, the product will be replaced at Balfour's discretion.
- Resize ring (all rings can be resized up to two sizes).
- Clean and polish your ring.
- Genuine stones and diamonds are not covered.
- Should your year of graduation or degree change at the same school, a change to your ring will be made at no charge (limited to one occurrence for year date and one occurrence for degree). A charge may apply for engraving changes where year date or degree is included.
- No other change from the original order is permitted under the warranty.
- This warranty is void if work is performed on your ring by someone other than Balfour.
- If the ring is damaged or worn beyond your satisfaction, it may be exchanged for a ring of current design at Balfour's current remake charge.
- Damages resulting from improper handling, lack of care, or normal wear and tear are not covered by this warranty.

This warranty gives you specific legal rights, and you may also have other rights which vary from state to state. In the event your college ring needs warranty or non-warranty service, return your ring insured with a letter of instruction to:

Balfour College Rings  
Attn: Repair Dept  
P.O. Box 149207  
Austin, TX 78714-9207

When shipping via UPS or FedEx use the following address:  
7211 Circle S Rd.  
Austin, TX 78745-6603

Please include payment for return shipping, handling and insurance fees and any applicable sales tax (\$14.95 for ground shipment, \$19.95 for second-day service and \$24.95 for overnight service). Return shipping, handling and insurance fees apply to all warranty and non-warranty services.

\*For rings purchased since 1972.

Warranty terms and conditions are subject to change on Balfour's notice during the term of this agreement.

College Rings Chargeable Repair Schedule*	
Description of Service or Repair	Charges if Purchased After 1972
Resizing	No Charge up to 2 sizes
Cleaning and polishing	No Charge
Change graduation date	No Charge (one time oly)
Change degree	No Charge (one tme only)
Replace damaged or defective simulated stone	No Charge
Replace defective encrusting	No Charge
Replace genuine stone	\$50 plus Cost of Genuine Stone
Change incorrect engraving	No Charge
Add or change engraving	\$25
Refurbish ring**	\$25
Change simulated stone to another color or change stone enhancements	\$50
Change genuine stone to another color or change stone enhancements	\$50 plus any difference in the cost of genuine stones
Change school name	\$100 for non-gold alloys \$175 for gold
Change finish (antique to natural or natural to antique)	\$100 for non-gold alloys \$175 for gold
Change style	\$100 for non-gold alloys \$175 for gold + cost between different style types
Change metal quality	\$100 for non-gold alloys \$175 for gold plus difference in metal grades
Shipping, handling and insurance(for return of repaired rings)***	\$14.95 (UPS ground) \$19.95 (second day) \$24.95 (overnight)

Many repairs stated above are option changes and are not covered by Balfour's Limited Lifetime Warranty.

Replacement of genuine stones and diamonds is not covered by Balfour's Limited Lifetime Warranty.

\*Fees subject to change during the term of this agreement due to the fluctuating precious metals markets.

\*\*Refurbishing services include cleaning, polishing, tightening or replacing stone, replacing epoxy, removing surface scratches, replacing antiquing (if applicable) and repairing dented bezels.

\*\*\*Sales tax and return shipping, handling and insurance will be added to the repairs listed above (repairs due to defects in workmanship or materials will be excluded from return shipping charges).

## RING LOSS PROTECTION PLAN

Balfour rings are automatically protected against loss or theft. If your ring is lost or stolen, Balfour will replace the ring. This protection plan is in effect for four years from the date of purchase on all original orders after August 1, 1996, and is limited to a single replacement of your original college ring during the four-year period.

Requirements for replacement:

- Ring Loss Protection Plan Certificate
- Original Invoice
- Specs for replacement rings must be identical to original ring
- Request for replacement must be made within 45 days from the date of loss
- Police report number (as applicable)

Send request for replacement with original invoice, the certificate and a check or money order for the deductible associated with the metal quality of your ring plus shipping, handling, and sales tax to:

Balfour  
ATTN: Ring Loss Protection Plan Department  
7211 Circle S Rd.  
Austin, TX 78745

or

Balfour  
PO Box 149056  
Austin, TX 78714

The Ring Loss Protection Plan terms are subject to change at Balfour's notice.

## EXTENDED RING LOSS PROTECTION PLAN

Just \$29.95 protects your ring for 10 years!

Your Balfour College Ring is automatically protected against loss or theft for four years from the date of purchase on all original rings purchased after August 1, 1996. With the purchase of the Extended Ring Loss Protection Plan, if your ring is lost or stolen, Balfour will replace it for up to ten years from the date of original purchase. The Extended Ring Loss Protection Plan is available for rings purchased on or after August 1, 2012. This plan is limited to a single replacement of your original college ring during the ten-year period.

This Ring Loss Protection Plan excludes diamonds, precious stones, Military Academy rings, Championship rings and Texas A&M University rings (Aggie rings).

\*Check [balfour.com](http://balfour.com) for the current deductible amounts for both the Ring Loss Protection Plan and the Extended Ring Loss Protection Plan.

- d) **The Contractor should provide for the University's need to design additional rings and jewelry as necessary and work with the assigned committee as appropriate. The ring/jewelry styles may be re-designed as necessary to include new VCU marks and elements.**

**Describe the contractor's capability to accommodate the University's need to design additional rings and jewelry when necessary.**

If the University decides to add or redesign additional rings and jewelry, Balfour is able to provide custom artwork. Balfour will work closely with the necessary parties of VCU to ensure that these changes support the integrity of the existing ring program.

- e) **Virginia Commonwealth University shall approve all designs, artwork, and mock-up rings and jewelry items prior to production; The jewelry selection will be featured as the "Official" collection to qualified students.**

Balfour acknowledges and agrees.

- f) **The Contractor will have exclusive trademark rights for the sale of class jewelry to students. However, VCU Alumni (to include the MCV Alumni Association of VCU) may market class jewelry (exempting rings) bearing VCU's marks and logos to alumni under a separate agreement.**

**Acknowledge and agree.**

Balfour acknowledges and agrees.

- g) **The title to dies and molds used in the manufacture of VCU class rings/jewelry shall be vested in the University. The Contractor shall retain all dies and molds and maintain such dies and molds in first class condition. In the event the Contractor determines that dies or molds are to be destroyed or otherwise disposed, the Contractor shall deliver dies and molds to Virginia Commonwealth University.**

Balfour acknowledges and agrees.

- h) **Price changes for jewelry shall be allowed annually on June 15th of each year based upon the London PM fix for that date: <https://www.theice.com/marketdata/reports/178>**

Balfour acknowledges and agrees.

- i) **The following formula shall be used to determine the change in price due to changes in the market price of gold:**

- j) **(Change in gold market) x (Gold Factor) x (Ring Pennyweight (dwt)) = Price rounded to the nearest \$5 increment**

The following factors will be used for each karat of gold:

Metal Type	per \$1	for every \$10
10K =	0.021	0.21
14K =	0.029	0.29
18K =	0.038	0.38

Prices may also be adjusted with any modifications to royalty or trademark licensing fees at any time during the initial term or any renewal period.

- k) **New ring retail prices shall take effect on July 1st of each year during the initial term or any renewal period.**

Balfour acknowledges and agrees.

**Describe the alloy metal content (with percentages of each metal) of your Silver rings.**

Balfour is now a member of the Argentium® Silver guild, a group of jewelry designers and manufacturers licensed to use the Argentium® Silver alloy. Argentium® Silver provides superior benefits over those of sterling silver and other silver alloys currently available in the class ring market. Among those benefits:

- Argentium® Silver is purer than sterling silver - .935 versus .925.
- Argentium® Silver is brighter and whiter than white gold, Celestrum and sterling silver.
- Argentium® Silver does not require plating and is the natural color of pure silver.
- Argentium® Silver provides better tarnish resistance, keeping the VCU ring easy to care for and simple to clean.
- Argentium® Silver is hypoallergenic and better suited for those who are unable to wear traditional sterling silver. (Argentium does not contain nickel).

Balfour proposes replacing its current Balfour Premium Silver™ offering with Argentium® Silver for improved value to the VCU ring buyer. A VCU official ring crafted in Argentium® Silver will be covered by Balfour's Limited Lifetime Warranty.

Note: Argentium® Silver is .935 silver and germanium. The exact concentration of germanium and other contents of the alloy are proprietary to Argentium International Limited. Argentium is a registered trademark of Argentium International Limited.



- l) Complete Pricing Schedule (Appendix III – tabs for Gold Rings & Silver, etc. Rings). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.**

Pricing Schedule is included as attachment in Section III of the document. The pricing shown is provided at the requested gold market rate of \$1,000 per ounce in the dwts provided in the schedule.

Ring pricing includes:

- A \$100 royalty per ring
- A flat \$10 licensing fee, the current rate paid for trademark licensing rights for use of the marks of VCU on its official rings
- The expenses to support the marketing plan and on-campus dates presented in the Marketing and Promotion Plan
- A choice of white or yellow gold in karat qualities
- A choice of natural or antique finishes
- Stone enhancements such as encrustings
- Cubic zirconia side stones available in the Illusion, Windswept and Signature styles
- Inside engraving
- Balfour's interest free credit card installment plan
- Balfour's Limited Lifetime Warranty
- Balfour's Four Year Ring Loss Protection Plan

Retail pricing will be adjusted as the result of changes in the material cost of gold, metal alloys containing platinum or silver or other precious metals in accordance with h through k above. Retail prices will also be adjusted with any modifications to commission or trademark licensing fees.

- m) In addition to your price submission, list upcharges for all potential features that could be added to the base price of the ring. Features might include full name engraving, stones, stone cuts, stone seal, panel tops, and special finishes.**

Many of the options listed in this question are included in the base price of the VCU ring (for detailed list see our response in l above). Feature options that are not included in the ring pricing shown in the Pricing Schedule are:

- RAW™ by Balfour finish - \$50
- Extended Ring Loss Protection Plan - \$29.95
- Greek options - \$25
- Diamond side stones in Illusion, Windswept and Signature styles – vary by style
- Shipping and handling fees - \$14.95
- Sales tax – varies based on destination shipping address

- n) **The Contractor should support jewelry sales by providing sales support materials. Describe the sales support and point of presentation material that will be provided at no charge including:**

Balfour will provide two to four sales representatives for ring and announcement promotions as well as Grad Fairs throughout the year. In addition, Balfour will provide a full staff to support all regalia related promotions.

**(a) Point of presentation display cases**

Balfour will work with VCU to design updated graphics for the ring display that is currently in the Bookstore and will be changed out at key points during the year. One set of graphics will be designed around Grad Fair and another will be focused on the VCU ring tradition. Balfour representatives will change out these graphics at the appropriate times throughout the year and will ensure they have the most impact. Balfour will provide a presentation case for the VCU ring collection to be displayed on campus at a prominent location the VCU committee feels will best showcase the collection to the most traffic.

**(b) Ring samples**

Balfour will add fresh samples of the Official Ring Collection at VCU to the promotion collection each year of this agreement. These samples will be displayed in the most prominent location on campus determined by the VCU committee as well as during ring promotions.

**(c) Website access to sale and support information**

Balfour will maintain a 24/7 online presence for the VCU Ring offering where students and graduates can conveniently view the ring and learn more about the ring tradition. In addition to all on-campus promotions, VCU Rings may be ordered online at any time.

**(d) Toll-free phone numbers for service**

1-866-225-3687

**(e) Copy of the warranty and a care manual**

Please refer to Section VI.A.2.c for full warranty information.

## Caring For Your Balfour Ring

As a proud owner of a fine ring by Balfour, some simple care and a few precautions will ensure your long-term enjoyment of your ring. The natural qualities of gold and silver allow them to tarnish. However, you can remove tarnish easily with any good silver polish. After applying the polish with a soft cloth, clean your ring in a mild soapy solution. Then rinse the ring in clear water and dry. Chemicals can discolor your ring. Some, like mercury, chlorine or household chemicals, can cause permanent damage. Your ring can also be damaged in any form of heavy manual labor. To protect your ring, remove it whenever doing heavy work, whenever exposed to chemicals, while working on or near heavy machinery, or when working with power tools. Since temperature and exercise affect finger size, wear your ring for at least two weeks before considering any size adjustment.

- (f) Meeting regularly with representatives from VCU Alumni and Business Services to evaluate the program and make changes as needed**

Balfour will meet with representatives from VCU Alumni and Business Services consistently throughout this agreement. Balfour will participate in monthly conference calls with VCU representatives and will meet in person at least once a semester to continue evaluating the ring program. This collaboration is critical to the continued success of this program. Balfour will remain responsive to necessary changes.

- o) The Contractor shall provide a digital 3d model of any official class ring per the University's request.**

Balfour acknowledges and agrees.

- p) The Contractor should conduct a minimum of six (6) ring sales (three per semester) each contract year, to include at least two sales on the MCV Campus. Sales events on the Monroe Park Campus should include evening hours.**

**State the minimum frequency, location and duration of on-campus ring sale events.**

Please see Balfour's proposed marketing plan in Section s. below.

- q) The Contractor should have a well-developed marketing plan for class rings and jewelry.**

Please see section 2.s below for complete detail of Balfour's marketing plan.

- r) The Contractor should sell class jewelry on campus in-person and as well as on the Internet.**

Balfour acknowledges and agrees.

- s) The Contractor may use locations in the University retail stores to support campus sales.

Provide a marketing plan for class rings and jewelry.

Growth of the VCU Official Ring Program is a top priority for Balfour, in fact we have ambitions to double the current number of student participants during this upcoming contract period. To do so, we propose an aggressive marketing program as outlined below. Strategically we will rely heavily on peer-to-peer grassroots marketing to create an added dimension to our traditional marketing plans. We will recruit, train and compensate 5 student ambassadors with the goal of enhancing the important ring tradition and ceremony currently in place. Balfour will collaborate with the University, the student ambassadors and other campus constituents to develop a marketing plan best suited to VCU students. The marketing plan will incorporate many of the tactics shown in the calendar below with an estimated annual spend of \$30,000.

In addition to the marketing investment for the VCU Official Ring Program, Balfour will supply \$8,500 annually to VCU to cover expenses associated with Ring Ceremony and various ring related initiatives.

### FALL SEMESTER:

CEREMONY ORDERING - FALL	DESCRIPTION	MARKETING MATERIALS
<b>Dates</b>	Target: Juniors & Seniors	<ul style="list-style-type: none"> <li>• Brochure Mailer to Newly Eligible Students</li> <li>• Email &amp; MobileUP Notifications to Juniors &amp; Seniors</li> </ul>
Late August/Early September	1st opportunity of Semester for students to order their VCU Ring for Fall Ceremony.	<ul style="list-style-type: none"> <li>• Social Media Campaign thru Alumni Office &amp; Student Ambassadors</li> <li>• STAT &amp; Alumni Assoc. Discount</li> <li>• Photo Booth for students to share they've just ordered #VCU Ring</li> <li>• Posters</li> <li>• Table Tents</li> <li>• Digital TV Marketing</li> <li>• Lamp Post Banners</li> <li>• "Ring Week" Banners</li> </ul>
<b>Location</b>		
Monroe Park Campus Commons Lobby (outside POD)		
<b>Time</b>		
11 am - 5 pm		<p>GRASSROOTS MARKETING IDEAS:</p> <p>Local Marketing—Coffee sleeves/coasters to give out to popular student destinations</p> <p>Movie Night at Library/Commons</p> <ul style="list-style-type: none"> <li>- Offer students popcorn and candy</li> <li>- Branded paper cups to give the popcorn in</li> <li>- Better seats/free food/free shirt/raffle for Balfour gifts</li> </ul> <p>Student Ambassadors:</p> <p>Local Marketing:</p> <p>Window painting at Commons /chalking (or applicable application)</p> <p>Chalk/window paint competition—winner gets discount on ring</p>

GRAD FAIRS - FALL		DESCRIPTION	MARKETING MATERIALS
<b>Dates</b>	October	Target: Seniors	<ul style="list-style-type: none"> <li>• Grad Fair Mailer to Graduating Seniors</li> <li>• Email &amp; MobileUP Notifications to Seniors</li> <li>• Social Media Campaign thru Alumni Office &amp; Student Ambassadors</li> <li>• STAT &amp; Alumni Assoc. Discount</li> <li>• Posters</li> <li>• Table Tents</li> <li>• Digital TV Marketing</li> </ul> <p>GRASSROOTS MARKETING IDEAS: Student Ambassadors: Local Marketing:</p> <ul style="list-style-type: none"> <li>• Window painting/chalking (or applicable application)</li> <li>• Traditions scavenger hunt around campus. Winner(s) receive a discount or something free</li> </ul>
<b>Location</b>	MCV Campus: Larrick Student Center	Last chance for students to order their VCU Ring for Fall Ceremony	
	Monroe Park Campus: Barnes & Noble on Broad St.	Get the essentials for Graduation at the Grad Fair - cap and gown, graduation announcements, etc.	
<b>Time</b>	MCV: noon - 6 pm Monroe Park: 11 am - 7 pm		
RING CEREMONY - FALL		DESCRIPTION	MARKETING MATERIALS
<b>Dates</b>	Early December	Target: Ring Recipients	<ul style="list-style-type: none"> <li>• Ceremony Invitation mailed to student homes</li> <li>• Email &amp; MobileUP Notifications to Seniors</li> <li>• Social Media Campaign thru Alumni Office &amp; Student Ambassadors</li> <li>• STAT &amp; Alumni Assoc. Discount</li> <li>• Posters</li> <li>• Table Tents</li> <li>• Digital TV Marketing</li> </ul> <p>GRASSROOTS MARKETING IDEAS: Student Ambassadors: Local Marketing:</p> <ul style="list-style-type: none"> <li>• Window painting/chalking (or applicable application)</li> </ul>
<b>Location</b>	Cabell Library (or other location TBD), Barnes & Noble on Broad St.	Ceremony Delivery + 2 additional service days for pickup & repairs at B&N	
<b>Time</b>	TBD		
NEW IDEA - NETWORKING ETIQUETTE EVENT		DESCRIPTION	MARKETING MATERIALS
<b>Dates</b>	Late October/Early November	Target: Juniors & Seniors	<ul style="list-style-type: none"> <li>• Email &amp; MobileUP Notifications to Juniors &amp; Seniors,</li> <li>• Social Media Campaign thru Alumni Office &amp; Student Ambassadors, Table Tents Digital TV Marketing,</li> <li>• Raffle for Balfour Gift Products</li> <li>• Offer ordering of announcements and Gift products for entering the workforce</li> </ul> <p>GRASSROOTS MARKETING IDEAS: Student Ambassadors: Local Marketing:</p> <ul style="list-style-type: none"> <li>• Window painting at Commons /chalking (or applicable application)</li> </ul>
<b>Location</b>	TBD	Classy networking event, cohosted with Alumni Association, with fine food and education on proper dinner etiquette.	
<b>Time</b>	7 pm - 9 -pm		

## SPRING SEMESTER:

CEREMONY ORDERING - SPRING		DESCRIPTION	MARKETING MATERIALS
<b>Dates</b>	Late January/Early February	Target: Juniors & Seniors	<ul style="list-style-type: none"> <li>• Brochure Mailer to Newly Eligible Students</li> <li>• Email &amp; MobileUP Notifications to Juniors &amp; Seniors</li> <li>• Social Media Campaign thru Alumni Office &amp; Student Ambassadors</li> <li>• STAT &amp; Alumni Assoc. Discount</li> <li>• Posters</li> <li>• Table Tents</li> <li>• Digital TV Marketing</li> <li>• Lamp Post Banners</li> <li>• "Ring Week" Banners</li> <li>• Laptop Stickers</li> </ul>
<b>Location</b>	Monroe Park Campus Commons Lobby (outside POD)	1st opportunity of Semester for students to order their VCU Ring for Spring Ceremony.	<p>GRASSROOTS MARKETING IDEAS: Tailgate/tent at basketball game</p> <p>Student Ambassadors: Local Marketing:</p> <ul style="list-style-type: none"> <li>• Coffee sleeves/coasters to give out to popular student destinations</li> <li>• Chalking Streets</li> <li>• Bring ring donuts to classes</li> </ul>
<b>Time</b>	11 am - 5 pm		
GRAD FAIRS - SPRING		DESCRIPTION	MARKETING MATERIALS
<b>Dates</b>	LATE February/Early March	Target: Seniors	<ul style="list-style-type: none"> <li>• Grad Fair Mailer to Graduating Seniors</li> <li>• Email &amp; MobileUP Notifications to Seniors</li> <li>• Social Media Campaign thru Alumni Office &amp; Student Ambassadors</li> <li>• STAT &amp; Alumni Assoc. Discount</li> <li>• Posters</li> <li>• Table Tents</li> <li>• Digital TV Marketing</li> </ul>
<b>Location</b>	MCV Campus: Larrick Student Center	Last chance for students to order their VCU Ring for Fall Ceremony	
	Monroe Park Campus: Barnes & Noble on Broad St.	Get the essentials for Graduation at the Grad Fair - cap and gown, graduation announcements, etc.	<p>GRASSROOTS MARKETING IDEAS: Student Ambassadors: Local Marketing:</p> <ul style="list-style-type: none"> <li>• Window painting/chalking (or applicable application) Chalk/window paint competition—winner gets discount on ring</li> </ul>
<b>Time</b>	MCV: noon - 6 pm Monroe Park: 11 am - 7 pm		
RING CEREMONY - SPRING		DESCRIPTION	MARKETING MATERIALS
<b>Dates</b>	Early May	Target: Ring Recipients	<ul style="list-style-type: none"> <li>• Ceremony Invitation mailed to student homes</li> <li>• Email &amp; MobileUP Notifications to Seniors</li> <li>• Social Media Campaign thru Alumni Office &amp; Student Ambassadors</li> <li>• STAT &amp; Alumni Assoc. Discount</li> <li>• Posters</li> <li>• Table Tents</li> <li>• Digital TV Marketing</li> </ul>
<b>Location</b>	Cabell Library Barnes & Noble on Broad St.	Ceremony Delivery + 2 additional service days for pickup & repairs at B&N	<p>GRASSROOTS MARKETING IDEAS: Student Ambassadors: Local Marketing:</p> <ul style="list-style-type: none"> <li>• Window painting/chalking (or applicable application)</li> </ul>
<b>Time</b>	TBD		

At the start of this agreement, VCU partners are invited on an all expense paid trip to visit our facilities in Austin, TX and Dallas, TX. (\$3,000 value)

In Austin, TX, VCU partners will be able to see the ring manufacturing process first hand. We encourage VCU to use this opportunity to create a virtual reality experience to share with students on campus and alumni around the world.

