REQUEST FOR PROPOSAL

Professional Recruitment Services

ID: RFP-25-20-01

Issued August 2, 2019

Responses due via email

by 4:30 pm CT on August 23, 2019

Please include RFP ID on all correspondence
# Table of Contents

I. Introduction ............................................................................................................................................................... 3

II. Description of SURS ................................................................................................................................................. 3

III. Services Required .................................................................................................................................................... 4

IV. Minimum Qualifications ........................................................................................................................................ 5

V. Proposal Content ...................................................................................................................................................... 6
   - Cover Letter .......................................................................................................................................................... 6
   - Statement of Minimum Qualifications ................................................................................................................. 6
   - References ............................................................................................................................................................ 6
   - Company Organization and Diversity Questionnaire ........................................................................................... 6
   - Fee Proposal ......................................................................................................................................................... 6
   - Contract ................................................................................................................................................................ 7
   - Recruitment Methodology ................................................................................................................................... 7
   - Use of Subcontractors .......................................................................................................................................... 7

VI. Submission of Proposals ....................................................................................................................................... 7

VII. Evaluation Process .................................................................................................................................................. 7
   - Pre-Evaluation Review .......................................................................................................................................... 7
   - Proposal Evaluation .............................................................................................................................................. 7

VIII. Anticipated Timeline and Contact Information ............................................................................................ 9

IX. Submission Process ................................................................................................................................................. 9
   - Deadline ................................................................................................................................................................ 9
   - Withdrawal ........................................................................................................................................................... 9
   - Questions .............................................................................................................................................................. 9

X. General Conditions ................................................................................................................................................ 10
   - Freedom of Information Act Disclosure.............................................................................................................. 10
   - Redacted Version of RFP Response .................................................................................................................... 10
   - Ordinary Course of Business Communications Allowed .................................................................................. 10
   - SURS Quiet Period Policy .................................................................................................................................... 11
   - Rights Reserved .................................................................................................................................................. 11
   - Equal Opportunity .............................................................................................................................................. 12
   - Terms and Conditions .......................................................................................................................................... 12

Appendix A: Statement of Minimum Qualifications .............................................................................................. 13
I. Introduction

The State Universities Retirement System (SURS or the System) is soliciting proposals from qualified and experienced professional search firms to provide recruitment services in order to expedite the hiring process for full-time position vacancies. The intent of this request for proposals (RFP) is to partner with one or more recruiting firms to provide high quality service, delivering highly qualified candidates for SURS to consider at a competitive cost per recruitment.

All forms/required documents needed for submitting an RFP are available on the SURS website at www.surs.org.

A proposer’s preparation and submittal of a proposal or subsequent participation in presentations or contract negotiations creates no obligation on the System to award a contract or to pay any associated costs. All proposals and related materials will be retained by the System and will be subject to disclosure as required in accordance with the Illinois Freedom of Information Act.

II. Description of SURS

SURS is the administrator of a cost-sharing, multiple employer, public employee retirement system that provides retirement, survivor, disability and death benefits to employees of Illinois state universities, community colleges, and certain other affiliated organizations and agencies. SURS was created in 1941, by an act of the Illinois General Assembly, and is governed by the Illinois Pension Code (40 ILCS 5/15-101 et seq.). SURS provides benefit services to over 230,000 members who work for 61 employers. SURS is responsible for investing assets of more than $19 billion in a diversified portfolio of U.S. and foreign stocks, bonds, real estate and alternative investments. SURS also administers a defined contribution plan, the Self-Managed Plan, which currently has assets of approximately $2.2 billion. Northern Trust serves as SURS’ master trustee custodian.

An elected and appointed, eleven-person, board of trustees, governs SURS. The chairperson of the board of trustees is, by statute, the chairperson of the Illinois Board of Higher Education. Five members of the board are appointed by the governor of the state of Illinois. The remaining six members of the board are elected by participating members (four individuals) and annuitants (two individuals). Trustees serve six-year terms. SURS is funded by participant payroll deductions and annual employer contributions provided by the state of Illinois. By statute, SURS is defined as a “body politic and corporate” created by Article 15 of the Illinois Pension Code.
SURNS currently employs approximately 148 staff, located in two offices in Champaign and Naperville, Illinois. Two SURS employees are in the Naperville office. The remaining SURS employees are currently situated in the Champaign office at 1901 Fox Drive, with approximately 50 existing staff members moving into a new SURS building at 1801 Fox Drive in mid-August.

A copy of SURS’ most recent comprehensive annual financial report (CAFR) is available for review, or to download, at www.surs.org.

The Illinois Governmental Ethics Act, 40 ILCS 420, provides guidelines for ethical practices concerning state and local pension plans. Respondent providers should be familiar with the provisions of this Act.

Section 1-109.1(6) of the Illinois Pension Code (40 ILCS 5/1-109.1(6)) encourages Illinois public pension systems like SURS to utilize businesses owned by "minorities," "women," and "persons with disabilities" for all contracts and services, as those terms are defined in the Business Enterprise for Minorities, Women and Persons with Disabilities Act ("BEMWPD",30 ILCS 575). Additionally, Section 1-109.1(10) of the Illinois Pension Code (40 ILCS 5/1-109.1(10)) sets an aspirational goal of not less than 20 percent of contracts awarded to such businesses for "information technology services," "accounting services," "insurance brokers," "architectural and engineering services," and "legal services" as defined by the BEMWPD. Accordingly, businesses that meet these definitions are strongly encouraged to submit responses to this RFP.

A section of the Illinois Procurement Code concerning prohibitions of political contributions for vendors, 30 ILCS 500/50-37, may or may not apply to SURS service providers. However, each service provider should be familiar with the provisions of this section and comply with this section if the service provider deems it appropriate.

SURS is subject to its own procurement statutes and rules. Responders should be familiar with those procurement requirements as well. The selected responder will be paid by SURS directly.

Additional legal requirements that vendors should be familiar with are contained in the Addendum to Contract under Appendix D.

Background specific to this RFP:

For the fiscal year beginning July 1, 2019, the SURS Board of Directors approved a plan for considerable expansion to the SURS workforce. This created a number of full-time vacancies that include but are not limited to professional leadership and information technology positions. We are evaluating the cost to engage professional recruiting firms to locate and recruit qualified and talented candidates on our behalf.

III. Services Required

The State Universities Retirement System is seeking qualified and experienced professional search firms to provide recruitment services. The intent of this RFP is to partner with one or more firms to provide high quality service, delivering highly qualified candidates for SURS to consider at a competitive cost per recruitment.

