

THE UNIVERSITY OF  
MONTEVALLO REQUEST  
FOR PRICE QUOTATION

Bid #25004

SPECIAL NOTICE TO  
VENDOR

We reserve the right to purchase all or part of materials and/or services listed and to reject any and all bids or any portion thereof. Brand names, catalog numbers, etc., are used to indicate levels of quality only and are not intended to restrict bids or bidders. To receive consideration, the second copy of this inquiry with your bid filled in, must be signed and returned 10/3/2025. Bids made out in pencil will not be accepted. Attach complete specifications for any substitutions offered or when amplification is desirable or necessary. Any attachments become a part of this inquiry and must be signed by the bidder. If you cannot furnish any of the items listed, please return this inquiry marked **NO BID** and give any information to update your listing in our records. Please furnish us with your quotation on the items enumerated.

THE UNIVERSITY OF MONTEVALLO IS AN INSTRUMENTALITY OF THE STATE AND IS FEDERAL, STATE, AND LOCAL TAX EXEMPT

<u>Quantity</u>	<u>DESCRIPTION OF ARTICLE</u>
One position	Search Consultant ✓ See attached pages 8-12 for the scope of work and terms. ✓ Please use attached scope of work for your price quotation. If you have any questions regarding specifications, please contact Dr. Kristen Gilbert at GilbertK@montevallo.edu

**NOTE:**

- 1) **Bid must be notarized prior to submission in order to be considered valid.**
- 2) **Bid should be returned in duplicate.**
- 3) **Bids should also be submitted on a flash drive. The flash drives will not be returned.**

All bids must comply with the State Bid Law. The successful bidder may be required to furnish a performance bond in the amount of 100% and not less than 50% of the contract price.

The furnishing of materials, supplies, equipment, or services to the University of Montevallo under this purchase order, contract, solicitation for bids, or construction specification constitutes assurance by the vendor or contractor of his compliance with applicable provisions of and pertinent regulations promulgated under Executive Order 11246, issued by the President of the United States of America, and Public Law 88-352, 88th Congress, the "Civil Rights Act of 1964."

**CERTIFICATION PURSUANT TO ACT**

Alabama law (section 41-4-116, code of Alabama 1975) provides that every bid submitted and contract executed shall contain a certification that the vendor, contractor, and all of its affiliates that make sales for delivery into Alabama or leases for use in Alabama are registered, collecting, and remitting Alabama state and local sales, use, and/or lease tax on all taxable sales and leases into Alabama. By submitting this bid, the bidder is hereby certifying that they are in full compliance with act no. 2006-557, they are not barred from bidding or entering into a contract pursuant to 41-4-116, and acknowledges that the awarding authority may declare the contract void if the certification is false.

**INSTRUCTIONS TO BIDDER:**

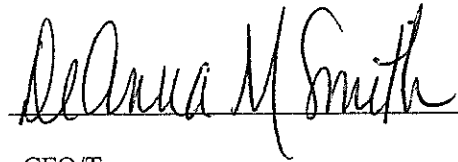
All bids will be sealed with notation on front of envelope Sealed Bid # **25004** due **10/03/2025**, and

Forward to: The University of Montevallo  
75 College Dr.  
Station #6010, Calkins Hall  
Montevallo, AL 35115

**Keep this copy for your files.**

**Return the second copy as your quotation.**

The University of Montevallo



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CFO/Treasurer

THE UNIVERSITY OF  
MONTEVALLO REQUEST  
FOR PRICE QUOTATION

Bid #25004

TO: «Contact»  
«Company»  
«Address1»  
«Address2»

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One position	Search Consultant ✓ See attached <b>pages 8-12</b> for scope of work and terms. ✓ Please use attached scope of work for your price quotation. If you have any questions regarding specifications, please contact Dr. Kristen Gilbert at <a href="mailto:GilbertK@montevallo.edu">GilbertK@montevallo.edu</a>

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If we receive your order, we agree to furnish the items listed hereon at the price and under the conditions and terms listed.

**THIS BID MUST BE NOTARIZED BELOW**  
**Bid should be returned in duplicate**

Company: «Contact»  
«Company»  
«Address 1»  
«Address2»

Signed: \_\_\_\_\_  
Name  
  
\_\_\_\_\_  
Title  
  
\_\_\_\_\_  
Company Phone Number

I hereby affirm I have not been in any agreement or collusion among bidders or prospective bidders in restraint of freedom of competition, by agreement to bid at a fixed price or to refrain from bidding, or otherwise.