In Dallas, TX, VCU partners will visit Balfour's brand new Launch Lab. The Launch Lab is where our marketing and creative teams collaborate to generate innovative materials for the VCU ring program.

Balfour is excited to bring VCU to their facilities in Texas and strongly believe that this trip will benefit the VCU ring program.

Together, the VCU Official Ring Program will reach new heights.

**(a) Specify key events and approximate dates.**

See Balfour's proposed marketing event chart above.

**(b) Describe the dollars and/or percentage off ring sales promotion including the amount off and the number of times the promotion will be offered.**

Balfour will offer a \$60 discount on orders for precious metals for VCU alumni or STAT members (discount for Celestrum ring orders will be \$30).

**(c) Provide samples of the customized marketing media that will be used.**

Please refer to Section VII for examples of the new proposed marketing materials for VCU in addition to the hard copy samples included with the RFP.

**(d) Describe the direct mail program.**

Direct mail is a key component of the marketing mix supporting key events noted in the marketing calendar in the section above. Balfour is the leader in the use of Direct Mail in the promotion of graduation products. Direct Mail has proven time and again to be one of our most effective advertising media especially when targeting parents. Our experience indicates that targeting seniors and their parents increases promotion sales an average of 56%. We have included some examples of the pieces Balfour will develop to support grad product sales during the next contract term including a redesigned brochure and grad fair packet.



- (e) Describe other marketing processes that will be used. State how the medium will be beneficial and approximately the frequency of use.

Balfour is excited to incorporate several new marketing processes.

As the exclusive partner of MobileUp, Balfour has a deep understanding of this revolutionary technology and is able to seamlessly incorporate the app in promoting the Official Ring Program.

Working with student ambassadors, Balfour will be able to support VCU in an organic way. Balfour will meet with these student ambassadors on a regular basis and will remain flexible to their suggestions.

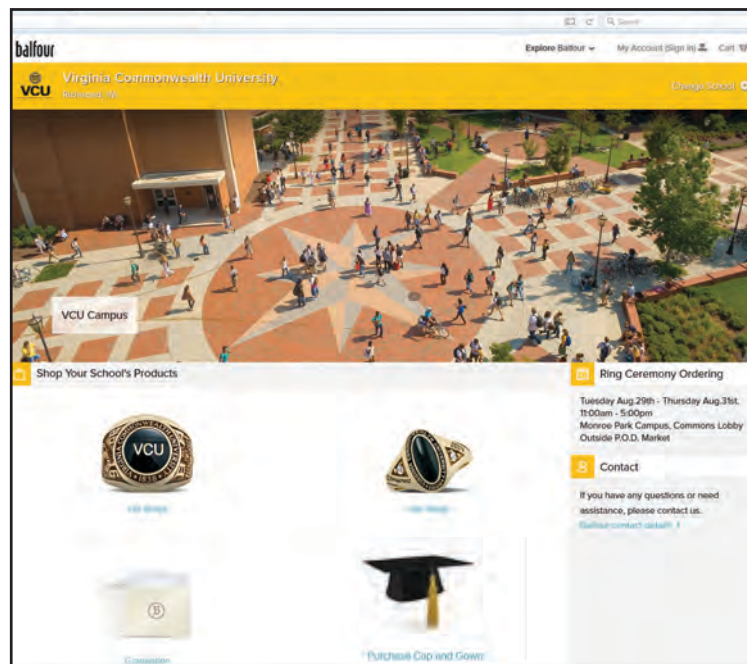
Balfour suggests supporting a new event on campus. By sponsoring a new event, Balfour believes that it will help the ring program reach a new audience. For example, the etiquette dinner is a great way to cross promote.

Lastly, the arts are a fundamental part of VCU. Balfour proposes a design contest with VCU Arts to create a custom shank to celebrate the arts on the Official Class Ring. This shank will be unique to VCU and only available on the VCU ring.

For other planned marketing processes, please refer to the marketing materials listed in the chart above.

- (f) Provide a sample website or URL showing the proposed VCU website.

<http://www.balfour.com/vcu/>





**(g) Describe how the website will be used to market class rings, regalia and other products.**

Balfour maintains a 24/7 online presence where students and graduates can conveniently view the products and learn more about the offering. In addition to all on-campus promotions, products may be ordered online at any time through this channel. The VCU home page enriches the branding of schools through the various areas that are customized to the school including the color of the banner across the top of the page, the VCU seal, the school's specific product images, a University campus photo and information regarding upcoming events. The site can be further customized by adding such content as a video of the Making of the Ring.

To provide a cohesive look throughout all channels of communication with our target audiences, Balfour has customized the level of online support from product configuration to school colors, lifestyle images, seals, and event information for our partner schools. Balfour publishes the unique urls of our school partners in collateral materials enabling the consumer to immediately connect with their school on [balfour.com](http://balfour.com), bypassing the school finder (example: [balfour.com/vcu](http://balfour.com/vcu)).

[Balfour.com](http://Balfour.com) is a valuable tool when the student and parent are researching the ring purchase. Students can view available options, design a ring and share it with their parents. It is amazing the number of students who attend the ring event with just a few more questions about their ring before completing their purchase either directly with one of our representatives or online. Further refinements to the online ring configuration process have led to a significant increase in order conversion. These refinements have also afforded us the ability to support in field order taking sessions with real time ordering via laptops and tablet devices. Overall, online ring orders now represent 30% of total volume and online announcement orders are 70%.

Visits to [balfour.com](http://balfour.com) from mobile phones and tablets are up 54% and 45% respectively over the prior year while transactions are up more than 50% from both devices. Recognizing that the consumers' expectations of their online experiences are rapidly changing, Balfour has brought further enhancements to the website including: additional customization at the school level with custom messaging at order confirmation and email confirmations, with flexibility in content at the school home page and with school level promotions. The consumer experience has been augmented by providing a common shopping cart, utilizing Responsive Web Design techniques and frameworks to seamlessly support any device accessing our ecommerce sites.

Balfour will provide graphics such as web banner ads that link back to the VCU home page on balfour.com for ring, announcement and cap and gown products at key promotional times of the year such as ring weeks, grad fairs, Parents Weekends, and graduations.

For complete web information on regalia, please refer to Section 3.t about Balfour's Buildagrad on-line ordering.

- t) **The contractor shall request written approval for all marketing materials from the VCU Business Services Marketing Manager or delegate at least two weeks in advance of the production of any marketing materials, and shall not produce any marketing materials without receiving approval.**

Balfour acknowledges and agrees.

- u) **The Contractor shall provide an accounting of all VCU jewelry sales through all venues annually. (See Section "VI. 7; Reporting")**

Balfour acknowledges and agrees.

- v) **The Contractor shall offer a dollar discount on class rings to the VCU Alumni Association.**

**Provide the dollar discount will your offer VCU Alumni on class rings.**

Balfour will offer a \$60 discount on orders for precious metals for VCU alumni or STAT members (discount for Celestrum ring orders will be \$30).

- w) **The Contractor shall provide information on the ring ordering process to the bookstore and meet with the bookstore annually to discuss. The contractor shall provide clear messaging to students advising them where they can find additional information about the ring program.**

Balfour acknowledges and agrees.

### 3. Academic Regalia:

- a) **The Contractor should propose a program for the solicitation and distribution of quality regalia for students to be sold through the VCU Bookstore.**

Balfour continues to be a leader in innovative approaches to regalia distribution to address the needs of the graduates and University communities alike. Your graduates worked hard to earn their degree; Balfour works hard to make getting their regalia easy.

#### **Balfour On Your Campus:**

High efficiency on-campus distribution events working with campus retail commencement office partners, Balfour's clear product labeling, barcoding, and personalized packaging reduce distribution errors and make it easy for quick training of the distribution team.

During On-Site distribution events an experienced, campus dedicated Balfour team member, knowledgeable in the processes and procedures of the campus, academic regalia protocol, and the product will be on-hand to oversee the process and ensure a high quality customer experience.

All of the regalia is packed by degree for easy set-up and clearly labeled for easy distribution by the on-site team. Balfour's on-site regalia management team is experienced in working with the university community to hire additional regalia service staff. All caps and gowns will be individually packaged with the matching cap, gown, hood and tassel.

In the event of late registration, Balfour will have extra regalia available. Balfour's guarantee is that each graduate will have a gown and the appropriate hood, stole or other commencement item; even if it means last-minute manufacturing. We will increase our inventory to match the needs of your school.

Commencement Fair – provide experienced support staff member(s) to work with students and staff to distribute regalia in an accurate and efficient manner. Continue to introduce new technology to address volume and improve process.

#### **Balfour to Your Door:**

For customers and institutions where getting to campus could pose a challenge, Balfour's proven ship-to-home regalia model stands ready.

Balfour began working with University-wide individual regalia shipping as early as 1990. In 2001 the first automated system was implemented to address the needs of an entire campus community, rolling out a program that allowed any student an option to securely place an order for a cap and

gown, having it shipped directly to their home or office. In 2009 the system and process were completely overhauled to address the increasing demand for the service, ecommerce security and reporting functions. Currently, about 60% of Balfour's collegiate regalia customers are offering an individual shipping option to their graduates. Increasingly busy schedules, new distance education programs, expanded evening and graduate programs have greatly contributed to the programs growth, bringing on such high volume local partners as the University of New Hampshire system, Bentley University, University of Massachusetts Medical School, Wheelock College, and Cambridge College; some shipping as much as 100% of their regalia to individual addresses!

This service is available both to domestic and international addresses.

**Balfour at Your Ceremony:**

Ceremony Day regalia support from an experienced Balfour team.

There is not much like the excitement of a commencement ceremony – a celebration and recognition of all of the hard work by graduates with the support of their friends and loved ones. Balfour is proud to be part of this very special day. We also know that, with all of this excitement come challenges – a lost tassel can ruin a graduate's commencement experience. It is Balfour's commitment to assist graduates on this exciting day. Balfour will have an experienced team on-site with an adequate supply of extra caps, gowns, and tassels in assorted sizes will be furnished and available for emergency use up to the time of graduation ceremonies and to include summer school graduation.

- (a) The Contractor should offer quality garments to be retained by the students (see Appendix V for the VCU collection).**

Balfour acknowledges and agrees.

- (b) Regalia shall adhere to standards established by the American Council on Education.**

Balfour acknowledges and agrees.

- (c) The regalia bundle should include a cap, gown, hood, and tassel for all degree levels.**

Balfour acknowledges and agrees.

- (d) All hoods shall show the appropriate degree color.**

Balfour acknowledges and agrees.

- (e) Tassels for graduates on the MCV Campus should show the appropriate degree color.**

Balfour acknowledges and agrees.

- (f) Doctoral gowns for students receiving a PhD, MD, DDS, Pharm D and other designated doctoral degrees shall show the appropriate degree velvet color.**

Balfour acknowledges and agrees.

- (g) The Contractor should solicit the necessary fitting and degree information from students.**

Balfour acknowledges and agrees.

- (h) At a minimum, the Contractor should support the bookstore in distributing student regalia on each campus during a mid-semester multipurpose graduation event (“Grad Fair”);**

Balfour On Your Campus:

High efficiency on-campus distribution events or working with campus retail /commencement office partners, Balfour’s clear product labeling, barcoding, and personalized packaging reduce distribution errors and make it easy for quick training of the distribution team.

During On-Site distribution events an experienced, campus dedicated Balfour team, knowledgeable in the processes and procedures of the campus, academic regalia protocol, and the product will be on-hand to oversee the process and ensure a high quality customer experience. All of the regalia is packed by degree for easy set-up and clearly labeled for easy distribution by the on-site team. Balfour’s on-site regalia management team is experienced in working with the university community to hire additional regalia service staff. All caps and gowns will be individually packaged with the matching cap, gown, hood and tassel.

Commencement Fair – provide experienced support staff member(s) to work with students and staff to distribute regalia in an accurate and efficient manner. Continue to introduce new technology to address volume and improve process.

- (i) The Contractor should supply extra apparel for last-minute orders and adjustments the day of Commencement.**

In the event of late registration, Balfour will have extra regalia available. Balfour’s guarantee is that each graduate will have a gown and the appropriate hood, stole or other commencement item; even if it means last-minute manufacturing. We will increase our inventory to match the needs of your school.

- (j) The Contractor shall provide students the option of ordering regalia over the Internet.**

Balfour acknowledges and agrees. Please reference section 3.t for complete information on Balfour’s internet ordering.

**(k) The Contractor shall provide illustrated wearing instructions with the apparel.**

Balfour acknowledges and agrees.

**(l) All regalia sold through the Contractor's ecommerce solution shall be equal to the price offered through the VCU Bookstore.**

Balfour acknowledges and agrees.

**(m) The Contractor should provide two 6' lightweight retractable signs for use at commencement to instruct students on how to properly wear regalia. Signage will be developed in conjunction with VCU Business Services but will be funded by contractor. These signs will be replaced as needed due to wear and tear or any change in regalia standards**

Balfour acknowledges and agrees.

**Describe the proposed student keeper regalia program.**

Balfour will manufacture all regalia to the specifications as set forth in the RFP.

- Balfour's UltraGreen fabric is made from 100% rPET recycled polyester fabric. This high quality matte finished fabric provides some of the best features in regalia with a look and feel that is second to none. UltraGreen was designed to beautifully display rich, deep colors, photograph beautifully and be a wrinkle-release fabric to help ensure that all graduates look their best on the day of the ceremony. Premium features such as 3" interval sizing with 2 stock plus sizes available on every size ensure a proper fit
- A hood button on the inside yoke for easy wear and comfort
- Domestic manufacturing at Balfour's Mayaguez, Puerto Rico, USA plant
- A full recycling program for unwanted gowns returned to Balfour
- Beautiful, high quality embroidery all contribute to ensuring that the VCU ceremony is as stunning as it is successful.

When VCU partners with Balfour they will experience the ultimate piece of mind in knowing that Balfour is proactively prepared every step of the way.

**Transition Team** – Balfour's Transition Team kicks off the process with a partnership between key VCU personnel, Balfour's familiar Virginia team

that has been an active part of the VCU campus for many years, and Balfour's highly experienced account transition team. Working together and meeting with various campus community members, this team will identify key dates, products and processes through which to build a custom-tailored VCU program.

**Inventory Management** – The Transition Team is in constant communication with all of Balfour's teams and will provide estimated quantities, schedules and any specialty products or requests to the manufacturing and distribution teams to make certain that Balfour has 125+% of the anticipated inventory ready to ship months in advance of the first distribution event. Having this inventory in advance leaves our manufacturing teams substantial excess capacity to produce any last minute products needed.

**Customer Service** – Balfour's customer service team is involved in the process from the RFP response, through the planning, ordering & delivery events, commencement and beyond. A dedicated customer service representative is assigned to VCU and will oversee any customer service inquiries that flow through the team. Through this process we build a knowledgeable customer service partner for VCU who can address the needs of the University accurately and efficiently.

**On-Campus Team** – Critical to the success of any program is the Balfour on-campus team that VCU has come to know. This team will be enhanced with additional support staff but continues to be led by the team that has been so impactful on the VCU campus. This knowledgeable, experienced team will continue to be the face of Balfour on the VCU campus and continue to work with the campus community to build and develop new processes to drive success.

- (n) **Provide sample apparel and manufacturing specifications for Medicine -M.D., Nursing-M.S, and Business Administration-B.S. from Virginia Commonwealth University. Include cap, gown, hood and tassel.**

Regalia samples will be personally delivered by the local Virginia Regional Manager, Mike Foltz.

- (o) **Outline the program for soliciting fitting and degree information from students for the May and December Commencements.**

Balfour employs a hybrid approach of collecting degree information to ensure that every graduate has an available gown for them.



The process all starts with Balfour's online registration program. We work with our campus partner to send out a notification to all graduates with a link that they can use to register for regalia. This system is both flexible and robust in its capabilities. We customize the system to the individual university to ensure graduates will be able to select from information that is meaningful to them. We can even go so far as to work directly with the university registrar's office to pre-populate the information so that all the graduates have to do is input their sizing information!

The second registration opportunity is at Balfour's exciting grad fairs. Utilizing electronic or simple paper registration methods graduates have a one-to-one opportunity to speak with a knowledgeable team member to as they complete their order and submit their sizing information. For graduates who do not register Balfour is ready with our bulk distribution inventory. We review the potential attendance and build a bell curve of inventory to cover robes for all of those graduates who may attend. The Balfour team is ready to immediately size graduates and fill orders as they walk up to the counter.

**(p) Describe how students will be notified about the fitting sessions and how size and degree information will be collected.**

We find the most effective notifications to be driven by the University. Balfour will work with the University to craft high-impact and exciting electronic communications across multiple platforms. This will be supported by exciting banners, yard signs and other eyecatching decorations that are custom designed for VCU. At the time of collection, our preference is to use online tools to ensure accuracy and grants us the ability to provide VCU with real time information on registrations and the graduate with a receipt.

**(q) Provide approximate key dates for both the May and December events.**

Please refer to Balfour's Marketing Plan on pages 59 - 61 for complete details.

**(r) Describe the distribution program on each campus including approximate dates.**

Balfour's commitment is to make an efficient, accurate and stress-free regalia distribution program. Through utilizing technology, sophisticated logistics and experience, Balfour gets the right gown, to the right graduate, at the right time. As the requirements for each campus are different, Balfour's practice is to meet with key individuals to formulate a plan of best serve the campus community. Below are some examples of

Balfour's programs.

### **Balfour on your Campus**

Alpha Pack Distribution: Balfour's alpha-pack distribution takes the student registrations and turns them into a single package with the all of the regalia items and the student name affixed clearly on the outside. These individual orders are packed alphabetically and delivered to VCU. This method allows for quick and accurate distribution. The graduate simply shows us their ID and order receipt and they are handed their gown.

Bulk Distribution: Balfour's bulk distribution program combines the best in large volume logistics with individual custom tailored results. A traditional system has a bulk sizing curve of regalia shipped to campus and distributed to students as needed. For many years the Balfour teams have been outfitting graduates as they come up to the counter with a series of simple questions to outfit them accurately. While this process has been proven over multiple decades, we could not help but wonder if there is a better way.