Positions of prime interest at this time:

1. Chief Diversity Officer
2. Procurement roles (Officer or Manager)
3. Manager of Enterprise Applications and Architecture
4. Business Analysts (3)
5. Project Managers (2)
6. Application Developers (3)
7. Data Analyst and Report Writer
8. Help Desk Analyst
9. System Administrator
10. System Operator

In support of IT recruitment, an overview of the current SURS technical environment can be found in Appendix G. Important to note – SURS is in the early stages of a significant digital transformation and modernization initiative. As such, our IT recruiting efforts are not limited to candidates with experience that align with legacy systems or applications.

**Desired recruitment services include but are not limited to:**

- Meet with SURS to obtain information regarding expectations, challenges, requirements and responsibilities of the position
- Develop a position profile and advertising plan based on previous successes with similar clients and positions.
- Spearhead a direct networking campaign to attract top talent, executing the advertising plan. This may include regional, in-state and local elements as determined during initial meetings with SURS
- Contact known potential candidates to encourage application
- Outreach to others in similar classifications for either application or referral of potential applicants
- Accept all applications
- Review and rate applicants
- Screen applicants, including face to face or video conference with viable candidates. Screening to include background, criminal and credit checks, references, and media checks to ensure finalists have backgrounds of the highest integrity.
- Deliver a list of the top candidates to be interviewed for each recruitment
- Coordinate and schedule candidate interviews with SURS personnel
- Manage each recruiter and recruitment through the process
- SURS may propose additional tasks as deemed necessary. Any additional services shall be compensated as agreed upon in the resulting contract with SURS.

**IV. Minimum Qualifications**

- The responder’s key professionals and/or organization must not have material conflicts with SURS or the SURS board.
- A minimum of five years with experience in the professional recruiting field
• A proven history of engagements of similar size and scope, with other government public sector clients

V. Proposal Content

At a minimum, the proposal must include the following information to be considered for the engagement. For ease of review, each requirement should be addressed separately. All communications regarding this RFP must include the RFP ID shown on the title page.

Cover Letter
A cover letter, which will be considered an integral part of the proposal package, in the form of a standard business letter, must be signed by an individual authorized to bind the proposer contractually. This cover letter must indicate the signer is so authorized and must indicate the signer’s title or position. An unsigned proposal will be rejected. The cover letter must also include:

a. A statement that the proposal meets all requirements of this RFP, and that the offer tendered by the proposal will remain in full force and effect until and may be accepted by Surs at any time prior to 30 days beyond the deadline for submittal.

b. A disclosure of any current business relationship or any current negotiations for prospective business with Surs, or with any member of the board of trustees or Surs staff, or any party currently rendering services to Surs.

c. A statement that the proposer acknowledges that all documents submitted in response to this RFP may be subject to disclosure under the Illinois Freedom of Information Act and/or the Illinois Open Meetings Act.

Statement of Minimum Qualifications
Proposers must complete and return the Minimum Qualifications Certification in the form contained in Appendix A.

References
Please provide at least three (3) references from prior engagements of similar size and scope of the services being requested by Surs. Reference checks will be conducted for each finalist. Please list the most significant engagements performed in the last three (3) years that are similar to the engagement listed in this RFP. References for information technology and/or similar professional recruitments are desirable.

Company Organization and Diversity Questionnaire
The questionnaire contained in Appendix B to this RFP must be completed and returned as part of the proposal.

Fee Proposal
Proposers must submit a fixed-cost proposal in the format prescribed in Appendix C. Any deviation from the prescribed format which in the opinion of Surs is material may result in the rejection of the proposal. The proposed fee shall include all costs and expenses for providing the services and equipment as described in this RFP, and any agreed-upon extended warranties that are associated with initial installation. Once finalists are selected, fees may be subject to a “best and final” offer process to be determined at the discretion of the System.

The fee proposal must expressly state that the proposed fees are guaranteed for the term of any resulting contract.
Contract
This request for proposal is neither a contract nor meant to serve as a contract. It is anticipated that one of the proposals submitted in response to this RFRP may be selected as the basis for negotiation of a contract with the proposer. Such a contract is presently contemplated to contain, at a minimum, the terms of the proposal submitted, as finally negotiated and approved by the System. SURS reserves the right to negotiate additions, deletions or modifications to the terms of proposals submitted. The terms contained in Appendix D, Addendum to Contract, must be agreed to and accepted by the candidate or organization selected to perform the work contemplated by this RFP, unless exceptions are noted as part of the proposer’s response. Any questions or exceptions to the terms and conditions and the sample contract included in Appendix F must be outlined as part of the proposer’s response. However, SURS is not required to accept the responder’s exceptions. Any exceptions noted in the proposer’s response will be addressed and discussed during the review process, but no changes will be made to the Addendum to Contract attached hereto unless the proposer and SURS both agree to include said changes in the final contract awarded under this RFP.

Recruitment Methodology
The submission should set forth a work plan, including an explanation of the methodology to be followed for services as described in Section III.

Use of Subcontractors
If any services are subcontracted to a third party, please indicate this clearly in your proposal.

VI. Submission of Proposals
All proposals must be received no later than the deadline stated in the Anticipated Timeline and Contact Information section. Submissions must be made via email to the identified contact person by the stated deadline. Only email submissions will be accepted.

The proposals become the property of SURS upon submission. All costs for developing proposals and attending presentations and/or interviews are entirely the responsibility of the proposer and shall not be chargeable to SURS.

Only one proposal from an individual, firm, partnership, corporation or combination thereof will be considered for this assignment.

VII. Evaluation Process
Pre-Evaluation Review
All proposals will be reviewed to determine if they contain all the required submittals specified in this RFP. Those not submitting all required information in the prescribed format will be rejected.

Proposal Evaluation
All proposals received by the SURS representative on or before the deadline listed above will be reviewed to determine whether they meet the minimum requirements of this RFP.

All proposals received by deadline and that pass the pre-evaluation review will undergo an evaluation process conducted by SURS staff. They will be reviewed to determine whether they meet the requirements of this RFP. SURS will consider the following factors in the evaluation process, ranked
in no specific order, and will render a decision based on the perceived best fit and best value for the engagement. Fees will be one of the determining factors in this decision but will not be the primary determinative. Proposals will be evaluated based on criteria including:

- Understanding of the services requested
- Timeline for recommended solution to be implemented
- Proposed methodology and work plan to be used in the process
- Proposed deliverables
- Relevant knowledge, experience and qualification of firm and team members including established record of success in similar work
- Commitment to diversity
- Willingness to negotiate contract terms
- Independence
- Cost
- Warranty
- References
- Adherence to RFP submission requirements

Proposals that contain false or misleading statements or that provide references which do not support an attribute or condition claimed by the proposer will be rejected. Issuance of the request for proposal creates no obligation to award a contract or to pay any costs incurred in the preparation of a proposal. Nothing in this RFP or any resulting contract shall preclude SURS from procuring services similar to those described herein from other sources.

