

### **Addendum #3**

#### **RFP #CC609-26**

#### Constituent Relationship Management (CRM) Solution

#### **RFP Due Date and Bid Opening Date Change:**

As discussed in the pre-bid meeting the due date and bid opening has changed from 2/24/26 to 3/10/26 at 2:00pm.

#### **Questions and Answers:**

Does Casper College have an estimated number of anticipated end users, including those requiring full system access (e.g., power users) versus read-only or limited-access users.

Student Services team will need approximately 4 power users; 15-20 moderate users; and 7 read-only. IT need 3-to 4 power users/administrators

Given that the inquiry deadline is February 17 and the proposal submission deadline is five business days later on February 24, would Casper College consider extending the submission deadline to March 10 to allow vendors adequate time to incorporate inquiry responses and complete proposal delivery?

Depending on when responses are issued, vendors may otherwise have only two to three business days to make updates and ship proposals prior to the bid closing date.

As discussed in the Prebid meeting the RFP Due Date has been updated to 3/10/2026.

If an extension is not feasible, would Casper College consider allowing proposals to be submitted electronically (via email or procurement portal) in lieu of physical shipment, allowing vendors to use the additional time otherwise used for shipment for proposal revisions based on inquiry responses?

We don't have any way to accept electronic proposals.

Can Casper College please confirm whether vendors are expected to provide direct responses to the questions listed under each subsection in Section 4: Specifications and Scope of Work below:

- Requirements, Student Engagement and Communications, Recruitment, Admissions, and Application Management, Student Experience and Self-Service Tools, Data Reporting, Student Retention, Advising, and Case Management, Preferred Functions, Company Background and Experience in Higher Education, Commitment to End-User Experience, Commitment to Internal-User Experience, Forms and Applications, Communication Methods, Campaign Management and Automated Workflow, Event Management, Records Management, Reporting and Analytics, Integration with Ellucian Colleague and Other Systems, Technical Specifications and Data Security, Implementation, Training, Project Management, and Support, Additional Modules, Functionality, and Future Development Plans ,Data Ownership and Access

If responses to Section 4 are required, could Casper College please advise where within Section 5: Proposal Format (items 1–7) vendors should include those responses?

They can be addressed under experience. We don't need it point by point but we need enough information in your proposal to understand your software and company. You can combine points.

Could Casper College also clarify where vendors should address items 3–8 from Section 6: Evaluation Criteria within the proposal format outlined in Section 5?

They can be addressed under experience.

Would Casper College consider increasing the preferred 30-page limit, or please confirm whether proposals exceeding 30 pages will have points deducted? This clarification would help vendors balance conciseness with providing sufficient detail to address Sections 4 and 6 thoroughly.

The 30 page allows Casper College the ability to effectively evaluate all proposals received. Points will not be taken off if a bidder does exceed the limit by a few pages. Please consider how my graphic you use in your proposal.

Can Casper College please confirm whether the vendor Contract requested in Section 5, item 7 counts toward the total page limit, or if it may be included as an appendix that does not count toward the page total?

You can include this as an appendix.

Similarly, can Casper College please confirm whether resumes submitted in response to Section 5, item 3 count toward the page limit, or if they may be included as a non-counted appendix?

Please provide a brief description of key personnel in the proposal and you can include the full resume in an appendix.

Lastly, could Casper College advise where vendors should include the completed Bid Form (Section 7) and whether it counts toward the overall page limit?

Please include at the end of your proposal. Yes, this will count as part of your page count.

Can you confirm the RFP number is #CC609-26? This is the number on the cover page and addendums, but the header in the RFP lists a different number.

Yes, the RFP number is CC609-26.

Are you willing to accept an electronic signature in lieu of a wet ink signature on all forms?

The RFP must be a physical signature and proposal. To sign contracts, MSA, etc... We can do electronic signatures.

Can you please confirm vendors should submit 4 copies of our proposal?

Yes, we will need a minimum of 4 copies of your proposal so they can be handed out to the evaluation committee.

Could you please clarify whether supplementary materials, such as sample contracts, appendices or attachments, may be included without counting toward the stated 30-page page limit? The 30 page allows Casper College the ability to effectively evaluate all proposals received.