The new system is utilizing Balfour's Buildagrad program. In much the same way as a traditional bulk order the regalia is shipped in large sizing curve to campus for distribution on site to graduates. Buildagrad utilizes pre-registration to capture information and creates simple orders and packing instructions for the team. The graduate simply comes up to the counter and tells the team member their name, email or student id number and the distribution assistant can very quickly open their order on their iPad and has a complete listing of all of the graduates required products. This proven process has increased distribution accuracy and improved transaction speed! But the best part is that it tracks the process. The VCU commencement team is able to see, in real time, all of the graduate regalia information. Imagine how much we can improve the process when we know the numbers, pick-up times, peaks of distribution times, degrees with the highest pick-up rates, etc.

*The right gown... To the right student... at the right time.*

### **Balfour to your Door**

Balfour is the leader in individual shipping of regalia. We offer this option to graduates affordably with information available throughout the entire process. We are excited to say that this program was such a success at one of our partner universities that in 2017 Balfour successfully delivered

over 6,000 regalia packages to their graduate's individual homes! The process is simple, at the time of order placement the information flow begins the graduate knows when their order will ship and receives an email confirmation with all the information they need to revisit their order. When the order ships they receive the tracking information via email.

The benefit to this process is that this system was designed with a customer service focus. All of the stakeholders at VCU have access to real-time information 24 hours a day. Log-ins for the bookstore, commencement committee and key support staff are created so that they can see the same order, shipping and status information the highly trained Balfour customer service team has access to.

**(s) Explain how the firm will ensure the appropriate amount of apparel is on-hand to meet the needs of all students.**

Planning for bulk orders could not be easier with Balfour. In the fall, your representative will review past orders, estimated graduates and attendance numbers with you. Your representative will then use this information to generate a production order that is 20% larger than than your anticipated needs. This regalia will be manufactured and inventoried at Balfour's state of the art warehouse to fill spring orders.

Approximately 8 weeks prior to the first regalia event your Balfour representative will work with you to construct an initial bulk order. Once the initial bulk order is delivered, subsequent orders can be placed on an as needed basis. Having the inventory completed in our warehouse allows for immediate response to orders for additional stock. In the event that there is a need for regalia beyond the additional stock in our warehouse, or a custom sized gown is needed, Balfour's wholly owned production facility stands ready to manufacture to address needs. Orders are shipped by the the requested date and can be filled as quickly as the next business day if rush processing is required.

(t) Describe your ecommerce solution for student regalia purchasing.

**ONLINE TOOLS**  
**BUILDAGRAD** by Balfour

A proven regalia specific, online registration platform for Graduates & Faculty

Balfour Cap & Gown has designed a robust online ordering and registration tool explicitly for the regalia service market. This tool is individually customized to your school and provides a secure portal in which registrations are taken and, if desired, payments can be collected through a secure payment gateway.


A key differentiator of the Buildagrad software is its flexibility. Buildagrad is a regalia specific program that is designed to get the right gown to the right graduate easily and efficiently. Online registrations help to reduce the need for excess inventory and increase speed and accuracy during distributions. Where Buildagrad excels over the competition is that online registrations do not have to become Alpha-Packs. The flexibility of Buildagrad allow for the the creation of multiple Distribution Assistants who can view the live registration data right on the web portal. Simply enter a graduate name or student ID number and quickly pull up a summary of all of their specific products for graduation which can be pulled from a bulk shipment and packed on-site. Once you have the items for the graduate, click the button to record the pick-up and the entire commencement team has visibility of the regalia pick-up.

*Buildagrad: Easy-to-use. Flexible. Accurate.*

## Students

- Collect registrations
- Separate orders by ceremonies, schools, etc.
- Collect payments (optional)
- Ship to individual addresses
- Provide a registration list
- Provide a receipt
- Provide pick up and return instructions
- Document Regalia Pick-up or Shipment
- Upload an approved graduate list with pre-populated degree and ceremony information

**balfour** [Contact Us](#) [Log In](#)



# VCU

Welcome to the Regalia Registration Home Page for Graduating Students

**Website Opening Date:** January 1, 2017 at 10:00 a.m. (EST)

Please have your Student ID Number ready when registering for your regalia.

**COMMENCEMENT DETAILS**

Ceremony Date and Time:	TBA
Ceremony Location:	TBA

**PRICES**

(TAX added per item)

We accept credit cards for online payment (Visa, Mastercard, American Express, Discover, JCB, Diners Club).

Rental Prices	Purchase Prices
TBA	TBA
TBA	TBA

**ORDER CONFIRMATION DETAILS**

You will receive two emails once your rental/purchase is complete.

The first will be from Antwear. This contains payment information.

The second will be from Balfour Grad. This confirmation contains all the necessary details regarding your order information and amount and if applicable, cancellation and refund information. Your Order ID number will be in this order confirmation.

Please print these forms or bring them on your mobile device if you are having your regalia shipped to your school or graduation location as proof of payment when picking up your regalia.

**balfour** [Contact Us](#) [Log In](#)

[Student New Hampshire University](#) > [Spring Commencement 2017](#) > [Step-By-Step](#) > [Graduate Information](#)

**Graduate Information** [Save & Continue](#)


\* All fields with asterisks are required

First Name *	Mobile Name (Optional)
Southern	104
Last Name *	Student ID Number (do not enter spaces or dashes) *
University	graduate2017
Email *	Phone (Optional)
2017grad@balfour.edu	(800) 888-8800
Height * (Without Shoes)	Weight *
5' 0" - 6' 2" (152.40 cm - 187.48 cm)	140 lbs - 185 lbs (63.50 kg - 74.84 kg)
Select Ceremony: *	Select a Degree or Program: *
88th Commencement Saturday, May 13, 2017 at 3:00 *	Associate of Science

[Save & Continue](#)

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[Student New Hampshire University](#) > [Spring Commencement 2017](#) > [Step-By-Step](#) > [Graduate Information](#)

**Graduate Information** [Save & Continue](#)

\* All fields with asterisks are required

First Name *	Mobile Name (Optional)
Southern	None Hampshire
Last Name *	Student ID Number (do not enter spaces or dashes) *
University	graduate2017
Email *	Phone (Optional)
2017grad@balfour.edu	(800) 888-8800
Height * (Without Shoes)	Weight *
5' 0" - 6' 11" (152.40 cm - 192.34 cm)	140 lbs - 185 lbs (63.50 kg - 74.84 kg)
Select Ceremony: *	Select a Degree or Program: *
88th Commencement Saturday, May 13, 2017 at 3:00 *	Master of Science

**Shipping Address**

Address \*

2500 North River Road

City \*

Provincetown \*

Manchester

New Hampshire

Country \*

United States


Postal/Zip Code \*

03108

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2016-10-28

## Faculty

- Collect registrations
- Collect payments (optional)
- Ship to individual addresses
- Provide a registration list
- Provide a receipt
- Provide pick up and return instruction
- Document Regalia Pick-up or Shipment

The screenshot shows the 'balfour' logo in the top left and 'Contact Us' and 'Logout' links in the top right. The main header features the VCU logo and the text 'Welcome to the Faculty Regalia Registration Home Page'. Below this, a red banner states the 'Website Opening Date: January 1, 2017 at 10:00 a.m. (EST) to April 14, 2017 at 5:30 p.m. (EST)'. The page is divided into three main sections: 'COMMENCEMENT DETAILS', 'PRICES', and 'ORDERING DETAILS'. The 'COMMENCEMENT DETAILS' section includes information about the 10th Commencement of Southern New Hampshire University. The 'PRICES' section lists 'Rental Prices' and states 'There is no charge for rental'. The 'ORDERING DETAILS' section includes 'Pick-Up Instructions' and 'Drop-Off Instructions'.

The screenshot shows the 'balfour' logo in the top left and 'Contact Us' and 'Logout' links in the top right. The main header features the 'Faculty Registration' title and a 'Finished' button. Below this, a red banner states 'Fill in the required fields'. The form is divided into several sections: 'Professor Southern New Hampshire', 'Select Ceremony', 'What degree do you hold?', 'Pick your package:', and 'Institution information (The institution you received your degree from:)'. Each section contains various input fields for personal and professional information.

## Sample Online Registration Sites:

For demonstration purposes sample online registration pages have been developed for Towson University. These pages will be customized and updated with products and information specific to the University.

Students: <https://buildagrad.com/VCU>  
Faculty: <https://buildagrad.com/VCUfaculty>

## Administrative BUILDAGRAD Dashboard:

Balfour is very proud of its administrative dashboard for BUILDAGRAD. This interface was designed to securely allow multiple authorized users the ability to search, view and update pertinent data in real time.



Key features include:

Quickly search data by Name, Order Number or Student ID

View individual registration status and receipts

On-campus pick-up recording

Tracking information for shipped & delivered regalia

Ability to view live registration data

Ability to download detailed registration data in both Excel and CSV formats

#### STEP 1. Add Distribution Assistant Role On Build A Grad

- A new role, “Distribution Assistant” will be created. This new role will have similar access as the School Administrator along with the new permission of recording the pick-up information of completed orders. More than one Distribution Assistant may be assigned per school account on Build A Grad.

Dashboard > U.S. Test School - One Degree Only > Add School Admin

### U.S. Test School - One Degree Only School Admin

Email address

Password

Confirm password

Account Permissions

☐ ReadOnly ☒ RecordPickUp

STEP 2. Once a Distribution Assistant is added to the Build A Grad school account, this person will be able to search for a completed order and record the pick-up status and information by clicking the “+” button on the order row selected.



Student Registrations [7/9]

Download Completed Orders

Download Incomplete Orders

Add Student

Upload Student List

Order #	Student #	Last Name	First Name	Status	Rental/Purchase Id	Record Pick-Up	Delete	Edit
	12350	Malga	Justine	Incomplete				
	12354	Suilon	Indras	Incomplete				
<a href="#">191460</a>	1185	Registrant	First	Completed	2EE01			
<a href="#">191465</a>	12353	Babovsky	Alexandra	Completed	2EE06			
<a href="#">191461</a>	12349	Lloyd	Karen	Completed	2EE02			
<a href="#">191462</a>	12347	Gibson	Wesley	Completed	2EE03			
<a href="#">191464</a>	12351	Basch	Susan	Completed	2EE05			
<a href="#">191466</a>	12355	Trumk	Donald	Completed	2EE07			
<a href="#">191463</a>	12356	Hekle	Ben	Completed	2EE04			

Show

10

entries

First

Previous

Next

Last

The “+” button is only available for “Completed” order status.

Once the “+” button is clicked, a new window will pop-up and the Distribution Assistant will be able to record the pick-up status and information of the completed order.

#### Record Pick-Up Fields:

- **Order Number:** The completed order number will be displayed to make sure the Distribution Assistant is recording the pick-up status of the correct selected order.
- **Pick-Up Date:** Required field. The order’s pick-up date will need to be selected. The calendar will display the current date and time. The Distribution Assistant may change or select the correct date and time of when the order’s been picked up.
- **Picked-Up By:** Required field. The Distribution Assistant may enter the name of the person who picked-up the order.
- **Pick-Up Location:** Required field. Select either “School”, “Bookstore”, or “Other” for where the order’s been picked-up. If “Other” is selected, a free-form textbox will be displayed and the Distribution Assistant may enter the actual location of where the order’s been picked up if it wasn’t picked up at the School or at the Bookstore. The textbox may not be blank if “Other” is selected.

Click “Save” to record the order’s pick-up information.

### Student Registrations [1/10]

Download Completed Orders
Download Incomplete Orders
Add Student
Upload Student List

Order #	Student #	Last Name	First Name	Status	Rental/Purchase Id	Record Pick-Up	Delete	Edit
		Babovsky	Alexandra	Incomplete				
		Basch	Susan	Incomplete				
		Carter						
		Hekle						
		Kolsky						
		Lloyd						
		Malga						
		Suilon						
		Trunk						
191468	1185	Gibson	Wesley					

Show 10 entries

Order Number: 191468  
Pick-Up Date: Wed October 19, 2016 11:49 AM  
Picked-Up By:  
Pick-Up Location:

October 2016

Time 11 : 49 AM

### Student Registrations [12/12]

Download Completed Orders
Download Incomplete Orders

Order #	Student #	Last Name	First Name	Status	Rental/Purchase Id	Record Pick-Up	Delete	Edit
191233	1117	REgistrant	First	Completed	2ED1E			
191235	1119	Registrant	Second	Completed	2ED20			
191260	1123	testing						
191262	1125	testing						
191452	1178	Registra						
191453	1179	Registra						
191454	1180	Registra						
191455	1181	Registra						
191456	1182	Registra						
191457	1183	Registra						

Show 10 entries

Order Number: 191233  
Pick-Up Date: Wed October 12, 2016 10:56 am  
Picked-Up By: Anna Smith  
Pick-Up Location:

School  
Bookstore  
Other

123 Main Street

Save

Validations will be added to make sure the required fields have values when the “Save” button is clicked.

Order Number: 191460

Pick-Up Date:

Picked-Up By:

Pick-Up Location: ☐ School ☐ Bookstore ☐ Other

- Please enter the Pick Up Date
- Please enter a name for Picked-Up By
- Please select a Pick Up Location

In case of errors, the Distribution Assistant may select an order and update the pick-up information by clicking the “Edit” button or clicking the “Delete Record” button if the information was recorded on the incorrect order.

Click the “X” on the pop-up window to cancel.

Order Number: 191465

Pick-Up Date: Wed October 19, 2016 10:37 AM

Picked-Up By: Lynch

Pick-Up Location: ☐ School ☐ Bookstore ☒ Other

Once the pick-up information is added, edited or deleted, a message will be displayed on top of the page. Please see sample messages below.

Successfully added the pick up record on Order Number: 191465

Successfully deleted the pick up record for Order Number: 191465

### STEP 3. Display the order's pick-up status on the Complete Order page.

Once the completed order has been picked-up and the pick-up information has been recorded by the Distribution Assistant, the information will be displayed on the "Order Complete" page, under the "Order Pick-Up Information" section (Please see the red box on the image below for reference). If there's no recorded pick-up information, the Order Complete page will not display this section.

## Order Complete

[print this page](#)

Your order is complete. You can find the details below.

This is your order confirmation. A copy of this order confirmation was also sent to your email address and you should receive it within 24 hours after submitting the order.

For Ship-To-School Orders: Please print or bring this form on your mobile device when picking up your order.

Order Date: October 19, 2016 - 11:26 (Central Standard Time)  
Order: CAO191468  
Rental ID: 2EED9  
Name: Wesley Gibson  
Email: wgibson@utc.edu  
Phone: (204) 123-4564  
Height: 5'0" - 5'2" (152.40 cm - 157.48 cm)  
Weight: 115 lbs - 140 lbs (52.16 Kg - 63.50 Kg)

Please select your tam size: AYY  
Please select your tam size S: bvw

### Order Details

Bachelor of Humanity	Ceremony: Package Item(s): Price: Ceremony Location: Pick-Up Instruction: Drop-Off Instruction (Rental Orders Only):	Sun, Dec 25, 2016 - 11:10 AM Bachelor \$0.00 (Rental) test test test
Master of Journalism	Ceremony: Package Item(s): Price: Ceremony Location: Pick-Up Instruction: Drop-Off Instruction (Rental Orders Only):	Sun, Dec 25, 2016 - 11:10 AM Master \$11.00 (Rental) test test test

#### Order Pick-Up Information

Picked-Up By: Kappa Meister  
Pick-Up Date: Wed Oct 19, 2016 11:49 AM  
Pick-Up Location: Bookstore

Registrations must be cancelled or changed before: Wed, Dec 14, 2016 - 11:05 AM (Central Standard Time)

### Totals

Subtotal	\$11.00
Shipping	\$25.00
GST	\$0.55
PST	\$0.88
Total	\$37.43

### Payments

Date Received	Amount	Paid By
19/10/2016 11:48:59 AM	\$37.43	Wesley
Total Paid	\$37.43	
Outstanding	\$0.00	

[Back To Homepage](#)



STEP 4. Display the order's shipping's tracking link on the Order Complete page.

Once the order's been shipped directly to the student or faculty, Build A Grad will schedule a daily retrieval of any existing tracking information link from the shipping company. This tracking link will be displayed on the "Order Complete" page under the "Shipping Status" section (similar to the Order Pick-Up Information section) of the page (Please see the red box on the image below for reference). If the completed order has not been shipped yet or the order does not yet have the tracking information link, the section will not be displayed on the page.

Once the tracking link's clicked, it will direct the student or faculty to the shipping company's website displaying the shipping status of their order.

**Order Complete** [print this page](#)

Your order is complete. You can find the details below.

This is your order confirmation. A copy of this order confirmation was also sent to your email address and you should receive it within 24 hours after submitting the order.

For Ship-To-School Orders: Please print or bring this form on your mobile device when picking up your order.

Order Date: October 19, 2016 - 11:26 (Central Standard Time)  
Order: CAO191466  
Rental ID: 2EE09  
Name: Wesley Gibson  
Email: wgibson@utc.edu  
Phone: (204) 123-4564  
Height: 5'0" - 5'2" (152.40 cm - 157.48 cm)  
Weight: 115 lbs - 140 lbs (52.16 Kg - 63.50 Kg)

Please select your tam size:   
Please select your tam size S:

**Order Details**

Bachelor of Humanity	Ceremony: Package Item(s): Price: Ceremony Location: Pick-Up Instruction: Drop-Off Instruction (Rental Orders Only):	Sun, Dec 25, 2016 - 11:10 AM Bachelor \$0.00 (Rental) test test test
Master of Journalism	Ceremony: Package Item(s): Price: Ceremony Location: Pick-Up Instruction: Drop-Off Instruction (Rental Orders Only):	Sun, Dec 25, 2016 - 11:10 AM Master \$11.00 (Rental) test test test

**Order Pick-Up Information**

Picked-Up By: Kappa Meister  
Pick-Up Date: Wed Oct 19, 2016 11:49 AM  
Pick-Up Location: Bookstore

Registrations must be cancelled or changed before: Wed, Dec 14, 2016 - 11:05 AM (Central Standard Time)

**Totals**

Subtotal	\$11.00
Shipping	\$25.00
GST	\$0.55
PST	\$0.88
Total	\$37.43

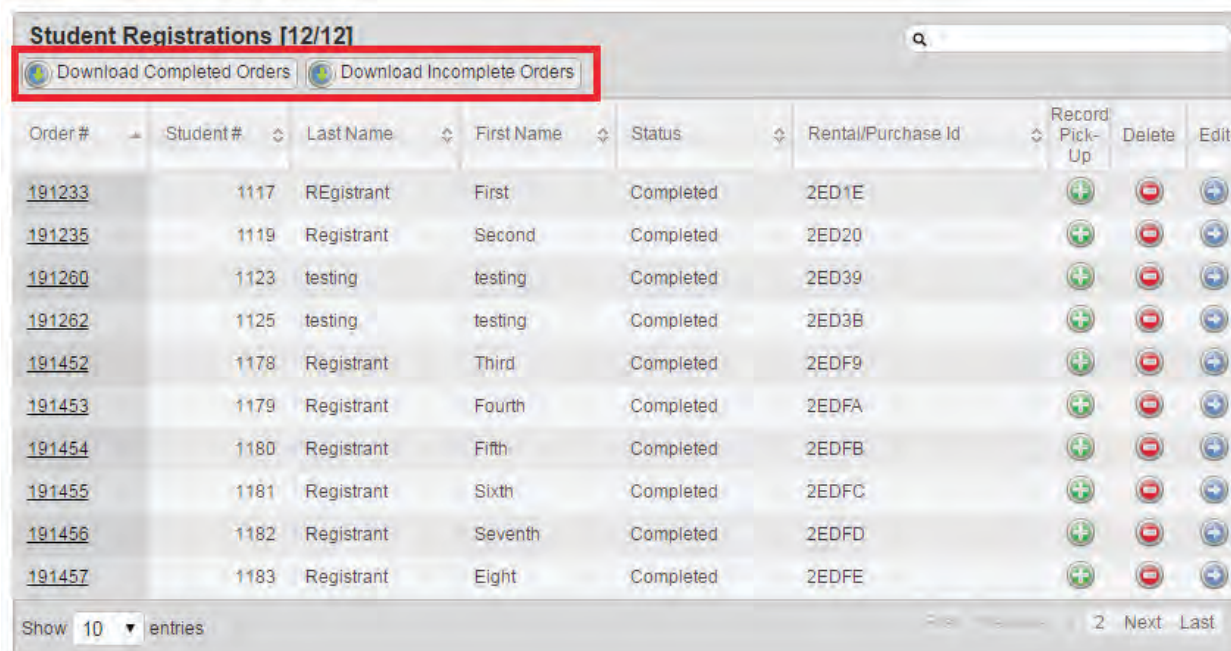
**Payments**

Date Received	Amount	Paid By
12/10/2016 11:45:50 AM	\$37.43	Wesley
Total Paid	\$37.43	
Outstanding	\$0.00	

[Back To Homepage](#)

## STEP 5. Download Order Reports.

On either the Student Registrations or Faculty Registrations table, assigned School Administrators or Distribution Assistants may download either completed or incomplete orders on a .csv file when they log in on Build A Grad. The pick-up information and the tracking information link, if present, will be added to the completed orders .csv file. (Please see image below for reference).