During the evaluation process, proposers may be requested to provide additional information and/or clarify contents of their proposal. Other than information requested by SURS, no proposer will be allowed to alter the proposal or add new information after the filing date.

Once finalists are selected, fees may be subject to a “best and final” offer process to be determined at the discretion of the System.

Any responder selected by SURS will be subject to the terms of the SURS Travel Policy which are attached hereto as “Appendix E.” Vendors should be familiar with these terms as they will be included in any contract awarded by SURS. Responders may either include all expected travel costs as part of their overall “not to exceed” cost for the work to be performed under this RFP or they must provide their best estimate for all travel expenses they expect to incur in performing the services required by this RFP.
VIII. Anticipated Timeline and Contact Information

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quiet Period Begins</td>
<td>August 2, 2019</td>
</tr>
<tr>
<td>RFP Issued</td>
<td>August 2, 2019</td>
</tr>
<tr>
<td>Responder Questions Due</td>
<td>August 16, 2019, 4:30 p.m. CT</td>
</tr>
<tr>
<td>Responses to Questions Posted</td>
<td>August 20, 2019, 4:30 p.m. CT</td>
</tr>
<tr>
<td><strong>RFP Responses Due on or Before</strong></td>
<td>August 23, 2019 4:30 p.m. CT</td>
</tr>
<tr>
<td>Evaluations and Interviews</td>
<td>August 23 – 30, 2019</td>
</tr>
<tr>
<td>Anticipated Project Start</td>
<td>September 9, 2019</td>
</tr>
</tbody>
</table>

SURS may extend these deadlines at its discretion. Any such extensions will be posted to the SURS website.

**SURS RFP Contact Information**

Procurement Officer  
Procurement_Officer@surs.org  
SURS  
1901 Fox Drive  
Champaign, IL 61825-2710

IX. Submission Process

**Deadline**
To be considered for selection, proposals must be received via email in Adobe Acrobat format at Procurement_Officer@surs.org no later than 4:30 p.m. CT, August 23, 2019. Please reference the “Professional Recruiting Services RFP ID 25-20-01 Response - Name of Responder” in your communications. An email confirmation will be sent confirming receipt of the proposal.

**Withdrawal**
A proposal may be withdrawn any time prior to the deadline by written notification signed by the individual applicant or authorized agent of the firm and received at Procurement_Officer@surs.org no later than the deadline of 4:30 p.m. CT, August 23, 2019. Please reference the “Professional Recruiting Services RFP ID 25-20-01 Response - Name of Responder” in your communications. An email confirmation will be sent confirming withdrawal of the proposal. The proposal may be resubmitted with any modifications no later than the deadline. Modifications offered in any other manner will not be considered.

**Questions**
To clarify any issues in this request for proposal, SURS will respond only to questions that are presented in writing via email to Procurement_Officer@surs.org. All questions should be submitted to SURS by 4:30 p.m. CT, August 16, 2019. Please reference the “Professional Recruiting Services RFP ID 25-20-01 Response - Name of Responder” in your communications. These questions will be
consolidated into a single Q&A document and responded to by SURS on or about, August 20, 2019, by 4:30 p.m. CT. The Q&A document will be posted on the SURS web site at www.surs.org/rfp-non-investment. This document will include all questions received and SURS’ answers to the same without indicating the source of the query.

X. General Conditions

Freedom of Information Act Disclosure

All materials submitted in response to the RFP become property of SURS. Proposals remain confidential during the selection process. However, upon completion of the selection process, all responses, including that of the individual, vendor or firm selected, will be a matter of public information and will be open to public inspection in accordance with the state of Illinois Freedom of Information Act (FOIA).

If, in response to this RFP, trade secrets or commercial or financial information are furnished under a claim that they are proprietary, privileged or confidential and that disclosure of the trade secrets or commercial or financial information would cause competitive harm to the person or business responding to this RFP, such claim must be clearly made, and such information must be clearly identified. (5 ILCS 140/7 and 7.5) Responses to this RFP with every page marked as proprietary, privileged or confidential will not satisfy this requirement. Bidders are required to make a good faith attempt to properly identify only those portions of the response that are truly furnished under a claim that they are proprietary, privileged or confidential and that disclosure of the trade secrets or commercial or financial information would cause competitive harm to the person or business responding to this RFP.

Redacted Version of RFP Response

In the event the responder believes and claims that certain materials or information contained in the submitted response are exempt from public disclosure under the Illinois FOIA, the responder is required to provide a redacted version of the response it believes will be suitable for release under the Illinois Freedom of Information Act. (5 ILCS 140/7 and 7.5)

A RESPONDER’S FAILURE TO PROVIDE A REDACTED VERSION OF THE RFP WILL RESULT IN SURS DISCLOSING THE RESPONDER’S ENTIRE RFP RESPONSE IF THE SAME IS REQUESTED UNDER THE ILLINOIS FREEDOM OF INFORMATION ACT AND NEITHER THE RESPONDER NOR ANY THIRD PARTIES SHALL HAVE ANY RECOUSE AGAINST SURS FOR ITS DISCLOSURE OF THE NON-REDACTED RFP RESPONSE.

However, any claim of privilege from disclosure is not definitive. SURS has the right and legal obligation to determine whether such information is exempt from disclosure under the Illinois Freedom of Information Act and no information will be considered or determined by SURS to be proprietary, privileged or confidential unless it is identified and separated as indicated herein. (5 ILCS 140/7 and 7.5)

Ordinary Course of Business Communications Allowed

Other than existing normal business matters, respondents, potential respondents, or their representatives should not contact anyone at SURS (including SURS staff, members of the SURS advisory committees and members of the SURS board) other than the listed RFP contact. In addition, respondents must not discuss this RFP with any employee of SURS, trustee of SURS, employee of
SURS’ custodian, managers, legal counsel or other advisors or persons/entities having contracts or other affiliations with SURS.

**SURS Quiet Period Policy**
Please note the following Quiet Period Policy establishing guidelines by which the SURS Board of Trustees and SURS staff will communicate with prospective vendors or service providers during a search process. *The quiet period for this RFP began on the date the RFP was issued: August 2, 2019.*

1. The quiet period shall commence upon Committee action (or board action if the selection is not initiated through a Committee) to authorize a search for a service provider and end once a selection has been made by the board and accepted by the service provider;

2. Initiation, continuation and conclusion of the quiet period shall be publicly communicated via the SURS website (www.surs.org) to prevent inadvertent violations;

3. All board members, and SURS staff not directly involved in the search process, shall refrain from communicating with potential service providers regarding any product or service related to the search offered by the provider throughout the quiet period and shall refrain from accepting meals, travel, hotel, or other value from the providers;

4. Throughout the quiet period, if any board member or SURS staff member is contacted by a potential service provider, the board member or SURS staff member shall refer the provider to the SURS staff member directly involved in the search process;

5. All authority related to the search process shall be exercised solely by the relevant Committee or board as a whole, and not by individual board members;

6. All information related to the search process shall be communicated by SURS staff to the relevant Committee or board as a whole, and not to individual board members;

7. The quiet period does not prevent board approved due diligence, client conference attendance, or communications with an existing service provider that happens to be a provider in the ordinary course of services provided by such service provider; however, discussions related to the pending selection shall be avoided during those activities;

8. The provisions of this policy will apply to potential service providers throughout the quiet period and shall be communicated to providers in conjunction with any competitive proposal process; and

9. A potential service provider or vendor may be disqualified from a search process for a violation of the quiet period or any portion of this policy.