Points will not be taken off if a bidder does exceed the limit by a few pages. Please consider how my graphic you use in your proposal. You can include a sample contract, actual key personal resumes as an appendix and it won't count as towards your 30 pages.

For enrollment-based pricing, can you confirm your most recent total unduplicated headcount (credit and non-credit, if applicable)?

Academic Year: 2024-2025: 4,619 / 2025-2026: 4,529 (Currently in last semester of the academic year)

Term: 25/FA: 3,569 / 26/SP: 3,138 (Currently in this semester)

The RFP references both a one-year initial term with annual renewal options (for a total of five years) and an initial five-year term; can you clarify which contract structure we should assume in our response?

This will be an initial 5-year contract with the option of Casper College to go year to year after the initial term.

The Specifications and Scope of Work (RFP pp. 6-17) include 60+ functional requirements and 75+ detailed questions, while the RFP notes a preference for proposals of no more than 30 total pages. To confirm expectations, is it acceptable to address requirements and questions by section or functional area (for example, a consolidated response for Reporting and Analytics on p. 15), rather than responding to each question individually? We want to ensure our response is complete and aligns with the preferred page limit.

These items can be addressed under the 'Experience' section of your proposal. We do not require a point-by-point response for every requirement; however, your proposal must include sufficient information for the evaluation committee to thoroughly understand your software's capabilities and your company's background. You are welcome to combine related points into consolidated summaries to remain within the preferred page limit

What are the primary drivers behind issuing this RFP?

Dissatisfaction with current vendor particularly in the area of product and end user / end-user support.

Are there specific recruitment, admissions, or retention challenges the College is seeking to address through this CRM investment (e.g., enrollment growth, yield optimization, persistence, equity outcomes, operational efficiency)?

Yes, Casper College is seeking to address all areas of Strategic Enrollment Management with a CRM. From a Strategic Enrollment Management perspective, Casper College's CRM investment is intended to address interconnected recruitment, admissions, yield, retention, equity, and operational challenges by finding a truly student-first, user-friendly system that supports the entire enrollment lifecycle. We would like to strengthen enrollment growth and market competitiveness in a shifting demographic environment by improving inquiry-to-application conversion through personalized, behavior-driven communications and better prospect segmentation, while also increasing yield by ensuring that students who apply actually matriculate through automated next-step tracking, coordinated cross-department communication, and clear visibility into funnel drop-off points. We have a major emphasis on retention and persistence, requiring integrated early-alert tools, case management workflows, proactive outreach capabilities, and shared communication records so advisors and student support teams can intervene in real time rather than reactively. At the same time, we would like to close equity gaps by using disaggregated data and targeted outreach strategies to better support first-generation, non-traditional, adult, and underrepresented students, ensuring processes are mobile-friendly, transparent, and easy to navigate. Internally, the CRM must dramatically improve operational efficiency by providing clean, accessible, real-time reporting across the funnel (from inquiry through enrollment and retention) with intuitive dashboards and simplified data extraction so staff can easily pull and interpret information without relying on manual spreadsheets. Ultimately, this investment represents a strategic shift from siloed, transactional processes to a coordinated, data-informed, and student-centered SEM model designed to increase enrollment, improve applicant-to-matriculant conversion, strengthen persistence, enhance equity outcomes, and empower staff through clear reporting and ease of use.

Who are the primary stakeholders involved in evaluating RFP responses, and which departments will serve as primary CRM users?

The primary stakeholders are Enrollment Services including Admissions and Student Success, as well as the CRM Coordinator, IT, and PR.

What level of comfort does the institution have with AI-driven recommendations, predictive modeling, and automated communications?

Our legislators are discussing this currently in session. There is also a policy being formed here at CC, but this is probably best answered by your team.

Are there any data governance, AI usage, or policy constraints vendors should be aware of as part of this procurement?

AI policy is under review with the policy committee and there will be some PII constraints, however there is not an AI prohibition

To help us model ROI specific to Casper College could you share baseline enrollment funnel volumes?