Order #	Student #	Last Name	First Name	Status	Rental/Purchase Id	Record Pick-Up	Delete	Edit
<a href="#">191233</a>	1117	Registrant	First	Completed	2ED1E			
<a href="#">191235</a>	1119	Registrant	Second	Completed	2ED20			
<a href="#">191260</a>	1123	testing	testing	Completed	2ED39			
<a href="#">191262</a>	1125	testing	testing	Completed	2ED3B			
<a href="#">191452</a>	1178	Registrant	Third	Completed	2EDF9			
<a href="#">191453</a>	1179	Registrant	Fourth	Completed	2EDFA			
<a href="#">191454</a>	1180	Registrant	Fifth	Completed	2EDFB			
<a href="#">191455</a>	1181	Registrant	Sixth	Completed	2EDFC			
<a href="#">191456</a>	1182	Registrant	Seventh	Completed	2EDFD			
<a href="#">191457</a>	1183	Registrant	Eight	Completed	2EDFE			

Show 10 entries

- (u) **Provide a sample of illustrated instructional information provided to customers about wearing the regalia.**

Balfour acknowledges and agrees. Please refer to Section VII for an example of the instructional flyer as well as the hard copy sample included with the RFP.

- (v) **Confirm that contractor will fully fund and contribute to the design of two pop-up informational signs for use during commencement to assist students with the proper wearing of regalia.**

Balfour acknowledges and agrees. Please refer to Section VII for an example of the informational sign as well as the hard copy sample included with the RFP.

- (w) **Complete Pricing Schedule (Appendix III – Regalia – Announcements tab). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.**

Pricing Schedule included as attachment in Section IV of the document.

- b) **The Contractor should provide the University with a program for the solicitation, distribution and collection of high quality rental regalia for faculty, staff and others upon request, to be sold through the VCU Bookstore.**

Commencement should be an uplifting, colorful and inspiring experience for graduates, their families and the academic community as a whole. To meet all these expectations, every detail has to be executed with care and perfection. One essential detail is outfitting your faculty and staff in academically-correct, beautifully- fitted regalia. When done right, your faculty regalia brings dignity and elegance to the commencement ceremony, and a sense of pride and inspiration to your graduates.

Balfour makes outfitting your faculty a convenient and pleasurable experience. We start by providing access to our easy-to-use online portal which allows faculty to specify their exact regalia needs. Here they click and select their choices from your authorized assortment of academically-correct options. Every color and detail of your faculty regalia will meet the specifications of the American Council on Education's Academic Costume Code.

When shipped, each faculty order will be carefully packaged and then labeled with the name of each recipient for easy distribution on-campus. Faculty may choose shipment to their home if they prefer.

With Balfour, you can be certain your faculty will look their absolute best at graduation and proudly represent both your university and their alma mater with beautifully crafted regalia.

At Balfour we feel that the conclusion of the ceremony should be just as uplifting and exciting as the events leading up to it. This is why Balfour made the investment in building an industry exclusive return management system. All of Balfour's rental regalia is barcoded so returns are fast, easy and accurate. No more checking off names on lists, no more bills for missing returns, no more stress! Our team will assist in the collection of regalia and it will be checked in at Balfour's return facility. In the event that an outfit is missing, Balfour will contact the faculty member directly and provide them with return instructions.

Standard academic regalia will be provided per The Academic Costume Code and Ceremony Guide.

- Gown shall be black in color trimmed appropriate velvet panels and bars or embellishments
- Hood colors are based on discipline and will be lined appropriate to the degree and conferring institution.



- Academic cap will be a traditional mortarboard or soft academic tam black in color and available in multiple adjustable size ranges.
- Gown should be lightweight and comfortable for late spring outdoor and indoor activities.
- Balfour will stock ample regalia to outfit all potential faculty, staff and guests
- Pre-Packaged regalia delivered with recipient name for distribution
- Delivery on hangers available
- Balfour will offer special pricing discount for faculty/staff wishing to purchase regalia

**(a) The Contractor should offer quality rental garments for faculty.**

Balfour acknowledges and agrees.

**(b) All hoods shall show the appropriate degree color.**

Balfour acknowledges and agrees.

**(c) The Contractor should support the University retail stores in soliciting the necessary fitting and degree information from faculty.**

Balfour acknowledges and agrees.

**(d) Each rental order should be custom packed showing the customer's name;**

Balfour acknowledges and agrees.

**(e) The Contractor shall supply extra apparel for last-minute orders and adjustments the day of Commencement.**

Balfour acknowledges and agrees.

**(f) The Contractor should provide the option of ordering faculty and staff regalia using the Internet.**

Balfour acknowledges and agrees. Please reference section 3.t for complete information on Balfour's internet ordering.

**(g) The bookstore shall not be required to pay for rental apparel that was not used.**

Balfour acknowledges and agrees.

Making sure that every student has the correct regalia available for them is vital to the success of any regalia program. Having extra regalia on-hand makes the process quicker, easier and improves the customer experience. We want to

be certain that you have enough regalia to address the needs of your campus without it being a financial burden for the store. It is for this reason that we issue full credit on all unused student souvenir regalia. No restocking fees, no hidden charges, no gimmicks. Simply return any unused regalia within 30 days following your University's ceremony for full-credit.

**(h) The Contractor should provide wearing instructions with the apparel.**

Balfour acknowledges and agrees.

**(i) The Contractor shall provide rental regalia for the Platform Party, not to exceed an average of 25 per semester over the length of the contract. The average of individuals included in this grouping for the previous two years has been 14. These items shall be pressed, placed in individual garment bags, and clearly labelled with the name of the individual, contents of the bag, and initials of the manager who verified the contents. This regalia will be delivered in person by a manager and checked in with the VCU Bookstore's General Merchandise Manager or other individual specified by the University. Names, heights, degrees, disciplines and institutions will be provided by the VCU Bookstore.**

Balfour acknowledges and agrees.

**(j) The contractor shall provide up to six complimentary "extra" sets of rental regalia and tams each semester, at the request of the VCU Bookstore, to be on hand in the event of last-minute changes or issues with Platform Party regalia (this includes members of the VCU Board of Visitors who have keeper regalia).**

Balfour acknowledges and agrees.

**Describe the proposed faculty rental regalia program.**

Balfour is a leader in providing high quality regalia for faculty in the most efficient and easy process. This all starts with Balfour's industry leading online registration system. This system collects the important information to guarantee that each faculty member receives the correct regalia for their institution. We then export this information and create orders to meet the needs of VCU. Faculty members can have it shipped to the Bookstore, where it arrives in one package with their name clearly affixed to the package, OR through partnering with mail services it can be shipped as a group to individual departments around the various campuses, OR they can select an individual shipping method in which they have the regalia shipped to their home or off-campus office.

In our continued quest to make the process even easier Balfour has addressed it by building an industry leading return system. A quick look at Balfour's rental regalia reveals a barcoded label on the inside. At the time of the order creation the product is assigned to the individual faculty member so all they have to

do for returns is drop it in the return bin and send it back to Balfour. No more checking in regalia, no more finding names on lists, no more follow-up searching for unreturned regalia. In the event that a gown is not included with the returns a simple email or phone call from our customer service team goes out to inform the faculty member how they can return their regalia. *Simple. Easy. Accurate.*

**(a) Provide sample apparel for a PhD from Virginia Commonwealth University.**

**Include cap, gown, hood and tassel.**

Regalia samples will be personally delivered by the local Virginia Regional Manager, Mike Foltz.

**(b) Outline the program for soliciting fitting, school and degree information for the May and December commencements.**

To ensure the highest rates of both customer satisfaction and success, we employ our 3 proven best practices, putting emphasis on the right processes for YOUR campus and supporting this initiative with the other two.

All of Balfour's processes are set-up to collect information that is pertinent to ensuring that every faculty receives the correct regalia for the institution which conferred their highest degree.

**On-Line Registration:** Approximately 8 to 12 weeks prior to the requested delivery date, Balfour will open a customized, dedicated VCU Faculty online registration page for registration. A sample site has been created for your review: <https://buildagrad.com/VCUfaculty>

**On-Site Registration:** During on campus events, Balfour will be able to collect faculty registrations through a simple easy-to-use paper form. This information is then submitted to our Order Entry team and added to the main faculty regalia order.

**Group Registration:** It is common for some departments to have the practice of group registration. Our Order Entry team will work directly with a group contact to verify the provided information and add these orders to the main faculty regalia order.

**(c) Provide approximate cut-off dates for faculty and staff rental for the May and December ceremony.**

Main Orders:	4-6 Weeks prior to requested delivery date
Add Order:	#1 4-Weeks prior to Commencement
	#2 2-Weeks prior to Commencement
Late-Adds:	Filled as needed until commencement day

**(d) Describe how each rental order will be packed for distribution.**

Rental orders are packaged folded in a single package including the entire regalia set with the recipient name clearly affixed to the outside of the package. Regalia is shipped to the campus alphabetized by last name.

**(e) Describe the distribution program on each campus including key delivery dates and how individual orders will be shipped.**

Balfour's team will meet with key campus personnel to develop a plan that best suits the needs of the campus. Balfour has utilized such distribution strategies as: hosting regalia distribution events, shipping regalia to individual departments or addresses, partnering with campus mail-services and even providing hanger delivery for pick-up on the day of the ceremony. Balfour finds the best delivery period to be 1 – 3 weeks prior to the ceremony.

**(f) Explain how the firm will ensure the appropriate amount of apparel is on-hand to meet the needs of faculty and staff, including how last-minute requests will be satisfied.**

Balfour's faculty rental program is supported by over 100 years of experience in outfitting faculty. Upon adding regalia services for VCU, Balfour will increase its faculty rental inventory with 125% of the anticipated regalia requirement to ensure that all faculty members receive proper regalia and extra regalia is available to fill last-minute orders. In the event that a special size robe, hood or other item is needed, Balfour's wholly owned and operated US and Canadian manufacturing facilities stand ready for immediate production.

**(g) Describe how the Internet will be used for faculty and staff ordering.**

Please reference section 3.t for complete information on Balfour's internet ordering.

**(h) Confirm that the firm will provide additional verifications of all VIP regalia orders for commencement, to include pre-shipping and post-receipt on-site review of orders at the University's sole discretion;**

Balfour acknowledges and agrees.

**c) The University and the retail stores shall not be responsible for uncollected apparel.**

Balfour acknowledges and agrees.

- d) **The Contractor shall offer commemorative sashes for student marshals. Provide a sample of the proposed approach and discuss any available options. State the price per unit for your proposal.**

Balfour's custom sashes offer the finest quality and workmanship. Traditional marshal designs are gold in color with the school seal embroidered on one side and "Student Marshal" with the year embroidered on the other. Stoles are offered in a variety of colors and different types of artwork has been used to celebrate the ceremony and recognize the volunteers. Balfour will provide up to 15 student marshal stoles annually at no charge for the duration of Balfour's regalia contract – a \$375 value!

- e) **The Contractor should offer high quality custom apparel for purchase by customers. Provide a sample of your most popular custom-tailored PhD cap, gown, hood and tassel. Provide a plan to market custom regalia to the faculty and include a brochure and pricelist for custom apparel.**

Balfour is offering the VCU Store an everyday discounted wholesale price of 25% off MSRP on custom faculty regalia purchases.

To enhance the appeal of ordering during special scheduled bi-annual faculty ordering regalia fairs, Balfour is prepared to increase the VCU Store discounted wholesale price to 30% off MSRP.

The low wholesale price is structured allow for a annual discount of around 5% off Balfour's already competitive MSRP to all VCU faculty and staff members every day of the year.

To enhance the appeal of ordering during special scheduled bi-annual faculty ordering regalia fairs, Balfour is prepared to offer an additional 6.5% off of Wholesale pricing of faculty & staff regalia purchases in hopes of a partnership in which the store will match this discount to offer faculty & staff a total discount of an additional 10% off of faculty regalia purchase orders placed during this event.

- f) **The Contractor should promote and market the regalia program.**

**Acknowledge and agree.**

Balfour acknowledges and agrees.

- g) **Complete Pricing Schedule (attached Excel document). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.**

Balfour acknowledges and agrees.

- h) The University reserves the right to request modification to regalia specifications.**

Balfour acknowledges and agrees.

- i) VCU marks and logos are registered with government agencies and currently licensed through the Collegiate Licensing Company (CLC). Regalia prices shall include all applicable licensing fees. The current CLC licensing rate is 12% per unit and may change periodically. Contractor will receive notice from CLC of any licensing fee changes. The University reserves the right to change Licensing Vendors and will provide notice of said change at its earliest convenience. The contractor shall comply with any Licensing vendor change requirements and University Trademarks and Licensing Policies.**

Balfour acknowledges and agrees.







2920 North 2nd Street  
Minneapolis, MN 55411  
p. 800-370-0931 | f. 612-333-6165  
e. gowndorders@balfour.com

## Finest Quality Academic Regalia Order Form

P.O. #: \_\_\_\_\_

**ALLOW 5 WEEKS FOR DELIVERY**

**TODAY'S**

**DATE:**

**NEED BY**

**DATE:**

Please allow 4 weeks for production of custom items and up to 1 week for transit time depending on location. Balfour guarantees all of its products to be free of manufacturer defects, and at its sole discretion will repair or replace any defective item. Returns are not accepted on custom products. Additional charge for expedited and international shipping.

**Prices Valid through August 31, 2018**

20-083118

### Customer Information

Name \_\_\_\_\_ Representative \_\_\_\_\_  
Address \_\_\_\_\_ Ship To: ☐ Bookstore | ☐ Customer  
Address 2 \_\_\_\_\_ Store Name \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ College/University \_\_\_\_\_  
Contact Person \_\_\_\_\_  
Phone \_\_\_\_\_ Phone \_\_\_\_\_  
Email \_\_\_\_\_ Email \_\_\_\_\_

**SAMPLE**  
Faculty Regalia  
Purchase order form -  
List Prices displayed.

	✓	PRICE
<b>Bachelor Gown</b> - Black Pilgrim Fabric		\$ 120.00
<b>Bachelor Hood</b> - Black Pilgrim Fabric shell with satin lining and degree velvet		\$ 75.00
<b>Master Gown</b> - Black Pilgrim Fabric		\$ 150.00
<b>Master Hood</b> - Black Pilgrim Fabric shell with satin lining and degree velvet		\$ 95.00
<b>Exeter Doctor Gown</b> - Black Pilgrim fabric with Black Velvet		\$ 179.00
<b>Andover Doctoral Gown</b> - Black Pilgrim fabric with Black Deluxe Velvet		\$ 229.00
1) Silk Velvet: <input type="checkbox"/> Black   <input type="checkbox"/> Ph.D. - or - Add:		\$ 64.00
Deluxe Velvet: (other than black)   <input type="checkbox"/> Ph.D.   <input type="checkbox"/> Other Add:		\$ 24.00
2) Piping: <input type="checkbox"/> Antique Gold   <input type="checkbox"/> Bright Gold   <input type="checkbox"/> Other Add:		\$ 72.00
3) Fabric Color: (other than Black)   <input type="checkbox"/> Add:		\$ 68.00
<b>Deluxe Doctoral Gown</b> - Black Pilgrim fabric with Black Deluxe Velvet		\$ 349.00
1) Silk Velvet: <input type="checkbox"/> Black   <input type="checkbox"/> Ph.D. - or - Add:		\$ 64.00
Deluxe Velvet: (other than black)   <input type="checkbox"/> Ph.D.   <input type="checkbox"/> Other Add:		\$ 24.00
2) Piping: <input type="checkbox"/> Antique Gold   <input type="checkbox"/> Bright Gold   <input type="checkbox"/> Other Add:		\$ 72.00
3) Fabric Color: (other than Black)   <input type="checkbox"/> Add:		\$ 68.00
4) Add On: <input type="checkbox"/> Cuffed Sleeves Add:		\$ 72.00
<b>Oxford Doctoral Gown</b>		
1) Silk Velvet: <input type="checkbox"/> Black   <input type="checkbox"/> Ph.D. - or -		
Deluxe Velvet: <input type="checkbox"/> Black   <input type="checkbox"/> Ph.D.   <input type="checkbox"/> Other <input type="checkbox"/>		\$ 699.00
2) Piping: <input type="checkbox"/> Antique Gold   <input type="checkbox"/> Bright Gold   <input type="checkbox"/> Other		
3) Fabric: <input type="checkbox"/> Pilgrim   <input type="checkbox"/> Lyric		
4) Fabric Color: <input type="checkbox"/> Black   <input type="checkbox"/> Other		
<b>Doctoral Hood</b> - Satin lining and degree velvet. Shell is Black Pilgrim or matches robe.		\$ 115.00
<b>Mortarboard</b> - Traditional Style mortarboard with rayon tassel		\$ 15.00
<b>Mortarboard</b> - Deluxe with padded crown and rayon tassel		\$ 35.00
<b>Doctoral Tam Standard</b> - Adj. Size, Black Velvet with rayon tassel		\$ 60.00
<b>Doctoral Tam Deluxe</b> - Adj. Size, Black Velvet with Gold Metallic Tassel		\$ 100.00
<b>Doctoral Tam Custom</b> - Adjustable Size, Silk or Colored Velvet with <input type="checkbox"/> Gold -or- <input type="checkbox"/> Silver Metallic Tassel <input type="checkbox"/>		\$ 125.00
Silk Velvet: <input type="checkbox"/> Black   <input type="checkbox"/> Ph.D. - or - <input type="checkbox"/> Colored Velvet: _____		
<b>Garment Bag</b>		\$ 15.00
<b>SUBTOTAL</b>		
<b>State Tax ( _____ %)</b>		
<b>Shipping &amp; Handling</b>		\$ 15.00
<b>TOTAL</b>		

### MEASUREMENTS

(See Measuring Instructions for Additional Information)

HEIGHT \_\_\_\_\_ FT \_\_\_\_\_ IN

WEIGHT \_\_\_\_\_ LBS

CHEST \_\_\_\_\_ IN

JACKET SIZE \_\_\_\_\_

SHIRT/BLOUSE \_\_\_\_\_

SLEEVE LENGTH \_\_\_\_\_ IN

WRIST CIRCUM. \_\_\_\_\_ IN

CAP/TAM SIZE \_\_\_\_\_ IN

### DOCTORAL TAM INFORMATION

TAM STYLE

(No. of Corners) ☐ 8 ☐ 6 ☐ 4

ADJUSTABLE TAM ☐ S/M ☐ M/L ☐ XL

SIZING 6 1/2 - 7 1/8 7 1/8 - 7 5/8 7 3/4 - 8 1/8

Head Circum. 20" - 22 1/2" 22 1/2" - 24" 24" +

### DEGREE INFORMATION (Please be specific)

☐ Ph.D.

☐ Other \_\_\_\_\_

### INSTITUTION (Including City, State)

Specify colors for non-U.S. Institutions

X

**CUSTOMER SIGNATURE**

NAME ON CARD: \_\_\_\_\_

CARD NUMBER: \_\_\_\_\_ EXP DATE: \_\_\_\_\_ / \_\_\_\_\_

BILLING ZIP CODE: \_\_\_\_\_ CSC: \_\_\_\_\_ (SECURITY CODE)

Credit Card to be processed by: ☐ Booksore -or- ☐ Balfour

CARDHOLDER SIGNATURE

WE BELIEVE IN TRADITION

## CUSTOM REGALIA

QUALITY REGALIA FOR GRADUATES & FACULTY

### FINEST QUALITY CUSTOM REGALIA

For nearly a century, our custom regalia has been worn by graduates and faculty with pride. All of the gowns in Balfour's custom line offer full fluting over the shoulders, broad, rich velvet panels and doctoral bars, distinctive front pleated panels and zipper closure. From our full-custom hand finished Oxford gown to our traditional and economical offerings, our product line is defined by high-quality craftsmanship, beautiful and durable fabrics, and authentic, academically appropriate designs.