**Rights Reserved**
SURS reserves the right to amend any segment of the RFP prior to the announcement of a selected vendor/contractor. In such an event, all respondents will be afforded the opportunity to revise their proposals to accommodate the RFP amendment.

SURS reserves the right to remove any or all services from consideration for this contract. At its discretion, SURS may issue a separate contract for any service or groups of services included in this RFP. SURS may negotiate additional provisions to the contract awarded pursuant to this RFP.

SURS may request additional information from any or all bidders to assist in the evaluation of proposals, and SURS reserves the right to conduct background investigations of selected individuals or firms prior to awarding a contract under this RFP.

SURS does not bear any obligation to complete the RFP process or to select any individual(s) or firm(s). SURS also reserves the right without prejudice to reject any or all proposals submitted.
SURT will NOT reimburse any expenses incurred in responding to this RFP.

**Equal Opportunity**

SURT does not discriminate because of race, color, religion, creed, sex, sexual orientation, age, marital status, military status, certain unfavorable discharges from military service, political affiliation, citizenship, ancestry, national origin, physical or mental handicap or disability or any other characteristic protected by law. It is the System’s intent to comply with all state, federal, and local equal employment and opportunity laws and public policies.

**Terms and Conditions**

Following a review of submitted materials, if requested, selected individuals or organizations must be prepared to make a presentation or otherwise participate in an in-person interview in Champaign, IL or in Chicago, IL with SURT staff members and/or members of the SURT Board of Trustees at a date and location to be determined by SURT. SURT will not provide reimbursement for any costs incurred by the individuals or organizations associated with this presentation. Prior to the award of a contract pursuant to this RFP, selected individuals or firms must provide all requested documentation.
Appendix A: Statement of Minimum Qualifications

(Firm Name)certifies that it meets the following minimum qualifications.

Please initial each as applicable.

1. The responder’s key professionals and/or organization must not have material conflicts with SURS or the SURS board. _______

2. A minimum of five years experience in the professional recruiting field. _______

3. A proven history of engagements of similar size and scope, with other government public sector clients. _______

Signed: ___________________________ Date: ___________________________

Title: ___________________________
Appendix B: Company Organization and Diversity Questionnaire

The following questionnaire must be completed and included with your response to this RFP. Type your responses in the same order as the questionnaire, listing the question first followed by your answer.

Contact and Company Information:

Name of Individual / Organization: ____________________________________________
Mailing Address: ____________________________________________________________
City: ___________________ State: _______ Zip Code: ____ Phone: ____________
Fax: ____________________

Federal Employer Identification Number: ______________________________________

Contact Person(s):
Name:_____________________________ Phone:_____________________________ Title:__________
__________________________________________
Fax:_____________________________ Email:______________________________
Website: ____________________________

Organization Background:

1. Please provide a general description and history of the organization, its operations (please include any history of mergers and/or acquisitions), year founded, ownership structure, biographies of the principals and percentage ownership by current employees.

2. Provide a brief, descriptive statement detailing evidence of the respondent’s ability to deliver the goods or services sought under this RFP.

3. Is respondent a “Minority-owned business,” meaning a business which is at least 51% owned by one or more minority persons, or in the case of a corporation, at least 51% of the stock in which is owned by one or more minority persons; and the management and daily business operations of which are controlled by one or more of the minority individuals who own it? If so, please provide a detailed explanation.

4. Is respondent a “Female-owned business,” meaning a business which is at least 51% owned by one or more females, or, in the case of a corporation, at least 51% of the stock in which is owned by one or more females; and the management and daily business operations of which are controlled by one or more of the females who own it? If so, please provide a detailed explanation.

5. Is respondent a “Business owned by a person with a disability,” meaning a business that is at least 51% owned by one or more persons with a disability and the management and daily business operations
of which are controlled by one or more of the persons with disabilities who own it? A not-for-profit agency for persons with disabilities that is exempt from taxation under Section 501 of the Internal Revenue Code of 1986 is also considered a "business owned by a person with a disability." If so, please provide a detailed explanation.

6. Does respondent’s firm/company have a formal diversity and inclusion policy or initiative? Does this policy extend to subcontractors? If so, please provide a copy of the same.

7. Does respondent’s firm/company have a formal mentorship program or offer enhanced training opportunities for minorities and/or women? If so, please provide details.

8. If selected, does respondent expect to assign any female employees, minority employees, or employees with disabilities to provide any of the requested services to SURS? Please explain.
Appendix C: Fee Proposal

Please include detail regarding scope and cost of services, deliverables and timeframe for completion of the required services.

FIRM NAME: __________________________________________________________

ADDRESS: __________________________________________________________

____________________________________________________________________

TELEPHONE: __________________________________________________________

REPRESENTATIVE: _____________________________________________________

1. Define your proposal in a straightforward and economical manner, providing a concise description of your firm’s capabilities to satisfy the requirements of this RFP.

2. Please be sure to include all Proposal Content elements as defined in Section V.

3. Provide your recruitment fee structure and a description of how costs are determined.

4. Cost should be defined on a per recruitment basis.

5. Please advise if there are additional incentives for granting exclusivity.

6. Include any contingency fee structures that may apply, with a full description of the specific contingency, percentage and methodology.

TOTAL Fee and Basis of Fee, Per Recruitment

NOT TO EXCEED Amount: $______ or % ________

Please check and complete one of the following statements as it pertains to travel related expenses:

_________ The above costs DO include all expected travel expenses and said expenses will not be billed separately to SURS.

_________ The above costs DO NOT include all expected travel expenses and said expenses will be billed separately to SURS in compliance with the SURS Travel Policy attached hereto as “Appendix E.”

Responder has read the SURS Travel Reimbursement Policy attached hereto as “Appendix E” and estimates that travel expenses to be incurred for work to be performed relative to this RFP per the terms of said policy will total an amount not to exceed: $_____________.

16
I, _________________________________________, licensed to conduct business in the state of Illinois and an authorized representative of the above-indicated firm, have reviewed and understand the ______________________ Request for Proposals, and I/we am/are prepared to provide the required services for the above costs.