Sworn to and subscribed before me this \_\_\_\_\_ day  
of \_\_\_\_\_, 20 \_\_\_\_\_.

( SEAL )

\_\_\_\_\_  
Notary Public

# State of Alabama

## Disclosure Statement

(Required by Act 2001-955)

ENTITY COMPLETING FORM	
ADDRESS	
CITY, STATE, ZIP	TELEPHONE NUMBER ( )
STATE AGENCY/DEPARTMENT THAT WILL RECEIVE GOODS, SERVICES, OR IS RESPONSIBLE FOR GRANT AWARD	
ADDRESS	
CITY, STATE, ZIP	TELEPHONE NUMBER ( )

This form is provided with:

- Contract     
  Proposal     
  Request for Proposal     
  Invitation to Bid     
  Grant Proposal

Have you or any of your partners, divisions, or any related business units previously performed work or provided goods to any State Agency/Department in the current or last fiscal year?

- Yes     
  No

If yes, identify below the State Agency/Department that received the goods or services, the type(s) of good or services previously provided, and the amount received for the provision of such goods or services.

STATE AGENCY/DEPARTMENT	TYPE OF GOODS/SERVICES	AMOUNT RECEIVED

Have you or any of your partners, divisions, or any related business units previously applied and received any grants from any State Agency/Department in the current or last fiscal year?

- Yes     
  No

If yes, identify the State Agency/Department that awarded the grant, the date such grant was awarded, and the amount of the grant.

STATE AGENCY/DEPARTMENT	DATE GRANT AWARDED	AMOUNT OF GRANT

1. List below the name(s) and address(es) of all public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

NAME OF PUBLIC OFFICIAL/EMPLOYEE	ADDRESS	STATE DEPARTMENT/AGENCY

2. List below the name(s) and address(es) of all family members of public officials/public employees with whom you, members of your immediate family, or any of your employees have a family relationship and who may directly personally benefit financially from the proposed transaction. Identify the public officials/public employees and State Department/Agency for which the public officials/public employees work. (Attach additional sheets if necessary.)

NAME OF FAMILY MEMBER	ADDRESS	NAME OF PUBLIC OFFICIAL/ PUBLIC EMPLOYEE	STATE DEPARTMENT/ AGENCY WHERE EMPLOYED
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If you identified individuals in items one and/or two above, describe in detail below the direct financial benefit to be gained by the public officials, public employees, and/or their family members as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

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Describe in detail below any indirect financial benefits to be gained by any public official, public employee, and/or family members of the public official or public employee as the result of the contract, proposal, request for proposal, invitation to bid, or grant proposal. (Attach additional sheets if necessary.)

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List below the name(s) and address(es) of all paid consultants and/or lobbyists utilized to obtain the contract, proposal, request for proposal, invitation to bid, or grant proposal:

NAME OF PAID CONSULTANT/LOBBYIST	ADDRESS
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By signing below, I certify under oath and penalty of perjury that all statements on or attached to this form are true and correct to the best of my knowledge. I further understand that a civil penalty of ten percent (10%) of the amount of the transaction, not to exceed \$10,000.00, is applied for knowingly providing incorrect or misleading information.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Notary's Signature Date Date Notary Expires

*Act 2001-995 requires the disclosure statement to be completed and filed with all proposals, bids, contracts, or grant proposals to the State of Alabama in excess of \$5,000.*



**CERTIFICATION OF COMPLIANCE  
WITH SECTION NINE OF ACT 2011-535**

The undersigned officer of \_\_\_\_\_ (Company) certifies to the University of Montevallo that the Company shall not knowingly employ, hire for employment, or continue to employ an unauthorized alien and does attest to such by sworn affidavit signed before a notary. Furthermore, the Company certifies that it has provided its one-page E-Verify Company Profile Document to the University. During the performance of the contract, the Company shall participate in the E-Verify Program and shall verify every employee that is required to be verified according to the applicable federal rules and regulations. The Company also certifies that it will obtain sworn affidavits signed by a notary from any subcontractors furnishing goods/services under this contract attesting to the fact that they do not employ, hire for employment, or continue to employ an unauthorized alien and that they participate in the E-Verify Program and verify every employee that is required to be verified according to the applicable federal rules and regulations.