#### THE OXFORD

Tailored on a traditional pattern the Oxford gown represents the finest quality in craftsmanship, fabric and features; with lined bell sleeves, cuffs and buttons. The Oxford gown offers the wearer complete choice of the very finest black or popular degree color silk velvets, all carefully straight stitched in place and elegantly trimmed in gold metallic, silver metallic or degree specific piping.



#### THE DELUXE

Our premium doctoral gown. Traditional style pleats, fully-lined sleeves, a deluxe button and braided cord on the back with zipper front closure give this hand-crafted and custom-tailored outfit a distinctive appearance. Rich velvet doctoral bars on each sleeve with velvet panels down the front of the gown add to the superior look of this gown.



#### THE ANDOVER

Our fine quality doctoral gown at a value price. Open sleeves, a deluxe button and braided cord on the back with zipper front closure give this hand-crafted and semi-custom-tailored outfit a distinctive appearance. Rich velvet doctoral bars on each sleeve with velvet panels down the front of the gown add to the superior look of this gown.



#### THE EXETER

Our economical quality doctoral gown at a budget price. Open sleeves, relaxed fluting over the shoulders and around the back of the yoke with zipper front closure give this hand-crafted and semi-custom-tailored outfit a distinctive appearance. Velvet doctoral bars on each sleeve with velvet panels down the front of the gown add to the superior look of this gown.



#### **4. Announcements and Stationery:**

- a) **The Contractor should provide a comprehensive program of standard and personalized graduation announcements and the accompanying stationery including thank you cards, name cards, etc. The Contractor should offer announcements for both the May and December Commencement ceremonies.**

**Describe the graduation announcement and stationery program proposed.**

Balfour is committed to producing the highest quality graduation announcements for Virginia Commonwealth University. Announcement orders are carefully completed to accurately reflect the specifications of the individual school and student ordering. Our announcement programs are designed to be flexible and responsive to the needs of our customers.

#### **Balfour College Graduation Announcements**

Following is detailed information on the quality of Balfour's printing; type and weight of paper(s) utilized; printing method and type of inks, exact size of the pieces.

#### **Design and Development**

An experienced artist from our graphics department designs and assists with die proofs for each school's customized announcements. We maintain a large portfolio of etchings and embossings to meet a variety of design needs.

#### **Product Descriptions**

##### **Announcements**

Personalized announcement with custom school crest offered printed on #80 text weight paper or 65# card weight paper. Beginning in Fall 2012, in addition to our traditional line of Personalized College Announcements, Balfour is thrilled to offer a new Photo Announcement Series as well.

##### **Thank You notes**

Thank You notes offered with custom school crest printed on 65# card weight paper

##### **Note cards**

Note Cards offered with custom school crest printed on 65# card weight paper

##### **Embossed graduation seals**

Envelope seals embossed with the custom school crest offered.

##### **Traditional or Formal Printing Process**

A variety of printing processes are available to achieve the desired appearance for your announcements.

- Detailed engraved, foiled, lithography or thermograph seal impressions.
- Traditional embossed or litho full or ghosted etchings

- Colored or blind embossing
- Five typestyles
- Text offered with laser print

### **Paper Stock**

Institutions may choose white or ivory Vellum paper, or from an assortment of colored stocks. Balfour offers either French or Dutch folds, and two formal matching inner and outer envelopes.

### **Quality Assurance**

We pride ourselves in producing graduation products of the highest quality. Our entire reputation depends on our ability to consistently produce high quality announcements and accessory products. Proofing announcements for quality and accuracy is a major point of focus. Announcements are proofed at least three times during the manufacturing process. Additionally, our Quality Assurance Inspection team inspects each order before it is shipped to the customer.

### **Delivery**

With state-of-the-art facilities in our Manhattan, KS plant, Balfour provides accurate and timely fulfillment—an important advantage when producing time sensitive material. Announcements will be shipped to the individual student within 24 hours of receipt of the order at no additional charge.

### **Photo Announcements**

Graduates can now share the excitement of their achievement with custom photo products by Balfour. Expanding on Balfour's traditional line of Personalized College Announcements, the Photo Announcement Series captures the very essence of the personalization movement. Balfour offers a variety of designs, colors and fonts so students can create a photo card that will be uniquely theirs. Balfour is one of the first companies in the industry to pursue this venture and offer an alternative to other online outlets. Enclosed you will find a full line of sample designs Balfour has mocked-up specifically for Virginia Commonwealth University.

#### **Photo Announcements Benefits to Students**

- Personalize the products that will represent them to family and friends in the announcement of their upcoming graduation with photos.
- Balfour offers a complete family of support products to accompany the photo announcement, including calling cards, party invitations and thank you notes.
- For students who prefer the traditional announcement, but want to add a bit more personalization with a photo, Balfour offers a custom 4"x 6" photo.

#### **Photo Announcements Benefits to You**

- Provide a product which rivals the online competition for photo announcements yet also offers a benefit the competition can't, official school seals.



- Photo products enable students to buy from a school sanctioned outlet where before they may have gone elsewhere.
- Encourage up-sell opportunities by offering the photo products as partner to the traditional products or on their own with the accompanying products.
- You will receive commissions on all sales of photo announcements.
- Insert that can be slipped in to the traditional announcement provides a new product offering.

(a) Provide samples of standard announcements and of personal announcements. Include accompanying stationery as appropriate.

Below are examples of VCU's current announcement materials. Announcement samples will be personally delivered by the local Virginia Regional Manager, Mike Foltz.

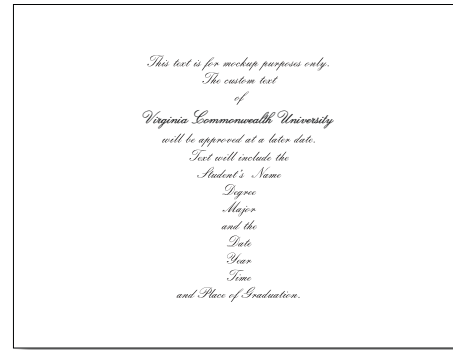


(b) Provide information about the design options and paper stock.

### Design and Development

An experienced artist from our graphics department designs and assists with die proofs for each school's customized announcements. We maintain a large portfolio of etchings and embossings to meet a variety of design needs.

Nathan Lavinka and Mike Foltz have been working with VCU on updating the current VCU announcement. Mock-ups of the proposed new announcement are below.



## Traditional or Formal Printing Process

A variety of printing processes are available to achieve the desired appearance for your announcements.

- Detailed engraved, foiled, lithography or thermograph seal impressions.
- Traditional embossed or litho full or ghosted etchings
- Colored or blind embossing
- Five typestyles
- Text offered with laser print

## Paper Stock

Institutions may choose white or ivory Vellum paper, or from an assortment of colored stocks. Balfour offers either French or Dutch folds, and two formal matching inner and outer envelopes.

### (c) Specify the return-for-credit option for the return of unsold standard announcements sold through the bookstores.

All unsold bookstore inventory can be returned at the end of each year for full credit.

### (d) Provide key order-by and ship-by dates for announcements.

Announcements can be ordered at any time. We recommend ordering four weeks prior to graduation although we are able to ship late orders within 24 hours.

- (e) Outline the program for soliciting announcement orders for the May and December commencements.**

Please refer to Balfour's Marketing Plan on pages 59 - 61 for complete details.

- (f) Describe the firm's ability to include information regarding a diploma ceremony with any marketing material mailed to candidates. Provide additional costs, if any.**

Balfour is happy to include a flyer regarding the diploma ceremony with any marketing material mailed to candidates in its grad fair packet. Additional costs would only be for printing if needed and insertion. Printing would be based on flyer size, inks and paper and insertion costs would be \$.08 per flyer piece.

- b) A designated University representative shall pre-approve all copy prior to printing the announcement for each Commencement.**

Balfour acknowledges and agrees.

- c) The Contractor shall provide VCU with the option of making modifications to the design of the announcements as needed.**

Balfour acknowledges and agrees.

- d) The Contractor shall provide the option of ordering personalized announcements using an ecommerce solution.**

**Describe the announcement and stationery ordering options available on the Internet.**

Balfour maintains a 24/7 online presence for the VCU Graduation announcements where students and graduates can conveniently view the announcement product options and learn more. In addition to all on-campus promotions and Grad Fairs, VCU traditional and photo announcements may be ordered online at any time through this channel. Balfour's web site for its graduation announcements includes a dynamic text preview. This allows students to preview their copy as it is input into the site. Photo announcements are also online and the site includes text and photo preview for students to create their own designs and preview before they pay. This online presence strengthens buy rates by offering efficient ordering and a variety of additional photo options for students looking for a modern way to celebrate graduation.

- e) The Contractor should promote and market the announcement program.**

**Describe how the announcements will be marketed. Include how the Internet will be used for marketing and ordering announcements.**



Balfour will employ a variety of tactics to market the Graduation Announcements to the VCU community. These tactics are detailed below.

### **Graduation Celebration Event**

One of the most successful tactics we've used is the Graduation Celebration/Grad Fair event. A grad fair program energizes and invigorates the commemoration and celebration of graduation. A Grad Fair is an essential one-stop shop that will benefit everyone that participates. To promote this event, Balfour mails a grad fair packet to all graduates in the Fall and Spring that includes materials describing the announcements and any materials from our vendor partners and other vendors on campus such as framing, photography, etc. Specific number of mailers each year is dependent on the number of VCU graduates.

### **Graduation Announcement Display**

Balfour provides a stand alone display which features VCU personalized graduation announcements in the Bookstore, Alumni Association and/or elsewhere on campus. All paper materials are custom to VCU and contact information is provided to grab at times when there is not a promotion in progress on-campus, thus creating an ongoing self-contained marketing element.

### **Graduation Announcement Web Site**

Balfour maintains a 24/7 online presence for the VCU Graduation announcements where students and graduates can conveniently view the announcement product options and learn more. In addition to all on-campus promotions and Grad Fairs, VCU traditional and photo announcements may be ordered online at any time through this channel. Balfour can also send Grad Fair e-mails announcing and driving students to the event or to the web site if students cannot participate in the event.

**Complete Pricing Schedule (attached Excel document, tab: Announcements). Pricing shall include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc. No extra charges are allowed.**

Pricing Schedule is included in Section IV, Pricing Schedules

## **5. Recognition Gifts:**

- a) **The Contractor should provide appropriate gifts for sale recognizing and commemorating the graduation event. The mementos might include date tassels, stoles, etc.**

Balfour acknowledges and agrees.

**Describe the graduation gifts and accessories program proposed. State how the products will be marketed.**

Within the graduation announcements product line, a certificate of appreciation is available to recognize those individuals that were influential in the student's academic success. Students can purchase certificates of appreciation at the grad fair event or customize the certificate online. Also, available is a keepsake announcement cover so that students, their parents and extended family can preserve the announcement as a treasured memento of the graduation event.

Balfour offers a number of accessory items available to students, or to organizations on campus to be awarded to students. Some of the available items are:

Stole of Gratitude – a custom satin stole with embroidery designed to be purchased by the student and given to a family member or mentor in appreciation for helping them with their education. The person receiving the stole wears it during the commencement ceremony. These are typically sold through the University Bookstore.

International Stoles – a custom satin stole unique to each country. Perfect for international students studying at VCU, or VCU students that have studied abroad. These stoles are usually purchased by the student through the bookstore and worn at commencement.

Veterans Stoles – a customized satin stole honoring each branch of the military. These stoles are most often purchased by the university and presented to veterans to wear during the ceremony.

Greek Stoles – a customized satin stole either sold through the bookstore or purchased directly by each organization.

Custom medallion tassel drop – Usually done using the school seal, these tassel drops are available in shiny gold medal, antiqued, silver or antiqued silver or enamel. They are used to replace the date drop on tassels. Use of this item would be decided by the university and would be an overall change to the current tassel look.

Souvenir Tassels – done in school colors and featuring four digit year date drop, souvenir tassels are most often sold through the University Bookstore.

Key Ring Tassels – a smaller version of the souvenir tassel and also featuring the four digit date drop, the key ring tassels are also normally sold through the bookstore.

Honor Cords – Available in a multitude of colors and color combinations, including one color or entwined, honor cords are normally sold to departments on campus.

Please see Section 11 for more information on a new product line that will provide an additional revenue stream to VCU while expanding gift giving occasions beyond graduation.

## 6. Marketing:

- a) **The Contractor should develop a marketing plan each year. Marketing materials should be customized for VCU. The Contract should provide a website to support VCU graduation products.**

Please refer to Balfour's Marketing Calendar on pages 59 - 61.

**Describe or summarize the firm's overall marketing strategy/**

Please refer to Balfour's Marketing Calendar on pages 59 - 61.

- (a) **Provide a sample marketing plan for products and services.**

Please refer to Balfour's Marketing Calendar on pages 59 - 61.

- (b) **Describe the strategies used to nurture a sense of tradition and to build a feeling of pride and exclusivity for individuals using with the VCU products.**

Balfour believes that the key to building the sense of tradition is effectively sharing the VCU Ring, Announcement and Cap and Gown story.

Working alongside student ambassadors and VCU personnel, Balfour will continue to develop the sense of tradition and pride with VCU Products.

Through updated custom marketing materials (Section VII) and updated marketing processes (pages 59 - 61), this unique story will reach students, alumni and parents all over the world.

- (c) **Provide a sample of the custom marketing materials that will be used at VCU.**

Please refer to Section VII for images of the proposed redesigned marketing materials for VCU as well as the hard copy samples included with the RFP.

- (d) Describe the mailing campaign. State the number, timing and target audience of the mailings.

Event	Mail Date	Target Audience	Mailing List Size (estimated)
Fall Ring Ordering Event	2 weeks before event	All eligible students and parents	11,000
Fall Grad Fair	2 weeks before event	December grads – Monroe Park and MCV campuses	3,000
Ring Ceremony	2 weeks before event	Ring recipients	150
Spring Ring Ordering Event	2 weeks before event	All eligible students and parents	11,000
Spring Grad Fair	2 weeks before event	Graduating seniors	4,200
Spring Ring Ceremony	2 weeks before event	Ring recipients	200

- (e) Describe customer incentive programs.

Balfour offers a couple of incentive programs for customers throughout the year to give urgency to the ordering process. We have two types of delivery programs for ring buyers.

**Guaranteed Holiday Delivery**

Balfour will provide Alumni and students Guaranteed Holiday Delivery if they order by a specific date.

**Guaranteed Graduation Delivery**

Balfour will provide students with Guaranteed Graduation Delivery if they order by a specific date.

- (f) Describe how the internet, e-mail, social media will be used to market products.

**Balfour.com**

Balfour maintains a 24/7 online presence for the VCU Grad Products offering. Students and graduates can conveniently view the ring and learn more about the ring tradition and the ring ceremony. In addition to all on-campus promotions, VCU Rings and graduation announcements may be ordered online at any time through this channel.

Balfour continues to invest in the online experience particularly in the promotion of official ring programs, creating a presence that is unprecedented in this industry, and will strengthen buy rates by helping schools tell their ring stories even more effectively, and efficiently.

### **Ring Web Banner and Button Ads**

Online sales have climbed steadily throughout the last several academic years thus we develop custom Web banner ads to place on alumni, University and bookstore Web sites to reinforce direct mail campaigns for ring events and grad fairs. Web banner ads have a live link to the school's home page on Balfour.com where students, parents and alumni can learn more about the ring tradition or graduation products.

### **E-mail Campaigns**

We have developed e-mail templates for distribution to VCU students and alumni to reinforce direct mail campaigns. These e-mails are sent with a live link to the VCU Ring Web site where they can learn more about the tradition, order online, or call our toll-free number to visit with a customer service representative. While e-mails may be sent periodical-ly as a stand alone message, an ongoing reference to the ring tradition is also encouraged within alumni e-newsletters and e-postcards to students and grad-uates. We would also recommend taking advantage of any and all electronic communication opportuni-ties through the alumni and/or parent organizations. For example, news regarding future ring ceremonies at VCU should be routinely reported in any parent e-newsletters, an ideal way of building awareness of the tradition retroactively to parents and in some cases, alumni.

Email campaigns have also been implemented to support grad fair events and the many services students can take advantage of by attending the grad fair.

### **Social Media Strategies**

Because much of the student's participation in the ring program is driven by their connection to the institution, we have encouraged our campus ambassadors for the ring tradition to reach out using their social media channels for a more relevant, meaningful student experience.

- Campus ambassadors have built pages specific to the ring tradition or have posted pertinent ordering event information, photos from the ring ceremonies or moving testimonials about students' participation in the ring program.
- Social media is an excellent forum to build awareness amongst students not yet eligible to participate in the ring tradition.
- The rituals of the ring tradition or ring ceremony make for well-attended events where the excitement spills over into social media with students posting photos of their rings or tweeting about their experience of receiving their ring from a campus dignitary or mascot with their family in attendance. This, combined with the wide array of comprehensive social media strategies

Balfour is implementing, will result in increased awareness for the ring tradition at VCU. For instance, the “flash ringing” phenomena that’s taking place at ring ceremonies throughout the country is an especially viral way of building awareness of the ring and ring presentation events. This is an exciting and potent arena for marketing rings online – and Balfour leads the way in carrying out these marketing methods on a turn-key basis and in partnership with the school.

- To leverage Social Media’s broad presence and utilize peer-to-peer communication to drive additional foot traffic to the table, Balfour recommends adding a social media component to the Ring Week ordering event. Balfour will provide a backdrop and props to create a photo booth at the ordering event to build awareness and drive students to the event. This allows for additional amplification of the school’s ring tradition and our presence on campus.

**(g) Acknowledged the firm is willing to accept all costs associated with marketing the products and services offered.**

Balfour acknowledges and agrees.

- b) The Contractor should market products through the VCU Bookstores. The stores may add a markup, approved by the University, on products sold through the stores. The University stores will support the ring and regalia order and delivery process.**

**Acknowledge and agree.**

Balfour acknowledges and agrees. Please note that the retail pricing provided in our response for graduation announcements and rings includes all royalties and licensing fees payable to any VCU entity. The retail pricing available to the student whether ordered at an on-campus event, through the bookstore or online will be consistent across all ordering methods.

- c) All mailing lists/files or other media containing personal information about students, alumni, faculty and staff shall be considered protected data and are intended for use as directed in this RFP. Any other use of this protected data is strictly prohibited without written permission of Virginia Commonwealth University.**

Balfour acknowledges and agrees.

- d) The Contractor shall, at minimum, meet with the bookstore prior to every graduation, in person or virtually, to discuss graduation logistics. In addition, the Contractor shall attend a Grad Fair preparation meeting, in person or virtually, with the bookstore, alumni, and other partners.**

Balfour acknowledges and agrees.

## **7. Reporting:**

- a) The Contractor shall provide an accounting summary reports detailing unit sales through all venues. At a minimum the reports shall include the following (to be finalized upon award of contract):**

- (a) Class ring sales by campus, to include but not be limited to ring style, metal, purity, sales price, quantity, source (online, in-person, etc.), customer type (alumni, student by year, etc.).**

Balfour acknowledges and agrees.

- (b) Personalized announcement sales by campus;**

Balfour acknowledges and agrees.

- (c) Regalia sales by campus, and**

Balfour acknowledges and agrees.

- (d) Standard announcement sales by campus.**

Balfour acknowledges and agrees.

- b) Contractor should formally meet with representatives from the University at least annually to evaluate services and to review accounting reports. The “Annual Program Review” will consider the status of the current program and recommend action plans as appropriate. Topics may include issues related to sales trends, unit sales summary reports, marketing and evaluation results.**

Balfour acknowledges and agrees.

- c) For this contract, Contractor’s fiscal reporting period shall comply with the University’s Fiscal Year which is July 1 through June 30. All monthly reporting shall consist of data for the complete period, from the first day of the calendar month through the last day of the calendar month.**

Balfour acknowledges and agrees.

- d) The Contractor shall e-mail a monthly report in a spreadsheet format to the University. The monthly reports shall be submitted by the 10th of each month following the reporting period.**

Balfour acknowledges and agrees..

- e) Should the report due date fall on a weekend or holiday, reports and/or payments are due on the next business day.**

Balfour acknowledges and agrees.



- f) **On the monthly statement, Contractor should explain discrepancies with a deviation of 3% from prior year's financial accomplishments;**

Balfour acknowledges and agrees.