__________________________________
(SEAL)

ATTACH A MINIMUM OF TWO PROJECT REFERENCES, SIMILAR IN DESIGN AND SCOPE.

ATTACH PROOF OF LIMITS OF INSURANCE COVERAGE FOR PROFESSIONAL LIABILITY INSURANCE THAT WOULD PROVIDE COVERAGE FOR WORK PERFORMED ON BEHALF OF SURS.
Appendix D: Addendum to Contract

In consideration of SURS entering into such contract, the vendor/contractor also agrees to the following:

1) If the Contractor is an individual, he or she certifies that he or she is not in default on an educational loan as provided in Section 3 of the Educational Loan Default Act, 5 ILCS 385/3.

2) The Contractor certifies that it is not barred from being awarded a contract or subcontract because of a conviction or admission of guilt for bribery or for bribing an officer or employee of the state of Illinois or any other state in that officer or employee’s official capacity as provided in Section 50-5 of the Illinois Procurement Code, 30 ILCS 500/50-5 and further certifies that it is in compliance with Section 50-37 of the Illinois Procurement Code, 30 ILCS 500/50-37.

3) The Contractor certifies that it will provide a drug-free workplace by engaging in the conduct prescribed in Section 3 of the Drug Free Workplace Act, 30 ILCS 580/3.

4) The Contractor certifies that it is not barred from contracting with SURS because of a violation of either Section 33E-3 (bid-rigging) or 33E-4 (bid rotating) of Article 33E of the Criminal Code of 1961, 720 ILCS 5/33E.

5) The Contractor certifies that neither it nor any substantially owned affiliated company is participating or shall participate in an international boycott in violation of the provisions of the U.S. Export Administration Act of 1979 or the regulations of the U.S. Department of Commerce promulgated under that Act.

6) The Contractor certifies that no fees, commissions, or payments of any type have been or will be paid to any third party in connection with the contract to which this is an addendum, except as disclosed in the contract or an exhibit thereto as provided in 30 ILCS 500/50-25 and in 40 ILCS 5/145. The Contractor shall promptly notify SURS if it ever has reason to believe that this certification is no longer accurate.

7) To the extent Illinois law is applicable to Contractor, pursuant to 775 ILCS 5/2-105, Contractor agrees to:
   a) Refrain from unlawful discrimination and discrimination based on citizenship status in employment and undertake affirmative action to assure equality of employment opportunity and eliminate the effects of past discrimination;
   b) Comply with the procedures and requirements of the Illinois Department of Human Rights’ regulations concerning equal employment opportunities and affirmative action;
   c) Provide such information, with respect to its employees and applications for employment, and assistance as the Illinois Department of Human Rights may reasonably request; and
   d) Have written sexual harassment policies that shall include, at a minimum, the following information:
      i) The illegality of sexual harassment;
      ii) The definition of sexual harassment under state law;
iii) A description of sexual harassment, utilizing examples;

iv) Contractor’s internal complaint process including penalties;


vi) Directions on how to contact the Illinois Department of Human Rights and the Illinois Human Rights Commission; and

vii) Protection against retaliation as provided by Section 6-101 of the Illinois Human Rights Act. A copy of the policies shall be provided to the Illinois Department of Human Rights upon request.

8) To the extent it applies to Contractor and this contract, Contractor agrees to comply with the Illinois Prevailing Wage Act, 820 ILCS 130/1, et seq.

9) Contractor shall maintain, for a minimum of five (5) years after the completion of the contract, adequate books, records, and supporting documents to verify the amounts, recipients, and uses of all disbursements of funds passing in conjunction with the contract. Contractor shall further make all such books, records, and supporting documents related to the contract available for review and audit by the internal auditor of SURS and by the Illinois Auditor General and shall cooperate fully with any audit conducted by the internal auditor of SURS and the Illinois Auditor General and will further provide the internal auditor of SURS and the Illinois Auditor General full access to all relevant materials.

10) Contractor agrees to notify the SURS ethics officer if it solicits or intends to solicit for employment any of the employees of SURS during the term of the contract.

11) Contractor understands that SURS and this contract are subject to the provisions of the Illinois Open Meetings Act (5 ILCS 120/1, et seq) and the Illinois Freedom of Information Act (5 ILCS 140/1, et seq).

12) Counterparts. This Agreement and Addendum may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement. The counterparts of this Agreement and Addendum may be executed and delivered by facsimile or other electronic signature by any of the parties to any other party and the receiving party may rely on the receipt of such document so executed and delivered by facsimile or other electronic means as if the original had been received.

Under penalties of perjury, Contractor certifies that ___________________________ is its correct Federal Taxpayer Identification Number.

Contractor is doing business as a(n) (please circle applicable entity):

- Individual
- Sole Proprietorship
- Partnership
- Corporation
- Not-for-Profit Corporation
- Medical and Health Care Services Provider Corporation
- Real Estate Agent
- Governmental Entity
- Tax Exempt Organization (IRC 501(a) only)
- Trust or Estate
- Other: _______________________
Appendix E: SARS’ Travel Policy

SURS TRAVEL REIMBURSEMENT POLICY TERMS FOR APPROVED TRAVEL EXPENSES OF VENDORS

If responder’s personnel are required to travel to perform work on behalf of SURS, any reimbursement for said travel expenses will be as allowed, in part, by the travel requirements outlined by the Illinois Higher Education Control Board as found in Title 80, Public Officials and Employees, Chapter 4, Travel Regulation Counsel, Part 3000, Illinois Administrative Code as noted below. Accordingly, any expected travel must be preapproved by SURS and said travel reimbursements will be restricted to the following:

NOTE: actual cost receipts for the same must be provided before SURS may reimburse travel expenses.

Travel by Air. SARS will reimburse travel expenses for airfare at the price of a standard coach ticket. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Travel by Rail. SARS will reimburse travel expenses for train travel at the price of a standard coach ticket. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

Travel by Automobile.

i. Rental Cars

SARS will reimburse travel expenses for the use of a rental car at the rate of $60.00 per day. The collision damage waiver and personal accident insurance on rented vehicles are not reimbursable. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

ii. Private Vehicles - Mileage Reimbursement

If an individual chooses to drive a private vehicle, reimbursement for use of a vehicle shall be on a mileage basis and shall be at the applicable rate identified by the Illinois Higher Education Travel Control Board which is based on the rate promulgated pursuant to 5 USC 5707(b)(2) in effect at the time of travel. All travel must be via the most direct route. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any
exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

**Hotel Accommodations.** SURS will reimburse hotel expenses at a maximum rate of $150.00 per day. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

**Per Diem for Meals.** SURS will pay a maximum of $45.00 per day for a full day of *per diem* meal reimbursements with limits of $10.00 for breakfast; $10.00 for lunch and $25.00 for dinner. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.
SERVICES AGREEMENT – PROFESSIONAL RECRUITING SERVICES

THIS PROFESSIONAL RECRUITING SERVICES AGREEMENT ("Agreement"), between VENDOR ("VENDOR") and the State Universities Retirement System, a body politic and corporate created under Article 15 of the Illinois Pension Code ("SURS") is entered into between the parties to be effective as of ______________, 2019. In consideration of the mutual covenants contained herein, and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties hereto agree as follows:

1. SCOPE OF SERVICES

VENDOR agrees to provide PROFESSIONAL RECRUITING SERVICES as described in “VENDOR’S Service Agreement” attached hereto as “Exhibit A” and as described in the “VENDOR’S Service Description for _____________________________” attached hereto as “Exhibit B,” and in any subsequent schedules submitted under the terms of this agreement that are approved, in writing, by both parties.