\_\_\_\_\_  
PRINT COMPANY NAME

\_\_\_\_\_  
SIGNATURE OF COMPANY OFFICER

\_\_\_\_\_  
PRINT TITLE OF COMPANY OFFICER

\_\_\_\_\_  
DATE

Sworn and subscribed to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
NOTARY PUBLIC

My commission expires: \_\_\_\_\_

**University of Montevallo**  
*Presidential Search Consultant*  
*Bid # 25004 – Proposal Requirements*

**INTRODUCTION**

The University of Montevallo, an institution of higher learning in Montevallo, AL is accepting proposals from qualified executive search firms to serve as Consultant to the Board of Trustees for the identification and recruitment of prospective candidates and eventual hiring for the position of PRESIDENT.

The information provided is intended to assist firms to respond completely to this Request for Proposal. It is not intended to limit a proposal's content or to exclude any relevant or essential data. Firms are encouraged to include additional information that will substantiate their product quality and service capabilities.

*Note: Additional information regarding the University follows this scope of work in order to inform your proposal. Please review this request for proposal in its entirety.*

**PURPOSE**

The purpose of this RFP is to obtain information that will enable the University to select a Consultant to assist the University with the process of finding the next President. Consultants should have in-depth experience in executive placement services in higher education.

The objective of the RFP is to find and place an individual with the qualifications, skills, and emotional intelligence to provide the vision and strategic direction of the University over the next several years. There will be a search committee led by the Board Chair and comprised of board members, institutional representatives, and community stakeholders who will be the key members to identify and recommend final candidate. Input will also be gathered from college faculty, staff, and students who will have the opportunity to meet the final candidates.

*Upon initial review of responses, selection of finalists may occur. Selected finalists should be prepared to participate in inquiries and interviews via remote methods on October 22, 2025.*

**SEARCH FIRM QUALIFICATIONS**

The firm(s) must possess the following attributes at a minimum:

- Demonstrated track record of completing successful senior, executive -level searches in higher education.
- Evidence of conducting at least ten (10) successful searches of a similar nature in the last five (5) years.
- Recognized as a leader in academic executive searches in connection with academia or high-level positions at similar institutions or entities.
- Have available and capable staff to complete the search.

**PROPOSAL CONTENTS AND FORMAT**

Proposals should be of professional caliber in content and appearance. All descriptions and information should be clear, concise, and provide sufficient information to minimize questions and assumptions. The University accepts no financial responsibility for any costs incurred in the preparation of proposals. Upon receipt at the University, all proposals submitted in response to this RFP will become the property of the University.

**Minimum Requirements**

**Cover Letter.** Your proposal cover letter should be signed by an officer authorized to bind your firm contractually, state that the proposal is firm for a 60-day period from the proposal submission deadline, and provide the name, title, address, and telephone number of the individual to whom correspondence, inquiries, and other contacts should be directed during the selection process.

**Proposer Information.** This section should provide your firm's name, address, and telephone number, identify the individuals who will be involved in the representation, and contain a brief discussion demonstrating the proposer's understanding of the nature of the services requested.

**Capabilities and Experience.** It is the intent of the University to award a contract to the best qualified firm submitting a proposal that demonstrates substantial experience in providing executive search services of the kind required by the Board for the President's position. The proposal should:

- include an overview of the breadth and depth of the firm's professional resources, in particular as they relate to the scope of work and qualifications,
- include a description of similar assignments for which your firm or team has provided services in recent years,
- identify the search lead, their availability, strengths and history with the firm,
- identify the key team members and their proposed roles and responsibilities, and
- include résumés and/or biographies for all key team members.

**Services and Management Approach.** In this section, you should describe your approach to the delivery of services. In particular, your proposal should include:

- recommended number of consultations, format of consultation (remote versus on-campus), and estimated travel cost for consultants,
- your recommended timeline for conducting the search beginning no earlier than mid-November with constituent consultations,
- your approach to cost control,
- your approach to client communications and ongoing coordination,
- your approach to ensuring availability of key team members and meeting client needs in a responsive and timely manner, and
- description of guarantee, if any, in the event of an unsuccessful search.

**Cost Proposal.** Discuss your proposed fee arrangement.

- Provide a separate schedule of the hourly billing rates for team members (if applicable).
- Provide a "not to exceed" fixed fee by fiscal year including associated fees (e.g., printing costs, travel, attendance at meetings).
- Provide estimated budgets for both consultant and candidate travel.

**References.** Provide contact information for all public sector searches conducted in the past 3 years. References should include clients served by the search lead and key team members, and a brief description of the scope of work and search outcome (e.g., was a President successfully recruited, hired, and retained). For each search, provide complete contact information for the hiring institution and the successful candidate.

**Conflict of Interest.** This section should identify any familial or previous working relationships with the Board of Trustees and/or the President's Office as of the date of the proposal.

