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## UT System RFP - Portfolio Review for the UT Horizon Fund

**Open Date:** 02/13/15 05:00 PM

**Agency Requisition Number:** TCO202132015

**NOTE:** You will need to download all of the following files for complete specifications and other required document, including a HUB subcontracting plan(if required).

Help: Right Click to and choose "save file as" or "save target as" to your computer.

-**Package 1** size: 17815 (in bytes) Type: Specification Format: Acrobat PDF Files

The University of Texas System (UT System) is seeking to acquire services of a consultant to perform a portfolio review for the UT Horizon Fund within the Office of Technology Commercialization ("Office"). The expected value of this contract, including fee and travel reimbursement, will not exceed \$60,000. The term of the anticipated contract will be from March 9, 2015 through July 15, 2015

**Agency:** UNIVERSITY OF TEXAS SYSTEM (720)

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**NIGP Commodity Code(s):**

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Class-Item: 918 - 30

**Contact Information:**

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# The University of Texas System Request for Proposal for A Portfolio Review for the UT Horizon Fund **RFP #TCO202132015**

**Overview.** In this Request for Proposal (RFP), The University of Texas System (UT System) is seeking to acquire services of a consultant to perform a portfolio review for the UT Horizon Fund within the Office of Technology Commercialization (“Office”). The expected value of this contract, including fee and travel reimbursement, will not exceed \$60,000. The term of the anticipated contract will be from March 9, 2015 through July 15, 2015.

**Scope of Work.** UT System is seeking to have a consultant (**Consultant**) provide a written review and analysis of the selected portfolio companies within the UT Horizon Fund to be completed no later than July 15, 2015, a written review of each company will include but will not be limited to a current analysis of the technology specific to the current status of the marketplace, other investments that have occurred in related space(s), and company exits that have occurred in related market areas, and an analysis of any additional non-financial support that can be provided by the UT Horizon Fund team. The target audience for this effort is the leadership of the Office of Technology Commercialization and other related UT System executive leadership. At a minimum, the review will include:

1. A written analysis of the company technology as related to current market conditions;
2. Analysis of current investment activity in the related market space. Both new investments and company exits;
3. A creation of a template so that additional analysis can be performed by internal UT System staff;
4. Analysis of current reporting analytics for each company;

Consultant must be prepared to meet and discuss its input with UT System representatives at a UT System facility in Austin, Texas.

**Specifications.** Any proposed Consultant (**proposer**) submitting an offer in response to this RFP must provide the following:

1. proposer’s legal name, including type of entity (individual, partnership, corporation, etc.), address and other contact information;
2. background information regarding the proposer, including the number of years in business and the number of employees;
3. information regarding the qualifications, education, and experience of the team members proposed to conduct the requested services, including information to assist UT System in assessing the proposer’s familiarity with evaluating early stage companies;
4. the proposer’s approach to accomplishing the stated scope of work;
5. the fees to be charged for providing services;
6. the earliest date by which the proposer could begin providing the services;

7. a list of three client references, including any complex institutions or systems of higher education for which proposer has provided services;
8. any unique benefits the proposer would offer UT System, and any other information proposer desires UT System to consider in connection with proposer's offer;
9. information to assist UT System in assessing the proposer's experience performing the requested services for other complex institutions or systems of higher education;
10. information to assist UT System in assessing whether the proposer will be impartial in the performance of the requested services;
11. information to assist UT System in assessing whether the proposer will have any conflicts of interest in performing the requested services;
12. information to assist UT System in assessing the overall cost to UT System for the requested services;
13. information regarding any prompt payment discount offered by proposer (UT System's standard payment terms for services are Net 30 days); and
14. information to assist UT System in assessing proposer's capability to perform the requested services.

**Selection Process.** UT System may select the successful proposal(s) on the basis of the proposals initially submitted, without discussion, clarification or modification. In the alternative, UT System may select the successful proposal(s) on the basis of negotiation with the proposers. In conducting any negotiations, UT System will avoid disclosing the contents of competing offers.

UT System is not obligated to select the proposer offering the most attractive economic terms if that proposer is not the most advantageous to UT System overall, as determined by UT System.

UT System reserves the right to (a) enter into a contract for all or any portion of the requirements and specifications set forth in this RFP with one or more proposers, (b) reject any and all offers and re-solicit offers, or (c) reject any and all offers and temporarily or permanently abandon this selection process, if deemed to be in the best interests of UT System. UT System will maintain in its files concerning this RFP a written record of the basis upon which a selection, if any, is made by UT System. UT System reserves the right to accept or reject any or all offers, waive any formalities, procedural requirements, or minor technical inconsistencies, and delete any requirement or specification from this RFP when deemed to be in UT System's best interest.

**Criteria for Selection.**

The successful proposal(s), if any, will be the proposal(s) submitted in response to this RFP, by the Submittal Deadline that is the most advantageous to UT System. The criteria to be considered by UT System in evaluating offers will be the proposer's demonstrated competence, knowledge and qualifications and the reasonableness of the proposer's fee.

Proposals will be evaluated by UT System personnel. The selection of the successful proposal, if any, will be based on the information provided by proposer in its offer. UT System

may give consideration to any additional information if UT System deems such information relevant. Any proposer submitting a successful proposal will be required to enter into a contract acceptable to UT System.

The criteria to be considered by University in evaluating proposals and selecting Contractor, will be those factors listed below:

- the cost of goods and services;
- the reputation of the Proposer and of the Proposer's goods or services;
- the quality of the Proposer's goods or services;
- the extent to which the goods or services meet the University's needs;
- the Proposer's past relationship with the University;
- the total long-term cost to the University of acquiring the Proposer's goods or services

**Proposer's Acceptance of Offer Evaluation Methodology.** Submission of an offer by a proposer indicates: (1) proposer's acceptance of the Selection Process, the Criteria for Selection, and all other requirements and specifications set forth in this RFP; and (2) proposer's recognition that some subjective judgments must be made by UT System during this RFP process.

**Public Information.** Proposers are hereby notified that UT System strictly adheres to all statutes, court decisions and the opinions of the Texas Attorney General with respect to disclosure of public information. UT System may seek to protect from disclosure all information submitted in response to this RFP until such time as a final contract is executed. Upon execution of a final contract, UT System will consider all information, documentation, and other materials requested to be submitted in response to this RFP to be of a non-confidential and non-proprietary nature and, therefore, subject to public disclosure under the *Texas Public Information Act* (Chapter 552.001, *Gov. Code*). Proposer will be advised of a request for public information that implicates their materials and will have the opportunity to raise any objections to disclosure to the Texas Attorney General. Certain information may be protected from release under Sections 552.101, 552.110, 552.113, and 552.131, *Gov. Code*.

**How To Respond; Submittal Deadline.** To respond to this RFP, proposers must submit the information requested in the Specifications section of this RFP and any other relevant information, by email in a clear and concise written format to Julie Goonewardene at [jgoonewardene@utsystem.edu](mailto:jgoonewardene@utsystem.edu)

All offers must be received at the above address no later than 5:00 p.m. local time in Austin, Texas, on Friday, February 13, 2015 (Submittal Deadline). Submissions received after the Submittal Deadline will not be considered.

**Questions.** Questions concerning this RFP should be directed to Julie Goonewardene at the email addresses noted above no later than February 13, 2015. UT System may in its sole discretion respond in writing to questions concerning this RFP.