1.1 Any changes to the scope of services to be provided under this Agreement shall be contained in a written addendum, schedule, transaction document or statement of work that must be signed by both parties and attached as an Exhibit to this Agreement.

2. CHARGES FOR SERVICES

SURS agrees, for and in consideration of the receipt of the goods and services described in this Agreement, in “Exhibit A,” in “Exhibit B,” in “Exhibit C” or in any subsequent amendments submitted under the terms of this agreement that are approved, in writing, by both parties, to pay compensation to VENDOR in the amount of $__________________.

3. BILLING

VENDOR shall invoice SURS for any goods provided and/or services performed under this Agreement prior to payment.

3.1 By submitting an invoice, VENDOR certifies that the goods and/or services provided meet all requirements of the Agreement, that the amount billed is as allowed under the terms of this Agreement, or under the terms of an agreed upon transaction document or statement of work.

3.2 Invoices submitted by VENDOR for goods and/or services performed must be presented to SURS in accordance with the direction provided herein.
3.3 The parties agree that VENDOR shall not bill SURS for any taxes as the parties acknowledge that SURS is a tax-exempt entity and the Illinois sales tax exemption number issued to SURS by the Illinois Department of Revenue is E9990-9936-07. See proof of SURS’ tax-exempt status attached as “Exhibit C.”

4. PAYMENT

Payments shall be paid in accordance with Title 80, Section 1600.130(e)(3) of the Illinois Administrative Code. Final payment may be adjusted by SURS if such adjustment is supported by a SURS audit. All recordkeeping shall be in accordance with sound accounting standards. SURS shall not be liable to pay for equipment, goods or services unless the cost of said equipment, goods or services is agreed upon by the parties in writing.

5. TERM OF AGREEMENT

The term of this Agreement shall begin on the effective date noted on page one of this Agreement and shall expire on _________________, ______ unless either party exercises its right to terminate the contract on an earlier date pursuant to the termination clause referenced herein.

6. ENTIRE AGREEMENT, AMENDMENT OR MODIFICATION

6.1 Entire Agreement. This Agreement, “Exhibit A,” “Exhibit B,” “Exhibit C” and any additional agreed upon schedules, transaction documents or statements of work presented under this Agreement constitutes the full and final expression of agreement between the parties and supersedes all previous agreements and understandings, whether written or oral, relating to equipment, goods or services provided pursuant to “Exhibit A,” “Exhibit B,” “Exhibit C” and any additional agreed upon schedules, transaction documents or statements of work presented herein.

6.2 Amendment or Modification. This Agreement may be amended in writing from time to time by mutual consent of the parties. No amendment or modification of this Agreement shall be valid or binding unless set forth in writing and duly executed by duly authorized representatives of both parties hereunder.

6.3 Conflicting Terms. In any case of conflicting terms, the terms contained in this Agreement (not those contained in “Exhibit A,” “Exhibit B,” “Exhibit C”) shall control.

7. COUNTERPARTS
This Agreement may be executed in counterparts, each of which shall be deemed to be an original, but all of which, taken together, shall constitute one and the same agreement. The counterparts of this Agreement may be executed and delivered by facsimile or other electronic means by any of the parties to any other party and the receiving party may rely on the receipt of such document so executed and delivered by facsimile or other electronic means as if the original had been received.

8. WARRANTY AND DUTY OF CARE

VENDOR represents and warrants that the services provided will materially conform to the description of services contained in the exhibits attached hereto.

9. FORCE MAJEURE

Neither party shall be responsible for delay or failure to perform hereunder to the extent such delay or failure is due to unforeseeable circumstances beyond its reasonable control and not due to its negligence including acts of nature, acts of terrorism, riots, labor disputes, fire, flood, explosion, governmental prohibition, major equipment failures, fluctuations or non-availability of electrical power or telecommunications equipment, or other conditions beyond the control of the parties. If VENDOR’s performance is delayed by force majeure, VENDOR will discuss the situation with SURS as soon as the situation is identified and together the parties will determine whether the Agreement term may be extended for full performance. If an event of force majeure continues for more than thirty (30) days, either party may, at its option, terminate the Agreement.

Per the termination clause contained herein, if either party elects to terminate the contract as a result of force majeure, VENDOR agrees to cooperate with SURS to provide for an orderly transition of the services to SURS at the time of any such termination. If termination becomes necessary due to force majeure, VENDOR will refund the pro-rata share of the total Agreement amount paid by SURS to VENDOR on the date upon which the Agreement is terminated for force majeure reasons.

10. INDEPENDENT CONTRACTOR STATUS

VENDOR’s personnel are not, and shall not be considered, employees of SURS for any purpose whatsoever. VENDOR shall be responsible for payment of all taxes, fees, and claims, including without limitation workers’ compensation, and any other liabilities related to VENDOR’s business operations.

11. BANKRUPTCY

VENDOR shall promptly notify SURS if VENDOR become insolvent, files a petition in bankruptcy, becomes a party to an involuntary bankruptcy proceeding, or makes an assignment
for the benefit of creditors. In such an event, SURS may immediately terminate all or any portion of this Agreement upon prompt written notice.

12. **WAIVER AND WAIVER OF DEFAULT**

12.1 General. No failure to exercise, and no delay in exercising on the part of any party, any right, power or privilege hereunder will operate as a waiver thereof. No single or partial exercise of any right, power or privilege hereunder will preclude any party from further exercise of the same right or the exercise of any other right.

12.2 Waiver of Default. Waiver by any party of default of the other party will not be deemed to be a waiver of any other default irrespective of whether such default is similar.

13. **SEVERABILITY**

Should any term of this Agreement, for any reason be held to be illegal or unenforceable, the remaining terms of this Agreement will continue in full force and effect, and the offending term will be limited or deleted to the extent necessary, to make it enforceable. The parties agree to negotiate in good faith to agree upon a modified term which reflects the original intent of the parties.