- f) **Reports required from the Contractor shall be submitted on time. A three-day grace period will be given up to two times each year. In the event a report is submitted more than three days past the required deadline or is submitted late more than two times per Fiscal Year, without reasonable cause, the University may impose a \$1,000 penalty.**

Balfour acknowledges and agrees.

- g) **The Contractor's Accounting Liaison should meet with the University upon request to review any operating statements or reports to identify issues and to develop an action plan for resolution. Any operating statements requiring adjustments because of a review audit shall be identified and reflected on the next reporting month.**

**The University should be informed by the Contractor of the schedule of the Contractor's audit of the records and operations at the University/ The University shall have the option to participate in the Contractor's audits and shall receive a full audit report of findings regardless of the University participation.**

Balfour acknowledges and agrees.

- i) **The Contractor should submit all reports and payments to:**

**VCU Retail Services – Accounting Department  
Virginia Commonwealth University  
Box 980208  
Richmond, VA 23298-0208**

Balfour acknowledges and agrees.

- j) **Electronic reporting and payment submission addresses will be determined upon contract award.**

**Acknowledge and accept the Section 7 – Reporting, all statements (a-k).**

Balfour acknowledges and agrees.

## **8. Financial:**

- a) **All pricing shall include University royalty payments and licensing fees where appropriate.**

Balfour acknowledges and agrees.

- b) **The Contractor shall propose a royalty on the gross total items sold and minimum annual royalty guarantee. An amount equal to 1/12th of the minimum annual royalty payment is due**

**monthly by the 10th of each month. Complete Pricing Schedule (Appendix III – MAG tab).**

- (a) All net sales (gross sales minus taxes), including but not limited to cash, check, internal transfers, gift card redemption and debit/credit card, shall be recorded as revenues on financial reports at retail values.**

Balfour acknowledges and agrees.

- (b) Royalties shall be computed on net sales.**

Balfour acknowledges and agrees.

- (c) Royalties shall be paid to the University in the period they were earned and charged, and not upon collection date. The Contractor shall not be reimbursed for royalties paid on uncollected accounts.**

Balfour acknowledges and agrees.

- (d) Uncollectable funds shall be the responsibility of the Contractor.**

Balfour acknowledges and agrees.

- (e) Contractor should provide the University a Minimum Annual Royalty Guarantee for each contract year, based on the University's Fiscal Year, for a period of five (5) years per response submitted in the Proposed Price spreadsheet, as negotiated, which will become document of record for contractual purposes.**

Balfour acknowledges and agrees.

- (f) After the initial fixed Minimum Annual Royalty Guarantee agreement term, the final initially agreed upon contract year Minimum Annual Royalty Guarantee will increase by 5% per year thereafter.**

Balfour acknowledges and agrees.

- (g) Contractor should pay the Minimum Annual Royalty Guarantee amount in equal monthly installments by the 10th of each calendar month based upon the University's Fiscal Year. Should the payment due date fall on a weekend or holiday, payments are due on the next business day.**

Balfour acknowledges and agrees.

- (h) Contractor shall monitor sales and calculate royalties payable to the University for each University Fiscal Year. If, and to the extent, that royalties due the University exceed the Minimum Annual Guarantee, the Contractor should pay the excess amount by August 10.**

Balfour acknowledges and agrees.

- (i) Minimum Annual Royalty Guarantee shall be computed on total net sales of contract. (Please complete Appendix III, MAG tab)**

Balfour acknowledges and agrees making note of the response to vendor questions RFP#: 7629420BA, Graduation Products Questions and Answers I, Q2 which excluded regalia from the MAG calculation.

- c) **The Contractor shall pay the licensing fee on all emblematic merchandise.**

**Acknowledge and agree.**

Balfour acknowledges and agrees.

## **9. Transition:**

- a) **The Contract should provide a seamless transition to the new agreement.**

Balfour will seamlessly integrate the new features of this agreement to ensure a great experience to students, alumni and friends of VCU.

**As necessary, describe how your firm will implement the new agreement. Provide estimated dates for key tasks.**

Balfour acknowledges and agrees. Since Balfour is the current Contractor for rings and announcements, we would have no issues in this regard.

Balfour's regalia transition team stands ready to work with VCU to ensure a seamless transition. Our transition team is comprised of senior members of our management team from Distribution, Customer Service, Manufacturing, Marketing, Finance and On-Site service. As the fastest growing brand in the industry, this team is driven and focused on success at VCU.

Time-line and Critical Dates:

### **August/September 2017**

- University approval of official samples
- Licensing approval and registration
- University approval of marketing materials and signage
- Schedule Fall & Spring Events
- Regalia production begins
- Review faculty rental order history
- Set-up online registration system for Graduates and Faculty
- Meet with various campuses to develop customized distribution plan

### **January 2018**

- Balfour's warehouse is fully stocked with 125% of anticipated needed regalia for May
- Request list of potentially eligible graduates with degrees (if registration eligibility and degree pre-population is being used)
- Email blast to graduates informing them that spring registration is open

- b) **The Contractor shall be prepared to provide regalia for the May 2018 Commencement.**

Balfour acknowledges and agrees.

- c) **The Contractor shall be prepared to offer the “Official” VCU class ring(s) during the Spring 2018.**

Balfour acknowledges and agrees.

**10. Experience and Qualifications of Firm: a) Firm should provide:**

- a) **List of three references for whom similar services were provided, preferably of public institutions of higher education or a similar sized organization.**

School	Length of Service	Address	Contact Person
University of Notre Dame	80 Years	Hammes Notre Dame Bkstore University of Notre Dame Notre Dame, IN 46556	David Werda 574-631-9712
Virginia Polytechnic Institute	15 Years	Virginia Tech Alumni Assoc Holtzman Alumni Center-0102 Blacksburg, VA 24061	Laura Wedin 540-231-6285
University of Maryland	10+ Years	Samuel Riggs IV Alumni Ctr College Park, MD 20742  University Book Center Stamp Student Union College Park, MD 20742	Jessica Roberts 301-405-7081  Mike Gore (301) 314-2665
Columbia University	7+ Years	706 Lerner Hall, MC 2603 2920 Broadway New York, NY 10027	Honey Fishman (212) 854-6862

Please also refer to Section V for a more extensive list of Balfour’s Virginia and National References.

- b) **Provide a list of institutions of higher education with which the firm has a signed term contract.**

In the State of Virginia, Balfour has the following institutions under contract: Virginia Tech, James Madison, Mary Washington, University of Virginia, Washington & Lee University, University of Richmond, Roanoke College and Longwood University. Balfour has many more exclusive accounts in the State of Virginia and the United States. A full list can be provided if needed.

- c) Provide the amount of annual sales the firm has with each VASCUPP Member Institution. A list of VASCUPP Members can be found at <http://www.vcu.edu/procurement/purchasing/contracts/aboutvascupp.html>.

**THE INFORMATION BELOW IS CONFIDENTIAL & PROPRIETARY TO BALFOUR**

VASCUPP MEMBER INSTITUTION	TOTAL REVENUE
GEORGE MASON UNIVERSITY	
JAMES MADISON UNIVERSITY	
OLD DOMINION UNIVERSITY	
RADFORD UNIVERSITY	
VIRGINIA POLYTECHNIC INST & ST UNIV	
UNIVERSITY OF VIRGINIA	
VIRGINIA COMMONWEALTH UNIVERSITY	
VIRGINIA MILITARY INSTITUTE	
WILLIAM & MARY UNIVERSITY	
GRAND TOTAL	

**11. Other related goods/services:**

Describe other related goods and/or services provided by your firm. Provide information to demonstrate how these goods and/or services could benefit the institution and include the associated pricing for the term of the contract. Provide information to address how newly introduced products and services would be offered and included in the contract. Include information on your ability to provide most favored nations pricing.

**THE INFORMATION BELOW IS CONFIDENTIAL & PROPRIETARY TO BALFOUR**







## **12. Marketing:**

- a) VCU marks and logos are registered with government agencies and currently licensed through the Collegiate Licensing Company (CLC). All merchandise prices shall include all applicable licensing fees. The current CLC licensing rate is 12% per unit and may change periodically. Contractor will receive notice from CLC of any licensing fee changes. The University reserves the right to change Licensing Vendors and will provide notice of said change at its earliest convenience. The Contractor shall comply with any Licensing vendor change requirements and University Trademarks and Licensing Policies.**

Balfour acknowledges and agrees.

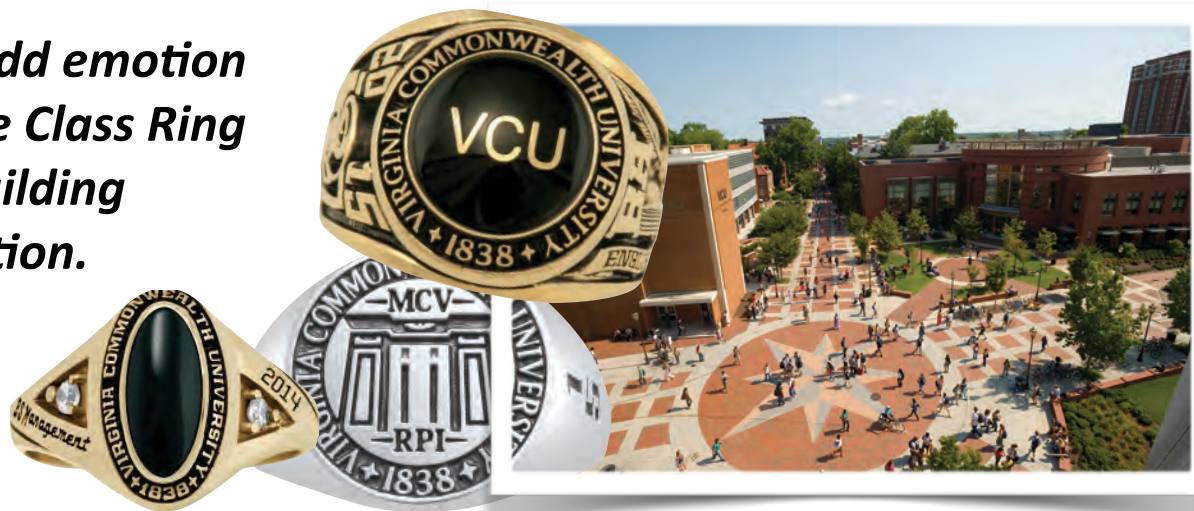
- b) All marketing or use of licensed materials of any type must be approved in writing by the Business Services Marketing Manager.**

Balfour acknowledges and agrees.

# **balfour**®

**Your One-Stop Shop  
for Graduation.**

*We add emotion  
to the Class Ring  
by building  
tradition.*



*We declare your  
graduate's academic  
achievement.*



*We ensure your  
graduation is  
stress free.*



*We are constantly  
innovating.*

*Introducing*

**balfour** | gifts





# VCU



## SECTION III

REQUEST FOR PROPOSAL 7629420BA  
VIRGINIA COMMONWEALTH UNIVERSITY  
REQUIRED FORMS

**balfour**<sup>®</sup>

## Request for Proposals RFP #7629420BA

**Issue Date:** 06/29/2017

**Title:** Graduation Products

**Send All Proposals To:** Virginia Commonwealth University  
RFP #7629420BA  
Attention: Brandon C. Augustine  
912 W Grace St, 5th floor  
Richmond, Virginia 23284-0327

**Proposals Shall Be Received Until:** 07/25/2017 @ 2:00 PM

**Direct ALL inquiries concerning this RFP to:** Brandon C. Augustine, Category Manager  
baugustine@vcu.edu

**Questions concerning this RFP must be received via email no later than:** 07/12/2017 @ 4:00PM

This Request for Proposals & any Addenda are posted on the eVa website at: <http://www.eva.virginia.gov>

HARD-COPY, ORIGINAL PROPOSALS MUST BE RECEIVED IN VIRGINIA COMMONWEALTH UNIVERSITY'S DEPARTMENT OF PROCUREMENT SERVICES ON OR BEFORE THE DATE AND TIME DESIGNATED ON THIS SOLICITATION. ELECTRONIC SUBMISSIONS AND FACSIMILE SUBMISSIONS WILL NOT BE ACCEPTED IN LIEU OF THE HARD-COPY, ORIGINAL PROPOSAL. VENDORS ARE RESPONSIBLE FOR THE DELIVERY OF THEIR PROPOSAL. PROPOSALS RECEIVED AFTER THE OFFICIAL DATE AND TIME WILL BE REJECTED. THE OFFICIAL DATE AND TIME USED IN RECEIPT OF RESPONSES IS THAT TIME ON THE CLOCK OR AUTOMATIC TIME STAMP IN THE DEPARTMENT OF PROCUREMENT SERVICES.

**IF PROPOSALS ARE HAND DELIVERED OR SENT BY FEDEX, UPS, OR ANY OTHER PRIVATE COURIER, DELIVER TO THE ADDRESS NOTED ABOVE: VIRGINIA COMMONWEALTH UNIVERSITY, RFP #7629420BA, ATTENTION: Brandon C. Augustine, 912 W. GRACE ST., 5TH FLOOR, RICHMOND, VA 23284-0327. IF USING US MAIL (NOT RECOMMENDED): IF PROPOSALS ARE MAILED VIA US MAIL, MAIL TO VIRGINIA COMMONWEALTH UNIVERSITY, RFP#7629420BA, ATTN: Brandon C. Augustine, BOX 980327, RICHMOND, VA 23298-0327. THE RFP NUMBER, DATE AND TIME OF PROPOSAL SUBMISSION DEADLINE, AS REFLECTED ABOVE, MUST CLEARLY APPEAR ON THE FACE OF THE RETURNED PROPOSAL PACKAGE.**

In Compliance With This Request for Proposals And To All Conditions Imposed Therein and Hereby Incorporated By Reference, The Undersigned Offers And Agrees To Furnish The Goods/Services Described Herein In Accordance With The Attached Signed Proposal Or As Mutually Agreed Upon By Subsequent Negotiation. Furthermore, The Undersigned Agrees Not To Start Any Work Relative To This Particular Solicitation Until A Resulting Formal Signed Purchase Order Is Received By The Contractor From University's Department of Procurement Services. Any Work Relative To This Request for Proposals Performed By The Contractor Prior To Receiving A Formal Signed Purchase Order Shall Be At The Contractor's Own Risk And Shall Not Be Subject To Reimbursement By The University.

**Signature below constitutes acknowledgement of all information contained through links referenced herein.**

**NAME AND ADDRESS OF COMPANY:**

Commemorative Brands, Inc. dba Balfour	Date: July 24, 2017
7211 Circle S Road	By (Signature In Ink):
Austin, TX Zip Code 78745	Name Typed: Robbin C. Gibbins
E-Mail Address: robb.gibbins@balfour.com	Title: Chief Financial Officer
Telephone: (512 ) 444-0571	Fax Number: ( 440 ) 2161
<b>Toll free, if available</b>	<b>Toll free, if available</b>
DUNS NO.: 06-642-9374	FEI/FIN NO.: 13-3915801
REGISTERED WITH eVA: <input checked="" type="checkbox"/> YES ( ) NO	SMALL BUSINESS: ( ) YES <input checked="" type="checkbox"/> NO
VIRGINIA DSBSD CERTIFIED: ( ) YES <input checked="" type="checkbox"/> NO	MINORITY-OWNED: ( ) YES <input checked="" type="checkbox"/> NO
DSBSD CERTIFICATION #:	WOMEN-OWNED: ( ) YES <input checked="" type="checkbox"/> NO

A Pre-Proposal conference will not be held.

REQUEST FOR PROPOSALS RFP# 7629420BA

Page 2 of 22





# VCU

## Procurement Services

### RFP#: 7629420BA, Graduation Products Questions and Answers I

- Q1. Is Regalia subject to the same 12% CLC royalty requirement?
- A1. Regalia is subject to the current CLC licensing rate. See RFP section VI. Statement of Needs, A.3.i.
- Q2. Should Regalia be part of a minimum royalty guarantee calculation? Or is that just relevant to Rings/Announcements?
- A2. It should not be included.
- Q3. What is the current retail price charged to students and faculty for Regalia?
- A3. **Student Purchase Pricing**
- Regalia prices, including cap, gown, hood and tassel are: bachelor set, \$55.98; master set, \$76.98; Ph.D./Ed.D. set, \$91.98; and professional doctorate set, \$59.98 (professional doctorate programs include D.P.T., D.D.S., Pharm.D., M.D. and D.N.A.P.). Prices do not include sales tax.

#### Faculty Rental Pricing

Bachelor Cap and Gown	\$16.50
Master Cap and Gown	\$19.50
Doctor Cap and Gown	\$23.00
Doctor Tam and Gown	\$38.00
Doctor Tam Only	\$20.00
Bachelor Hood	\$16.50
Master Hood	\$19.50
Doctor Hood	\$23.00

Faculty purchase pricing varies based on the regalia components and quality purchased.

- Q4. Have there been any specific challenges and frustrations experienced by VCU with the current Regalia program?
- A4. No.
- Q5. Does VCU seek specific improvements in the regalia program delivered to their students?
- A5. VCU is seeking offers that maintain the quality of regalia while lowering the cost to students.
- Q5. Would the committee consider adding new metals for rings – that fall within the official ring

program?

A5. Offerors may propose supplemental metal options to the “Official” collection of rings for approval by VCU, but any such proposal shall be submitted under RFP VI. Statement of Needs, Section A.2.b.

Q6. How many degrees are conferred at winter and spring commencement?

A6. Fall 2015: 2,035 degrees/certificates conferred

Spring 2016: 4,777 degrees/certificates conferred

Q7. How many degrees are conferred at winter and spring commencement?

A7. See response to Q6.

Q8. Who is on the selection committee? (Name, title and position)

A8. N/A

Q9. Please clarify section 4af on page 11. What does VCU mean by diploma ceremony?

A9. Diploma ceremonies could be school- or campus-level commencement ceremonies.

Q10. Are diploma frames part of this RFP?

A10. No.

Q11. We are a SWaM business in Virginia. We are only able to submit a proposal for Academic Regalia and Recognition Gifts. Is that acceptable? Does VCU only consider the contractors who can provide all the products?

A11. See RFP Section VI, Statement of Needs:

Proposals that are substantially incomplete or lack key information may be rejected by VCU. Please note that utilization of the words “shall” or “must” indicates a mandatory requirement.

Q12. We’re confused about providing samples of regalia. Do we have to provide the samples for each category, i.e. bachelor, master, Ph.D. and professional doctor? Do we have to follow the exact styles shown in the spreadsheet provided?

A12. See RFP VI. Statement of Needs, Section A.3.n.

Q13. We currently don’t have the CLC license for VCU. Is it okay to use VCU logos and seals for the samples of regalia?

A14. Virginia Commonwealth University maintains several protected wordmarks and logos. Only approved licensees will be able to produce, display and distribute merchandise bearing these wordmarks and logos.

The following protected names and official artwork are the approved marks for use in representing

VCU. Any mark other than the following must be approved by the VCU Division of University Relations and the VCU Office of Trademarks & Licensing.

The following are Registered and Protected Names of Virginia Commonwealth University:

- Virginia Commonwealth University
- VCU
- VCU Rams
- Rams
- VCU Health
- Havoc

Q15. Please provide the number of rings sold in 2014 and in 2015.

A15. The following ring sales numbers are approximate:

July 2015-June 2016: 361

July 2014-June 2015: 378

Q16. Please provide the total value of the rings sold in 2014, 2015 and 2016.

A16. 2014 Data not readily available. In calendar year 2015, the value of rings sold was approximately \$156K, in 2016 it was approximately \$142K.

Q17. Ring payment clarification:

There is a 5% annual increase over the initial University Royalty offered in the RFP.

The initial amount offered will have a 50% increase in the 10th year of the contract. These payment amounts are not based on the of the number of rings sold each year, but on the initial offer with the annual percentage increase.

A17. Financial requirements are detailed in RFP Section VI. Statement of Needs, section 8.

Q18. Please provide the Minimum Annual Royalty Guarantee amount paid in 2014, 2015 and 2016.

A18. 2014: \$60,500

2015: \$66,500

2016: \$70,000

Q19. Are there any additional payments on regalia, announcements or rings other than to CLC licensing?

A19. The RFP outlines all payment requirements for regalia, announcements and rings.

Q20. Does the VCU Bookstore or any VCU office receive any rebate or commission? Is this revenue added to the RFP prices to calculate the retail?