**University of Montevallo**  
*Presidential Search Consultant*  
*Bid # 25004 – Scope of Work*

1. **Search Committee** - The University will select an appropriate group of individuals to serve on the Search Committee that will work with the Firm to evaluate and make recommendations of highly qualified candidates for on-campus visits and ultimately for the hiring agent/s to make an offer of employment to the most qualified candidate. The Search Committee will utilize the University's applicant tracking software to assist them in the review and evaluation of the candidates.
2. **Develop Timeline for Search** - The Firm will propose to the Search Committee a timeline, beginning no earlier than mid-November, for conducting the Presidential Search from the initial phase of constituent consultation to the completion of the search.
3. **Conduct constituent consultations.** Obtain the view of various stakeholders of the University in a variety of formats (multiple sessions on campus, a minimum of one remote session, and an electronic survey).
4. **Develop Position Profile** - The Firm will prepare a position profile that will feature information regarding the University, the job description, qualifications, and the community and region where the University is located. The position profile must have final approval prior to any distribution by Trustee Matt Arnold and/or his designees.
5. **Applicant Packets** - The Firm will provide a list of materials to be included in applicant packets, which, once approved by the Search Committee, will be included as part of the advertisement and recruitment efforts for the position as set forth in paragraphs 6 and 7.
6. **Advertising of Presidential Search** - The Firm will distribute the position profile via email to appropriate individuals within the Firm's database, the Firm's website and advertisement sites as recommended by the Firm and selected by the University. All advertising for the position must be approved by Trustee Matt Arnold and/or his designees. Candidates will submit applications online to the University's Talent Management System.
7. **Candidate Recruitment** - The Firm will identify individuals within the Firm's database who may be qualified or have expressed interest in specific or similar positions, salary range, type of institutions or state or regions and meet the minimum position qualifications to make personal contact regarding the position. In addition, the Firm will also contact individuals in the Firm's database regarding nominations and recommendations for the position.
8. **Candidate Review** - The Firm will assist with reference checks, credential verification, and background checks in accordance with applicable law for semi-finalists.
9. **Interview Process** - The Firm will assist with and facilitate the interview process, including aiding in the proposed schedule of forums and interviews, development of suggested areas of questions and in the development of interview evaluation materials.
10. **Candidate Communications** - The Firm will provide a template of letters, including letters of rejection, and any other appropriate communications.
11. **Candidates Due Diligence Vetting Report** - The Firm will conduct and provide a complete vetting report of all candidates selected for a campus visit to the Search Committee. The report will include online database research, all articles or other writings by the candidate, corporate and limited partnership filings, verification of educational degrees via transcripts, professional licenses and regulatory filings, civil litigation, lien and judgement filings, criminal records, motor vehicle violations, credit history, local and national news media, and internet and social media platforms.
12. **Search Consultants** – Assign consultants to provide leadership for the Firm on this search. Other consultants from the Firm may be asked to assist the lead consultants with various aspects of the search.
13. **Failed Search** – The Firm will provide a plan for mitigating a failed search.

**Vendor should submit bid response in duplicate (2 copies) and electronic format via flash drive. Note: Flash drives will not be returned.**

\_\_\_\_\_  
Signature

*for*

\_\_\_\_\_  
Company

## **BACKGROUND**

Founded in 1896, the University of Montevallo is Alabama’s only public liberal arts university, located near the geographical center of the state in Montevallo, Alabama.

Its mission, unique in Alabama higher education, is to provide students from throughout the state an affordable, geographically accessible “small college” public higher educational experience of high quality with a strong emphasis on undergraduate liberal studies. UM offers professional programs supported by a broad base of arts and sciences, designed for their intellectual and personal growth, in pursuit of meaningful employment and responsible, informed citizenship.

UM’s vision is to offer undergraduate and graduate students a learner-centered 21st century education informed by its liberal arts identity.

Home to 2,600 total students, UM offers more than 45 undergraduate and 15 graduate degree programs across five distinct colleges: the College of Fine Arts, the College of Education and Human Development, the Michael E. Stephens College of Business and the Richard and Sandra Cummings College of Arts and Sciences. More than 90% of faculty hold a doctorate or terminal degree, and the average class size is 16.

UM is well known for its outstanding career development initiatives for undergraduate students, commitment to supporting military-related students and employees and providing its students with a well-rounded, practical education that prepares them for successful careers and lives.

UM has received numerous awards and honors, including ranking in the Top 10 Public Universities in the South and Top 10 Best Value Schools for 2025 by U.S. News & World Report, and being named to the 2025-2026 Colleges of Distinction list for the 14th consecutive year.