14. **CONFIDENTIALITY**

The parties may disclose information received from the other to the extent required by law. However, the Recipient must (unless prohibited by applicable law or governmental authority from doing so) give the Discloser prompt notice and the opportunity to review the request, to redact confidential information not required to be disclosed, to respond to the request for disclosure and the opportunity to make reasonable effort to obtain a protective order if deemed necessary by the Discloser prior to disclosure unless the request is made pursuant to the Illinois Freedom of Information Act, 5 ILCS 140/1, et. seq.

VENDOR agrees to keep confidential any SURS information communicated by SURS to VENDOR in connection with this Agreement that is (i) clearly marked confidential if provided in written form, or (ii) preceded by a statement that such information is confidential, if provided in oral form, and such statement is confirmed in writing within fifteen (15) days of its initial disclosure. This obligation of confidence shall not apply to any information that: (1) is in the public domain at the time of its communication; (2) is independently developed by VENDOR; (3) entered the public domain through no fault of VENDOR subsequent to SURS's communication to VENDOR; (4) is in VENDOR's possession free of any obligation of confidence at the time of SURS's communication to VENDOR; or (5) is communicated by the SURS to a third party free of any obligation of confidence.
15. TERMINATION

This Agreement may be terminated at any time by either party upon thirty (30) days prior written notice to the other party due to a material breach that is not cured within that same thirty (30) day notice period as outlined in “Exhibit A” and otherwise pursuant to the notice provision contained herein.

15.1 Upon proper notice of termination, the remaining terms contained in “VENDOR’S, Service Agreement attached hereto as “Exhibit A,” as described in the “VENDOR Service Description – ______________________________ attached hereto as “Exhibit B,” in the “VENDOR”s _________________________ attached hereto as “Exhibit C” shall apply.

15.2 Termination of this Agreement shall not relieve either party of any obligations hereunder which were incurred prior to the date upon which the termination is effective. All provisions that by their nature would be expected to survive, shall survive termination.

16. DAMAGES

Each party shall be liable to the other party for that portion of any direct damages that result from such party’s willful misconduct, negligence, breach of contract or other wrongful conduct arising out of or relating to this Agreement. In no event shall either party be liable to the other party or to any third party, whether in contract or tort (including negligence), warranty or otherwise, for any indirect, incidental, special, consequential, exemplary or punitive damages arising out of or relating to the Contract, even if the party has been advised of the possibility of such damages.

17. GOVERNING LAW; VENUE

This Agreement and VENDOR’s obligations and services hereunder must be performed in compliance with all applicable federal and state laws. This Agreement shall be enforced, governed and construed in all respects in accordance with the laws of the state of Illinois to the extent such laws are not preempted by the laws of the Unites States of America. VENDOR agrees that to the extent required by Illinois law, it will bring any suit, action, claim or proceeding in, and will submit to (and consents and waives any objection to) the jurisdiction of the Illinois Court of Claims in connection with any claim asserted against SURS arising out of, or in connection with, this Agreement. If not required by law to bring suit against SURS in the Illinois Court of Claims, VENDOR hereby agrees to file any suit against SURS and otherwise submits to (and consents and waives any objection to) the jurisdiction of each of the Sixth Judicial Circuit of Illinois, Champaign County, Urbana, Illinois and the United States District Court for the Central District of Illinois in Urbana, Illinois in respect of any suit, action, claim or proceeding brought by
SURS arising out of, or in connection with, this Agreement. SURS does not waive sovereign immunity by entering into this Agreement.

18. ATTORNEY’S FEES, COSTS AND EXPENSES

The parties shall bear the cost of their own attorney’s fees, associated costs and all other expenses incurred in any matter relating to the enforcement of this Agreement or relating to the breach of this Agreement.

19. SECTION HEADINGS

Section headings have been included in this Agreement merely for convenience of reference. They are not to be considered part of this Agreement or to be used in the interpretation hereof.

20. NOTIFICATION

Notices and any other communication provided for herein shall be given in writing to the contacts designated below by registered or certified mail, return receipt requested, by receipted hand delivery, by courier (UPS, Federal Express, or other similar and reliable carrier), by email, or by fax showing the date and time of successful receipt. Each such notice shall be deemed to have been provided at the time it is actually received. By giving notice, either party may change the following contact information:

VENDOR: VENDOR
Attention: ________________________
Phone: (     ) _______--____________
Fax: (     ) _______--____________
Email: ___________________________________

SURS: State Universities Retirement System
Attention: Executive Director and General Counsel
1901 Fox Drive
Champaign, Illinois 61820
Phone: 217-378-8825
Fax: 217-378-9801
Email: Executive_Director@surs.org and General_Counsel@surs.org
21. STATUTORY PROVISIONS AND CERTIFICATIONS

By executing this contract and by signing at the end of this specific section, VENDOR attests to and certifies to the following:

21.1 If VENDOR is an individual, he or she certifies that he or she is not in default on an educational loan as provided in Section 3 of the Educational Loan Default Act, 5 ILCS 385/3.

21.2 VENDOR certifies that it is not barred from being awarded a contract or subcontract because of a conviction or admission of guilt for bribery or for bribing an officer or employee of the state of Illinois or any other state in that officer or employee’s official capacity as provided in Section 50-1 of the Illinois Procurement Code, 30 ILCS 500/50-5.

21.3 VENDOR certifies that it will provide a drug free workplace by engaging in the conduct prescribed in Section 3 of the Drug Free Workplace Act, 30 ILCS 580/3.

21.4 VENDOR certifies that it is not barred from contracting with SURS because of a violation of either Section 33E-3 (bid-rigging) or 33E-4 (bid-rotating) of Article 33E of the Criminal Code of 1961, 720 ILCS 5/33E.

21.5 VENDOR certifies that neither it nor any substantially owned affiliated company is participating or shall participate in an international boycott in violation of the provisions of the U.S. Export Administration Act of 1979 or the regulations of the U.S. Department of Commerce promulgated under that Act.

21.6 VENDOR certifies that no fees, commissions, or payments of any type have been or will be paid to any third party in connection with this contract, except as disclosed in the contract or in an exhibit thereto as provided in 30 ILCS 500/50-25 and in 40 ILCS 5/1-145. Contractor shall promptly notify SURS if it ever has reason to believe that this certification is no longer accurate.