A20. The Bookstore purchases regalia from our current partner and marks it up to a retail price.



- Q21. If there were additional payments, please provide details for 2015 and 2016.
- A21. In 2015 and 2016, the University received approximately \$35-36K per year in Announcement Royalties, \$8,500 per year in Marketing Funds, 4 gratis rings per year to support the ring tradition, 4 \$100 gift cards per year for our current partner, 4 basic invitation packages per year, and 20 free marshall sashes per year.
- Q22. Student regalia is purchased by the students and not the university. Regalia is not charged to the student in any kind of university fee?
- A22. Regalia is not charged to the student in a university fee, students purchase their regalia from the campus bookstores.
- Q23. Please provide the CLC licensing payments for rings, regalia and announcements for 2014, 2015 and 2016.
- A23. 2014 data is not readily available.

*The following data is an approximation and is based on the University Fiscal Calendar of July 1 – June 30:*

**Announcement Royalties**

FY2015: \$5,654

FY2016: \$5,430

**Ring Royalties**

FY2015: \$3,840

FY2016: \$3,590

Please note that the licensing policy has recently been updated and regalia was custom-branded for the first time last semester, so historical data will not be the best indicator of future payments. Spring 2017 semester's CLC royalties for regalia were approximately \$9,000.

Acknowledge Receipt of Questions & Answers 1

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Robbin C. Gibbins, Chief Financial Officer  
July 24, 2017

## APPENDIX I

### PARTICIPATION IN STATE PROCUREMENT TRANSACTIONS SMALL BUSINESSES AND BUSINESSES OWNED BY WOMEN AND MINORITIES

The following definitions will be used in completing the information contained in this Appendix.

#### Definitions

- **Small business** is an independently owned and operated business 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. Nothing in this definition prevents a program, agency, institution or subdivision from complying with the qualification criteria of a specific state program or federal guideline to be in compliance with a federal grant or program.
- **Women-owned business** is 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.
- **Minority-owned business** is 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.
- **Minority Individual** "Minority" means a person who is a citizen of the United States or a legal resident alien and who satisfies one or more of the following definitions:
  - "Asian Americans" means all persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands, including but not limited to Japan, China, Vietnam, Samoa, Laos, Cambodia, Taiwan, Northern Marianas, the Philippines, U. S. territory of the Pacific, India, Pakistan, Bangladesh and Sri Lanka and who are regarded as such by the community of which these persons claim to be a part.
  - "African Americans" means all persons having origin in any of the original peoples of Africa and who are regarded as such by the community of which these persons claim to be a part.
  - "Hispanic Americans" means all persons having origin in any of the Spanish speaking peoples of Mexico, South or Central America, or the Caribbean Islands or other Spanish or Portuguese cultures and who are regarded as such by the community of which these persons claim to be a part.
  - "Native Americans" means all persons having origin in any of the original peoples of North America and who are regarded as such by the community of which these persons claim to be a part or who are recognized by a tribal organization.
  - "Eskimos and Aleuts" means all persons having origin in any of the peoples of Northern Canada, Greenland, Alaska, and Eastern Siberia and who are regarded as such in the community of which these persons claim to be a part.



## APPENDIX II INVOICING AND PAYMENT

### Invoicing:

The Contractor shall submit a fully itemized invoice to Virginia Commonwealth University, Accounts Payable and Support Services, Box 980327, Richmond, VA 23298-0327, that, at minimum, includes the following information: the Virginia Commonwealth University purchase order number; a description of the goods or services provided; quantities; unit prices; extended prices; and total prices. Payment will be issued in accordance with the payment method selected below and with the Commonwealth of Virginia Prompt Payment Legislation.

Upon request by VCU, the Contractor shall submit invoices electronically using the Ariba Network or other e-commerce channel utilized by VCU; and agrees to comply, within reason, with any future e-commerce initiatives including, but not limited to: procurement, procurement content, sourcing or any other electronic procurement and sourcing solutions.

Questions regarding this method of invoicing should be sent to: [ecommerce@vcu.edu](mailto:ecommerce@vcu.edu).

### Payment:

VCU Procurement Services is automating the payment process to the greatest extent possible. Contractors are encouraged to accept payment electronically through the commercial card program. Please review the payment methods described below and select one for your firm. By selecting the payment method below, Contractor acknowledges that the selected payment method is **not specific to the contract resulting from this solicitation and will apply to all payments made to the Contractor** by Virginia Commonwealth University. For example, if the Contractor has an existing contract(s) and is currently receiving payment by paper check, and the Contractor is now electing to receive payment by the commercial card, **all payments** will be made using the commercial card once the commercial card payment process is implemented for the firm.

#### **Payment Methods**

**1. Electronically through a Wells Fargo Visa commercial card:** Payment will be made ten days (10) after receipt of a proper invoice for the amount of payment due, or ten (10) days after receipt of the goods or services, whichever is later.

It is the Contractor's responsibility to contact its banking institutions to determine any credit limit that may restrict the payment of invoices. It is the Contractor's responsibility to have its credit limit raised as necessary to facilitate the timely payment of all invoices. Invoices exceeding the Contractor's credit limit will be returned unpaid.

Failure to accept the commercial card after award of contract will be considered a contract compliance issue and will be addressed accordingly. In addition, invoices will be returned without payment until the Contractor can accept the payment through the commercial card.

Questions regarding this method of payment should be sent to [commcard@vcu.edu](mailto:commcard@vcu.edu).

2. **ACH:** Electronic payment via automated clearing house (ACH) to the vendor provided bank account of record. Payment is processed thirty (30) days after receipt of a proper invoice for the amount of payment due, or thirty (30) days after receipt of the goods or services, whichever is later. Additional information about ACH payments is available at: <http://treasury.vcu.edu/banking/vendor-ach/>.

**Contractor must indicate the method of payment selected:**

<input type="checkbox"/>	Commercial Card Payment (Wells Fargo VISA)
<input checked="" type="checkbox"/>	Automated Clearing House (ACH)

**Invoicing and Payment Method Acknowledgement:**

Signature:	_____
Name Printed:	Robbin C. Gibbins
Title:	Chief Financial Officer
Name of Firm:	Commemorative Brands, Inc. dba Balfour
Date:	July 24, 2017

Please identify the following contact information for the individual who will serve as the appropriate point of contact within your company to be contacted by VCU Accounts Payable to implement the electronic invoicing and payment processes:

Name of the individual:	Stephanie Soliz
Title:	Credit Representative
Mailing address:	7211 Circle S Road
	Austin, TX 78745
Email address:	stephanie.soliz@balfour.com
Phone number:	512-440-2259
Fax number:	512-442-4221



# VCU



## SECTION IV

REQUEST FOR PROPOSAL 7629420BA  
VIRGINIA COMMONWEALTH UNIVERSITY  
PRICING TEMPLATES

**balfour**<sup>®</sup>

Virginia Commonwealth University  
Graduation Product RFP  
Price Worksheet

**Contractor Instructions**

The Offeror shall commit to pay a Minimum Annual Guarantee Royalty (MAGR) for the university Fiscal Years (FY) (beginning July 1 and ending June 30) as stipulated in the Request for Proposal (RFP)

	Year 1	Year 2	Year 3	Year 4	Year 5
Minimum Annual Guarantee Royalty Offer	\$ 75,000	\$ 78,750	\$ 82,700	\$ 86,800	\$ 91,200
MAG Royalty Rate on Total Contract Net Sales	15%	16%	16%	16%	17%

As in the current agreement, the MAG Royalty Rate is not expressed as a percentage, but royalty revenue earned on the sale of rings and announcements is credited toward the total dollar figure for the MAG Royalty Rate.

**Contractor Instructions**

By signing below it is stated that the values above represent the Contractor's offer to Virginia Commonwealth University:

		Chief Financial Officer	July 24, 2017
Contractor Signature	Robbin C. Gibbins	Title	Date



**Contractor Instructions**

The Offeror shall complete the highlighted cells below

The following formula will be used to determine the change in price due to increases in the market price of gold.  
**(Change in gold market) x (Gold Factor) x (Ring Pennyweight (dwt)) = Price rounded to the nearest \$5 increment**  
The following factors will be used for each karat of gold:

**\$1000/oz Fixed Gold Price (for RFP calculation purposes only)**  
*Future price increase/decrease will be based London PM Fix.*










Gold	Purity		
	10K	14K	18K
Gold Factor per \$1	0.021	0.029	0.038

Sample Ring Pricing	dwt	oz	Student Price
Traditional-style Ring (10K Gold, to include all costs for furnishing the products to include delivery (F.O.B. Destination), materials, labor, etc.)	12	0.658	\$ 785.00
	10	0.549	\$ 745.00
	8	0.439	\$ 665.00
	4	0.219	\$ 570.00
	2	0.110	\$ 520.00

**Contractor Instructions**

The Offeror shall complete the highlighted cells below

Virginia Commonwealth University Official Ring Specifications Commemorative Brands, Inc. dba Balfour										
Men's					Women's					
Large Traditional Scholar with Signet Top (SCHOL L SIG)	Large Traditional Scholar with Stone (SCHOL L STN)	Large Signet	Small Traditional Scholar with Signet Top (SCHOL S SIG)	Small Traditional Scholar with Stone (SCHOL S STN)	Small Signet	Illusion	Signature	Windswept		
										
12.5	11	7	8.5	8	4	4	3	2		
\$595.00	\$585.00	\$550.00	\$540.00	\$540.00	\$505.00	\$500.00	\$500.00	\$490.00		
\$289.00	\$289.00	\$289.00	\$289.00	\$289.00	\$289.00		\$289.00			
choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	NA	NA	NA		
choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	choice of VCU designs or curriculum designs	choice of VCU designs or curriculum designs	NA	NA	NA	NA		
NA	NA	X	NA	NA	X	NA	NA	NA		
NA	NA	X	NA	NA	X	NA	NA	NA		
degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year	degree letters or grad year		
year	year	year	year	year	year	year	year	year		
NA	X	NA	NA	X	NA	X	X	X		
Smooth	X	NA	NA	X	NA	NA	X	NA		
Faceted	NA	NA	NA	NA	NA	X	X	X		
Fireburst	NA	NA	NA	NA	NA	NA	NA	NA		
Engraving	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available	alpha/numeric and Greek available		
Stone Details						four .02 carat + four .015 carat + four .01 carat diamonds or cz's, total carat wt = .18	two .03 carat + two .02 carat + two .03 carat diamonds or cz's, total carat wt = .06	two .01 carat + two .02 carat + two .03 carat diamonds or cz's, total carat wt = .12		
						Price quoted above includes cubic zirconia; diamonds available at additional charge	Price quoted above includes cubic zirconia; diamonds available at additional charge	Price quoted above includes cubic zirconia; diamonds available at additional charge		

**Contractor Instructions**

The Offeror shall complete the highlighted cells below

B. Academic Regalia:

Student Regalia:					
Provide a unit price for the initial term of the					
	Sales Price to Bookstore	Suggested Markup	Suggested Student Price		
Bachelor - (Gown-Cap-Tassel-Hood)	\$ 31.30	+ \$ -	12.52 \$	43.82	
Master - (Gown-Cap-Tassel-Hood)	\$ 40.32	+ \$ -	16.13 \$	56.45	
Professional Doctor - (Gown-Cap-Tassel-Hood) (Health Sciences Gown must show degree color)	\$ 49.25	+ \$ -	19.70 \$	68.95	
PhD - (Gown-TAM-Tassel-Hood) (Gown must show black velvet)	\$ 61.75	+ \$ -	24.70 \$	86.45	
Tassel	\$ 1.80	+ \$ -	0.72 \$	2.52	
Tam	\$ 14.25	+ \$ -	5.70 \$	19.95	

Rental Regalia:		
Provide a unit rental cost price for the initial term of the agreement (three years). Prices shall include give-away tassels.		
Bachelor - (Gown-Cap-Tassel-Hood)	\$	21.25
Master - (Gown-Cap-Tassel-Hood)	\$	24.75
Professional Doctor - (Gown-Cap-Tassel-Hood) (Health Sciences Gown must show degree color)	\$	28.00
PhD - (Gown-Cap-Tassel-Hood) (Gown must show black velvet)	\$	28.00
Tam	\$	12.50

C. Announcements:

	Quantity per pack	Unit Cost	Cost Each	Royalty Each
Personalized:	25	\$49.25	\$ 1.97	\$ 0.87
	Quantity per pack	Sales Price to Bookstore	Suggested Markup	Suggested Student Price
Generic:	1	\$0.60	\$ 0.60	\$ 1.20

## Announcement Pricing Details

Quantity	Individual Items	Cost to School	Cost to Student 2017
1	Engraved Personalized Announcement	\$1.10	\$1.97
1	Photo Announcement	\$1.10	\$1.97
5	Engraved Personalized Announcements	\$5.50	\$9.85
5	Photo Announcements	\$5.50	\$9.85
25	Engraved Personalized Announcements	\$27.50	\$9.25
25	Photo Announcements	\$27.50	\$49.25
1	Announcement cover	\$6.95	\$13.00
25	Envelope Seals	\$4.65	\$10.00
25	Thank You Notes	\$6.75	\$13.00
50	Return Address Labels	\$8.70	\$18.00
1	Certificate of Appreciation/Cover	\$11.95	\$20.00

### **Package A** **\$88.20** **\$166.45**

50 announcements  
50 thank you notes  
50 return address labels  
50 envelope seals  
1 announcement cover








### **Package B** **\$65.50** **\$123.10**

35 announcements  
35 thank you notes  
50 return address labels  
50 envelope seals  
1 announcement cover

### **Package C** **\$51.55** **\$94.20**

25 announcements  
25 thank you notes  
50 return address labels  
25 envelope seals  
1 announcement cover






Please note that retail pricing includes trademark licensing fees paid to the University.

balfour   gifts		Collegiate Price List, Effective April 1, 2017			
CONFIDENTIAL					
Leather Goods	Leather: Brown & Black Premium Harness Leather Lining: Khaki Fabric Packaging: Retail Quality Gift Box w/ Balfour Logo Deboss: Initials OR School Logo	Wholesale	MSRP	Commission %	Commission \$
	Signature Rollerball Pen				
	Signature Rollerball Pen - Black	\$37.50	\$50.00	25%	\$12.50
	Signature Rollerball Pen - Gunmetal	\$37.50	\$50.00	25%	\$12.50
	Key Fob				
	Premium Sierra Leather - Brown	\$30.00	\$40.00	25%	\$10.00
	Premium Sierra Leather - Black	\$30.00	\$40.00	25%	\$10.00
	Multi-Card Case				
	Premium Sierra Leather - Brown	\$33.75	\$45.00	25%	\$11.25
	Premium Sierra Leather - Black	\$33.75	\$45.00	25%	\$11.25
	Money Clip Wallet				
	Premium Sierra Leather - Brown	\$37.50	\$50.00	25%	\$12.50
	Premium Sierra Leather - Black	\$37.50	\$50.00	25%	\$12.50
	Ditty Bag				
	Premium Bridle Leather - Brown	\$37.50	\$50.00	25%	\$12.50
	Premium Bridle Leather - Black	\$37.50	\$50.00	25%	\$12.50
	Luggage Tag				
	Premium Sierra Leather - Brown	\$37.50	\$50.00	25%	\$12.50
	Premium Sierra Leather - Black	\$37.50	\$50.00	25%	\$12.50
	Passport Case				
	Premium Sierra Leather - Brown	\$37.50	\$50.00	25%	\$12.50
	Premium Sierra Leather - Black	\$37.50	\$50.00	25%	\$12.50

Balfour Gifts Bags and Accessories






	<b>Pocket Flip Wallet</b>				
	<i>Premium Sierra Leather - Brown</i>	\$37.50	\$50.00	25%	\$12.50
	<i>Premium Sierra Leather - Black</i>	\$37.50	\$50.00	25%	\$12.50
	<b>Snap Tray</b>				
	<i>Premium Sierra Leather - Brown</i>	\$37.50	\$50.00	25%	\$12.50
	<i>Premium Sierra Leather - Black</i>	\$37.50	\$50.00	25%	\$12.50
	<b>Glasses Case</b>				
	<i>Premium Sierra Leather - Brown</i>	\$37.50	\$50.00	25%	\$12.50
	<i>Premium Sierra Leather - Black</i>	\$37.50	\$50.00	25%	\$12.50
	<b>Key Ring Snap Wallet</b>				
	<i>Premium Sierra Leather - Brown</i>	\$37.50	\$50.00	25%	\$12.50
	<i>Premium Sierra Leather - Black</i>	\$37.50	\$50.00	25%	\$12.50
	<b>Journal Cover (with refillable notebook)</b>				
	<i>Premium Sierra Leather - Brown</i>	\$56.25	\$75.00	25%	\$18.75
	<i>Premium Sierra Leather - Black</i>	\$56.25	\$75.00	25%	\$18.75
	<b>Snap Frame</b>				
	<i>Premium Sierra Leather - Brown</i>	\$56.25	\$75.00	25%	\$18.75
	<i>Premium Sierra Leather - Black</i>	\$56.25	\$75.00	25%	\$18.75
	<b>Binoculars and Case</b>				
	<i>Premium Sierra Leather - Brown</i>	\$56.25	\$75.00	25%	\$18.75
	<i>Premium Sierra Leather - Black</i>	\$56.25	\$75.00	25%	\$18.75
	<b>Traveler's Organizer</b>				
	<i>Premium Sierra Leather - Brown</i>	\$63.75	\$85.00	25%	\$21.25
	<i>Premium Sierra Leather - Black</i>	\$63.75	\$85.00	25%	\$21.25

Balfour Gifts Bags and Accessories

balfour.   gifts		Collegiate Price List, Effective April 1, 2017			
CONFIDENTIAL					
Ballistic Nylon Items	<div>Custom : Item Made to Order</div> <div>Exterior: Custom Printed Fabric (2 color choices on 8 designs) w/Chocolate Milan Vegan Leather Trim Lining: Khaki Fabric</div> <div>Packaging: Non-Woven Fabric Pullstring Pouch w/ Balfour Logo</div> <div>Deboss: Initials OR School Logo</div>	Wholesale	MSRP	Commission %	Commission \$
	Luggage Handle Wrap				
	Milan Leather w/Custom Printed Fabric	\$26.25	\$35.00	25%	\$8.75
	Tech Cord Wraps in Travel Pouch				
	Milan Leather w/Custom Printed Fabric	\$33.75	\$45.00	25%	\$11.25
	Passport Case				
	Milan Leather w/Custom Printed Fabric	\$33.75	\$45.00	25%	\$11.25
	Travel Accessories Pouch				
	Milan Leather w/Custom Printed Fabric	\$37.50	\$50.00	25%	\$12.50
	Glasses Case				
	Milan Leather w/Custom Printed Fabric	\$37.50	\$50.00	25%	\$12.50

Balfour Gifts Bags and Accessories



	<b>Snap Tray</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$37.50	\$50.00	25%	\$12.50
	<b>Laptop/Tablet Sleeve</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$48.75	\$65.00	25%	\$16.25
	<b>Toiletries Kit</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$63.75	\$85.00	25%	\$21.25
	<b>Crossbody Pouch</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$75.00	\$100.00	25%	\$25.00
	<b>Crossbody Wristlet</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$82.50	\$110.00	25%	\$27.50

Balfour Gifts Bags and Accessories

	<b>All-Day Tote Bag</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$112.50	\$150.00	25%	\$37.50
	<b>Zippered All-Day Tote Bag</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$112.50	\$150.00	25%	\$37.50
	<b>All-Day Back Pack</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$112.50	\$150.00	25%	\$37.50
	<b>Thin Laptop Brief</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$120.00	\$160.00	25%	\$40.00
	<b>Workout Duffel Bag</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$150.00	\$200.00	25%	\$50.00
	<b>Travel Duffel Bag</b>				
	<i>Milan Leather w/Custom Printed Fabric</i>	\$187.50	\$250.00	25%	\$62.50

Balfour Gifts Bags and Accessories



# VCU



## SECTION V

REQUEST FOR PROPOSAL 7629420BA  
VIRGINIA COMMONWEALTH UNIVERSITY  
SERVICE TEAM

**balfour**<sup>®</sup>

## SERVICE TEAM FOR VIRGINIA COMMONWEALTH UNIVERSITY



### **NATHAN LAVINKA, DIRECTOR OF COLLEGIATE MARKET DEVELOPMENT**

Nathan received a dual degree in marketing and communications from Virginia Tech. While there, he served on the ring design committee and led the team in celebrating the 100th ring design at VT. He was instrumental in getting a ring statue secured in their student union. Nathan has a creative mindset and is eager to help schools think outside of the box about their ring programs and thrives in assisting dynamic groups. He resides in Richmond, VA.