21.7 To the extent Illinois law is applicable to VENDOR, pursuant to 775 ILCS 5/2-105, VENDOR agrees to:

a) Refrain from unlawful discrimination and discrimination based on citizenship status in employment and undertake affirmative action to assure equality of employment opportunity and eliminate the effects of past discrimination;

b) Comply with the procedures and requirements of the Illinois Department of Human Rights’ regulations concerning equal employment opportunities and affirmative action;
c) Provide such information, with respect to its employees and applications for employment, and assistance as the Illinois Department of Human Rights may reasonably request; and

d) Have written sexual harassment policies that shall include, at a minimum, the following information:

i) The illegality of sexual harassment;

ii) The definition of sexual harassment under state law;

iii) A description of sexual harassment, utilizing examples;

iv) VENDOR’s internal complaint process including penalties;


vi) Directions on how to contact the Illinois Department of Human Rights and the Illinois Human Rights Commission; and

vii) Protection against retaliation as provided by Section 6-101 of the Illinois Human Rights Act. A copy of the policies shall be provided to the Illinois Department of Human Rights upon request.

21.8 To the extent it applies to VENDOR and this Contract, VENDOR agrees to comply with the Illinois Prevailing Wage Act, 820 ILCS 130/1, et. seq.

21.9 VENDOR shall maintain, for a minimum of five (5) years after the completion of the contract, adequate books, records, and supporting documents to verify the amounts, invoiced to SURS in conjunction with the Contract. VENDOR shall further make all such books, records and supporting documents related to the Contract available for review and audit by the SURS designated auditor and by the Illinois Auditor General and shall cooperate fully with any audit conducted by the internal auditor of SURS and the Illinois Auditor General and will further provide the internal auditor of SURS and the Illinois Auditor General full access to all relevant materials.

21.10 VENDOR agrees to notify the SURS ethics officer if it solicits or intends to solicit for employment any of the employees of SURS during the term of the Contract.

21.11 VENDOR understands that SURS and this Contract are subject to the provisions of the Illinois Open Meetings Act (5 ILCS 120/1, et. seq.) and the Illinois Freedom of Information Act (5 ILCS 140/1, et. seq.).
Under penalties of perjury, VENDOR certifies that its correct Federal Taxpayer Identification Number is: ___________________________.

VENDOR certifies that it is doing business as a(n) (please circle and/or highlight the applicable entity):

- Individual
- Sole Proprietorship
- Partnership
- Corporation
- Not for Profit Corporation
- Medical and Health Care Services Provider Corporation
- Real Estate Agent
- Government Entity
- Tax Exempt Organization (IRC 501(a) only)
- Trust or Estate
- Other: _______________________________ (please specify)

Certified / Dated this _____________ day of ____________________________, ______.

Contractor: VENDOR

By: _____________________________

Name: _____________________________ (please print or type)

Title: _________________________________ (please print or type)

22. TRAVEL EXPENSES FOR ON-SITE WORK AT SURS

The parties do not contemplate the reimbursement of any travel related fees under this Agreement. If the parties determine that VENDORS’ personnel will need to travel to SURS to perform work under this Agreement, estimated reimbursement for their travel expenses must be preapproved by SURS and reimbursement for said travel will be as allowed, in part, by the travel requirements
outlined by the Illinois Higher Education Control Board as found in Title 80, Public Officials and Employees, Chapter 4, Travel Regulation Counsel, Part 3000, Illinois Administrative Code as noted below. Accordingly, said travel reimbursements will be restricted to the following and actual cost receipts for the same must be provided before SURS may reimburse travel expenses:

22.1 **Travel by Air.** SURS will reimburse travel expenses for airfare at the price of a standard coach ticket. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

22.2 **Travel by Rail.** SURS will reimburse travel expenses for train travel at the price of a standard coach ticket. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

22.3 **Travel by Automobile.**

i. **Rental Cars**

SURS will reimburse travel expenses for the use of a rental car at the rate of $60.00 per day. The collision damage waiver and personal accident insurance on rented vehicles are not reimbursable. All travel must be via the most direct route. Expenses incurred due to deviations for convenience shall be borne by the traveler. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

ii. **Private Vehicles - Mileage Reimbursement**

If an individual chooses to drive a private vehicle, reimbursement for use of a vehicle shall be on a mileage basis and shall be at the applicable rate identified by the Illinois Higher Education Travel Control Board which is based on the rate promulgated pursuant to 5 USC 5707(b)(2) in effect at the time of travel. All travel must be via the most direct route. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.
22.4 **Hotel Accommodations.** SURS will reimburse hotel expenses at a maximum rate of $150.00 per day in the Champaign, IL area. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

22.5 **Per Diem for Meals.** SURS will pay a maximum of $45.00 per day for *per diem* meal reimbursements with limits of $10.00 for breakfast; $10.00 for lunch and $25.00 for dinner. No reimbursement above this amount will be allowed unless extenuating circumstances exist to support an exception to this travel policy. Any exceptions to this policy must be approved by SURS in advance of travel, in writing, by a duly authorized representative of SURS.

23. **Duly Authorized Signatures**

For SURS:

The undersigned, Martin M. Noven, is the executive director of State Universities Retirement System and has been duly authorized by SURS’ Executive Director, Martin M. Noven, to sign this Agreement on behalf thereof. He, Martin M. Noven and anyone else Mr. Noven may designate in the future as being authorized to sign any amendments, transaction documents, statements of work or schedules presented under this Agreement on behalf of SURS will have the same authority.

For VENDOR:

The undersigned, ___________________, is the _____________________ of VENDOR Inc. and has such been duly authorized by VENDOR to sign this Agreement on behalf thereof. He/She and anyone he/she may designate in the future as being authorized to sign any amendments, transaction documents, statements of work or schedules presented under this Agreement on behalf of VENDOR will have the same authority.

IN WITNESS WHEREOF, the State Universities Retirement System and VENDOR, Inc. have caused this contract to be executed with the effective date referenced on page one of this Professional Recruiting Services Agreement.

Signed for and on behalf of:

**STATE UNIVERSITIES RETIREMENT SYSTEM**

________________________________________  ___________________________________
Date                                           Martin M. Noven, Executive Director
Signed for and on behalf of: VENDOR

____________________________________  _____________________________________
Date       Signature

____________________________________
Name (please print or type)

____________________________________
Title (please print or type)
Appendix G: Current Technical Environment & IT Organization

Below is a brief list of components which describe the current SURS technology environment

- Microsoft Servers
- Microsoft SQL databases
- Client Operating Systems – Windows 10
- IBM iSeries, DB2
- Two physical buildings connected via Fiber – design/implementation in progress May 2019
- Content management – IBM FileNet
- NetApp storage – file types include Adobe products and Microsoft Office products
- Managed Security Services – SecureWorks
- Office 365, Exchange 2016
- AirWatch for MDM
- Service Management – Team Dynamix implementation in progress May 2019
- Legacy iSeries-based Pension Administration System
- SYNON/LANSA development tools

Overview of SURS’ IT Organization

- One CTO
- One Director of Infrastructure & Operations
- One Manager of Application Development
- One Project Manager
- 12 Developers
- 10 Infrastructure and Operations Technologists