### **MICHAEL FOLTZ, REGIONAL SALES MANAGER**

Mike has been providing superior customer service as a Balfour Representative in Virginia for over 15 years. He currently manages the Balfour College Sales Teams in Virginia, Maryland and Washington, DC. A lifetime resident of the State of Virginia, Mike is a 1993 graduate of Virginia Tech and currently lives in Chesterfield, VA.

### **MARIAN KANE - TERRITORY ASSOCIATE**

Marian began her career at Balfour in 2001 as a part-time promotion specialist. During her tenure Marian has been responsible for several facets of the business from customer service, promotional sales, as well as training product knowledge to new hires. She was eager to learn and quickly earned the confidence of her customers. Marian has a vast amount of product and sales experience. Over the years she has serviced some of the largest and most prestigious programs such as VMI, Virginia Tech and University of Virginia to name a few. Marian truly believes in the need for graduation products and the value they provide.



#### **DAN MURPHY – REGIONAL VICE PRESIDENT OF SALES**

Based in Atlanta, Dan is responsible for all collegiate sales activity in the Southeast US. He is a 1986 graduate of Wake Forest University with a BS in Business. After graduation Dan had a successful career in consumer packaged goods sales and marketing beginning with General Mills, Inc. and later working in the sporting goods sector for Maxfli, TaylorMade, and finally with Bridgestone Golf as Executive Vice President of Sales and Marketing. Dan joined Balfour in 2016 and is excited to help the company create the next chapter of its long and illustrious history.



#### **CURT LANGFORD, VICE PRESIDENT OF COLLEGIATE MARKET DEVELOPMENT**

Curt received his bachelor's degree in public relations and marketing, and his master's degree in interdisciplinary studies from Texas Tech University. Curt leads our Official Ring Program at Balfour. Prior to joining the Balfour team in 2000, he worked at Texas Tech where in 1998 he was instrumental in establishing one of the more successful ring traditions in the country. With a twelve-year background in alumni relations, he has since assisted many colleges and universities in launching and developing their official ring programs. Curt coordinates Balfour's Official Ring Workshops that have been attended by more than 250 campus administrators from more than 100 colleges and universities. Participants have included alumni, auxiliary, bookstore, licensing and student affairs professionals.



#### **CHRIS BARR, VICE PRESIDENT OF GRADUATION PRODUCTS**

Chris Barr has been in the Commencement industry since 1985. He has sold graduation announcements and related products across the country, serving more than 400 colleges and universities. The key feature in his success has been the 24 hour turn around on all personalized announcement orders with his team of announcement specialists providing the industry standard for quality and customer service. He realizes the personal achievement each student has accomplished and makes that his number one focus



#### **MARY LIGNITZ, OPERATIONS MANAGER OF GRADUATION PRODUCTS**

Mary has been with CB Graduation Announcements and Balfour for 24 years. Beginning with Chris Barr when the personalized college announcements were in their infancy, she has participated in every aspect of this part of the industry and has been an integral part of its overall success. Overseeing a staff of highly qualified employees, the Manhattan office has developed an excellent reputation for outstanding customer service to students and Bookstores across the country.





**KIM ROSENMEIER, MARKETING MANAGER, COLLEGE RINGS & ANNOUNCEMENTS**

Kim has more than 20 years experience in consumer packaged goods. She graduated from Grove City College with a Bachelors Degree in Business Administration. Kim joined Balfour in 2001, bringing a great deal of retail experience to the company. Her background includes the development and implementation of trade marketing programs for retailers such as WalMart, K-mart, Sam's Club, Eckerd Drugs, Rite Aid, and Walgreen's. Kim has extensive experience in product development, brand management and consumer promotion.



**AARON FOX, MARKETING MANAGER, COLLEGE REGALIA**

In 1998 Aaron began working with University Cap & Gown in the warehouse and on-site service operations. He quickly moved within the company to become Asst. Warehouse and Distribution Manager and on to become the VP of College Sales in 2007. During this time he identified a need for, and developed an industry leading online registration system for faculty and graduates and executed a company-wide green initiative. After the merger of the companies, Aaron was quickly identified as a key asset and promoted to the Marketing Manager for College Regalia. Aaron has worked servicing college accounts and developing processes and procedures to enhance the customer experience. He is always eager to hear ideas that we can evolve with our customers to provide better service and programs.



**DEBBE MARTINEZ, DIRECTOR OF CUSTOMER AND ORDER SERVICES**

Debbe has been with Balfour for more than 30 years. In that time, she has managed and led numerous teams with a strong focus on service. Debbe takes the proven approach of investing in people and improving processes to create stability and growth. We exist because of our customers, but our success depends on our employees' tireless commitment to our customers.



**TODD BELL, VICE PRESIDENT OF MANUFACTURING**

Todd offers more than 29 years of experience in manufacturing. Having joined Balfour in 1988, his experience has been in the Class Ring and Varsity Lettermen Jacket business. During that time his responsibilities have included Lean Manufacturing, Engineering, Production Control, New Product Development, and all areas of Manufacturing Management. He currently oversees the Austin and Waco manufacturing facilities where he has direct responsibility for all production of rings, award jackets and patches for all markets.



# VCU



## SECTION VI

REQUEST FOR PROPOSAL 7629420BA  
VIRGINIA COMMONWEALTH UNIVERSITY  
BALFOUR REFERENCES

**balfour**®



### BALFOUR NATIONAL TRADITION REFERENCES

	School	Reference Name/Title	Phone
	Clemson University	Randy Boatwright, Director of Business Development Clemson Alumni Association	864-656-5671 brandol@clemson.edu
	Florida State University	Mary Coburn Vice President Student Affairs	850-644-5590 mccoburn@admin.fsu.edu
	Georgia Tech University	Holly Green Business Development Manager Alumni Association	404-894-0765 holly.green@alumni.gatech.edu
	North Carolina State University	Benny Suggs Executive Director, Associate Vice Chancellor for Alumni Relations	919-515-0517 benny_suggs@ncsu.edu
	Syracuse University	Gale Youmell Bookstore Manager Syracuse Bookstore	315-443-9900 gayoumel@syr.edu
	University of North Carolina	Douglas Dibbert President and Director Alumni Affairs	919-962-7050 doug_dibbert@unc.edu
	University of Notre Dame	David Werda, Hammes Notre Dame Bookstore Director	574-631-9712 dwerda@nd.edu
	University of Pittsburgh	Melissa Hiller Merchandise Manager The Book Center	412-648-1468 Mhiller@bc.pitt.edu
	University of Virginia	Patte Daves Managing Director of Business Development UVA Bookstores	434-243-9020 pad3b@virginia.edu
	Virginia Tech	Laura Wedin Alumni/Student Programs Director Virginia Tech Alumni Association	540-231-6285 lwedin@vt.edu
	Northwestern University	Caitlin Wyler, Associate Director of Student to Alumni Transition Alumni Relations & Development	847-467-3571 caitlin.wyler@northwestern.edu
	The Ohio State University	Lauren Luffy, Associate Director of Mentoring & Engagement Ohio State Alumni Association	614-292-2200 luffy.2@osu.edu
	Purdue University	Jimmy Cox Director of Student Alumni Programs Purdue University Alumni Association	765-496-6549 jimmycox@purdue.edu
	University of Maryland	Jessica Roberts, Associate Executive Director of Membership and Business Development University of Maryland Alumni Association	301-405-7081 robert3@umd.edu
	University of Michigan	Cheryl Hollowood Bookstore Manager Barnes & Noble at U of Michigan	734-995-8877 sm743@bncollege.com

## BALFOUR NATIONAL TRADITION REFERENCES

	School	Reference Name/Title	Phone
	Baylor University	Jan Dodd Asst. Director for Special Events & Programs Baylor Network	254-710-8300 jan.dodd@baylor.edu
	Iowa State University	Scott Dahl Director of Marketing & Membership ISU Alumni Association	515-294-9599 sjdahl@iastate.edu
	Kansas State University	Amy Button Renz President & CEO K-State Alumni Association	800-600-2586 arenz@k-state.com
	Texas Tech University	Bill Dean Executive Vice President & CEO Texas Tech Alumni Association	806-742-3641 bill.dean@ttu.edu
	University of Texas	Summer Chandler Marketing Coordinator Texas Exes Alumni Association	512-840-5627 summer.chandler@texasexes.org
	Auburn University	Corey Edwards Student Involvement Director Student Affairs	334-750-0298 edwarcm@auburn.edu
	Louisiana State University	Asheley Territo Manager of Operations Finance & Administration	225-578-4342 aterrito@lsu.edu
	Mississippi State University	Jeff Davis Executive Director Mississippi State Alumni Association	662-325-3444 jdavis@alumni.msstate.edu
	Texas A&M University	Porter Garner Executive Director The Association of Former Students	979-845-7514 porter-garner@tamu.edu
	University of Alabama	Mandy Johnson Sr. Associated Director Licensed Products U of Alabama Supply Store	205-348-8449 amjohnson@fa.ua.edu
	University of Georgia	Julie Cheney Associate Director of Alumni Programs UGA Alumni Association	706-542-4802 jcheney@uga.edu
	University of South Carolina	Jack W. Claypoole Executive Director USC Alumni Association	803-777-4113 jclaypoole@mycarolina.org
	Vanderbilt University	Lauren Obersteadt Executive Director Alumni and Student Engagement	615-322-2042 lauren.obersteadt@vanderbilt.edu

I cannot thank you enough for the beautiful commencement robes you created for WPI. Despite the fact that we changed our minds at least 5 times about the color and design, you were always positive about your willingness and ability to deliver. Every deadline was met by Balfour (previously University Cap and Gown) and you and your staff went out of your way to respond to our financial as well as our aesthetic requirements.

The gowns are beautiful. The fabric, details and workmanship are superior to any other gowns we have used. Your recommendation regarding WPI emblems on the gowns was met with tremendous support.

I would highly recommend Balfour to any other college or university. I look forward to a long working relationship.

***Janet Begin Richardson***  
***Vice President for Student Affairs and Campus Life***  
***Worcester Polytech Institute***

I do hope that you received my e-mail to you sometime in May thanking you both so very much for coming through for me once again. This time it was a custom made gown for Bill Russell for our Commencement! I'm not sure we will ever use that gown again but did need it for him - he is 6'11"! It fit him beautifully! Again, thank you for everything you always help me with whenever I ask!! You are wonderful!

***Jacqueline M. Parker***  
***Suffolk University President's Office***

Over 20 years ago I got Harvard doctoral robes at the Coop. They were made by a company based in Chicago and they were a fuschia color that always bothered me - not really crimson. Yesterday I got my new doctoral cap & gown and I want to tell you how pleased I am. The fabric is a higher quality, the tailoring is neater and more detailed, the gown has a zipper rather than two flimsy buttons, and the color is a vivid crimson! What's truly amazing is that they also cost less in actual dollars than my original regalia.

Thank you so much.

***Suzanne Kena, PhD***  
***Harvard GSAS 1990***

I just received an e-mail from a VLS student and wanted to send along my thanks. Lindsay's note about the good service she received from you comes as no surprise, but it's certainly appreciated. Thank you for the top notch customer service that we receive from Balfour time and time again - it's a pleasure doing business with you.

***Kimberly J. Evans***  
***Alumni Relations Manager***  
***Vermont School of Law***

I just wanted to thank you again for your help on the gold gowns and tam rentals. I really appreciate all the help that you and all the people I work with at Balfour have extended to me. I will be contacting you when it comes time for us to get pricing for the student keeper gowns for next year.

Again, thank you and all the staff at Balfour for the wonderful job you all are doing!

***Jann Stahl***  
***University of Massachusetts - Dartmouth***



# VCU



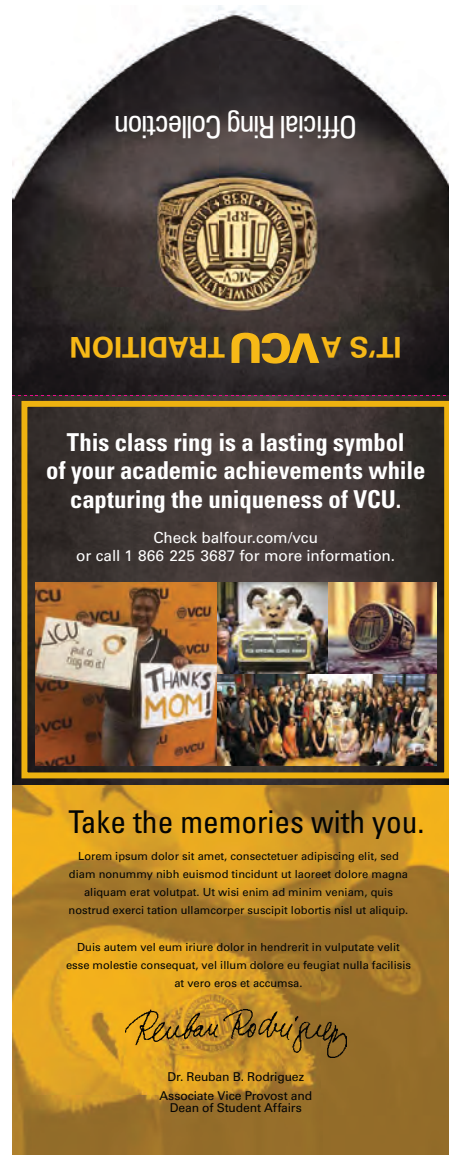
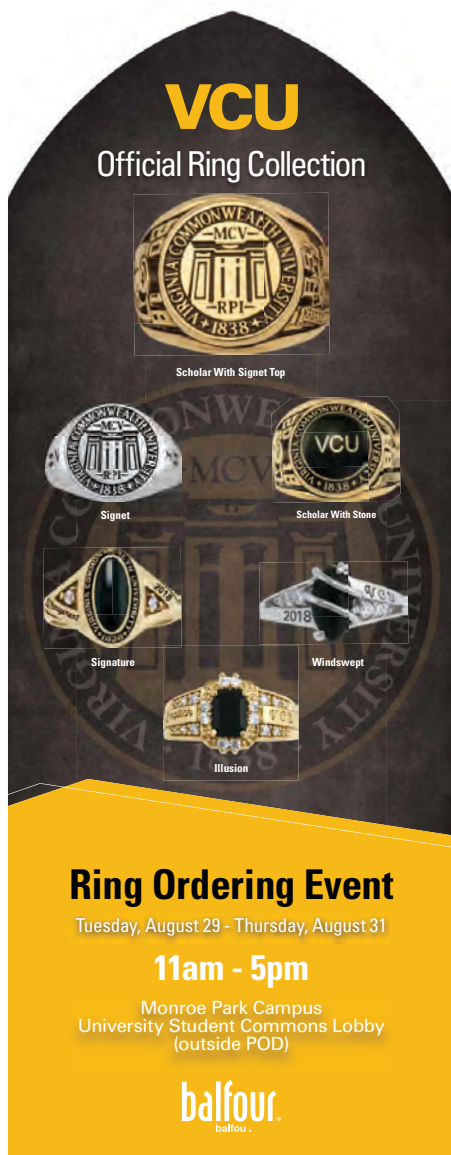
## SECTION VII

REQUEST FOR PROPOSAL 7629420BA  
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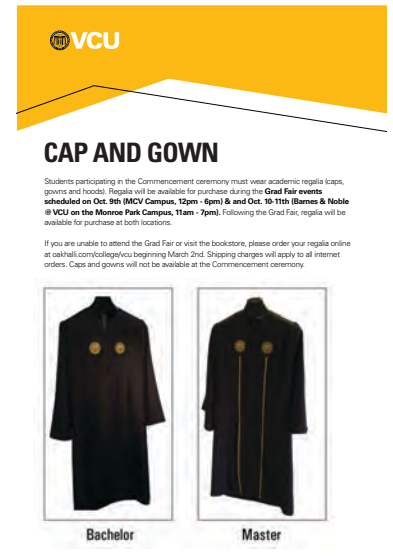
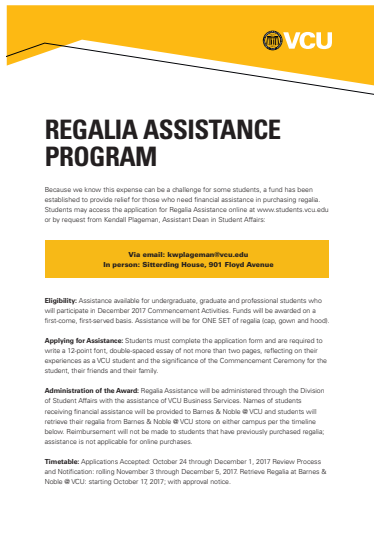
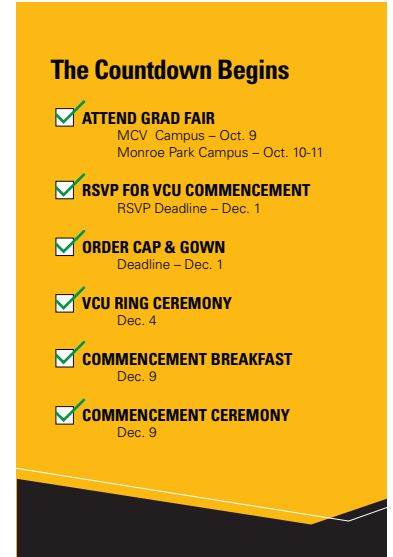
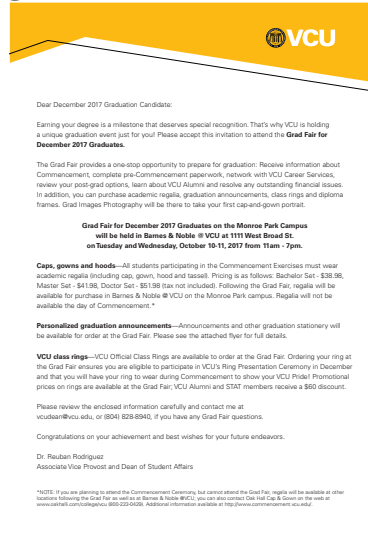
## EXAMPLES OF TRI-FOLD BROCHURE REDESIGN



## EXAMPLES OF POSTER REDESIGN



# EXAMPLES OF GRAD FAIR MAILER REDESIGN





## EXAMPLES OF SOCIAL MEDIA REDESIGN









# HOW TO WEAR YOUR REGALIA



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**1 Put hood on over head.**

Velvet side will be up, and small tapered end will be in front.

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**2 Before closing gown, loop cord over shirt/blouse button under gown.**

This keeps the hood from riding against the wearer's neck.

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**3 Secure the cord across the back of the hood to keep the hood together.**

Do NOT wrap the cord behind the hood.

---

**4 Turn out lining colors of hood.**

Doctor, Master and Bachelor Hoods are all worn in the same manner.

**balfour**

## EXAMPLE OF HOW TO WEAR REGALIA FLYER



# HOW TO WEAR YOUR REGALIA




- 1 Put hood on over head.**  
Velvet side will be up, and small tapered end will be in front.
- 2 Before closing gown, loop cord over shirt/blouse button under gown.**  
This keeps the hood from riding against the wearer's neck.
- 3 Secure the cord across the back of the hood to keep the hood together.**  
Do NOT wrap the cord behind the hood.
- 4 Turn out lining colors of hood.**  
Doctor, Master and Bachelor Hoods are all worn in the same manner.



**GRADUATION ACCESSORIES**


## CLASS RINGS: A VCU TRADITION



Purchase your class ring during VCU's Grad Fair events on  
**Oct. 9th on the MCV Campus and Oct. 10-11th on the Monroe Park Campus.**  
STAT members and VCU alumni save \$60 on class rings.  
Class ring informational brochures are available any time in the bookstores.

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## GRADUATION ANNOUNCEMENTS



Standard and personalized graduation announcements are available. Standard announcements include two envelopes and a blank name card. Personalized announcements incorporate the graduate's name, degree & major.

For class ring ordering information, please visit [balfour.com](http://balfour.com) or call (866) 225-3687 (BALFOUR). For graduation announcement information, visit [www commencement.vcu.edu/Graduation-Info/#announce](http://www commencement.vcu.edu/Graduation-Info/#announce).