- Approximate number of outbound marketing prospects (students you actively reach through campaigns). 20,000
- Approximate number of inbound engagement prospects (students who engage with you digitally or via events). 7,500
- Current number of applications (annual). Between 3,000-6,000
- Current number of new enrollments (annual) 1,350

To help us provide Casper College with a clear ROI model, could you share baseline figures for:

- Current prospect-to-application and application-to-enrollment rates?  
This varies some based on datasets, but prospect to application is 80% and for FA25 completed app to enrollment 60% is accurate
- Current retention rate used for enrollment forecasting?  
We use IPEDS data for retention rates.
- Average tuition per enrolled student (or a proxy you'd like us to use)? (We understand some of these are estimates, but having Casper College-provided numbers ensures we calculate ROI in a way that reflects your reality, not just vendor assumptions.) See below:

2025-26 Tuition and Fees (fall and spring semester)

Summary of Costs

2025-26 Tuition and Fees (fall and spring semesters)

This does not reflect any financial aid or scholarships.

- Resident: \$4,410
- WUE: \$6,000
- Non-resident: \$10,710

\*Based on 15 credit hours.

Living expenses, including food and housing

Standard double occupancy with 19-meal plan, including housing deposit: \$8620.00

Note: There is no resident/non-resident distinction in CC's housing fees. Fees vary based on occupancy type and selected meal plan.

Books, course materials, supplies and equipment

\$2,100

Note: These costs include all potential books, supplies, learning technology and other resources you might need. Because they vary, the figure above represents an average number and is subject to change. This figure does not include potential transportation costs, miscellaneous and personal expenses, or student loan fees.

What CRM or related systems are currently in use for recruitment, admissions, communications, or advising? What is driving the transition at this time?

SLATE and See above question.

Is Casper College currently utilizing Ellucian Ethos Integration services, and if so, which APIs or integration patterns are in active use? Additionally, are there any current licensing or service constraints related to Ethos that vendors should consider in their integration approach?

Yes

The RFP places significant emphasis on application fraud detection and identity verification. Has the College experienced recent increases in fraudulent applications, and are there specific compliance or audit concerns driving this requirement?

Yes absolutely

Is the College seeking to deploy the CRM across the full student lifecycle (including advising and retention), or is the initial focus primarily recruitment and admissions?

Primarily recruitment and admissions

Is there a desired go-live timeline or enrollment cycle the College is targeting for initial deployment?

July 1, 2026 to replace our existing product but we would hope for an overlap of 1 to 2 months running the chosen product parallel without current product.

Has funding been allocated for this project, and are there budget parameters vendors should be aware of as we structure a five-year total cost proposal?

Yes, we would be interested in 1-, 3- and 5-year options

Are there specific reporting gaps or limitations in your current environment that this CRM investment is intended to address?

Yes, please see above answer.

Is Casper College seeking to consolidate multiple existing tools (e.g., texting platforms, marketing automation, event management, application systems, advising tools) into a unified CRM platform, or should vendors assume coexistence with certain incumbent systems?

Yes, if possible, this is covered in the RFP.

Can you provide details on the number of staff members that will require access to the system and what their roles will be (e.g. system administrators, other full access users, limited functionality such as application reviewers, etc.)?

See above answer

How many staff members would require appointment scheduling functionality and the ability to set and manage their availability?

20-25 Approximately

Approximately how many applications does Casper College receive each year?

Between 3,000-6,000

Will it be necessary to import application data into the CRM from other sources? If so, where will that applicant data come from?

Yes, from SLATE, initially.

Does Casper College want the ability to accept and process application fees or other payments within the system? If so, does CC currently have a payment gateway that they use?

Yes, Payment Gateway is Nelnet

Would CC be interested in providing non-credit students with the ability to register for and purchase classes/certifications/micro-credentials/etc. through a shopping cart type experience? If so, can you provide an estimate of how many registrations/enrollments CC has each year related to Continuing Education and other non-credit related options?

Yes

Approximately how many unique email addresses (contacts) does CC include in email campaigns annually?

12k plus - this does not include current students, just prospective.

On average, how many active contacts would you estimate that the CC has each month? These would be individuals that you would expect to receive at least one email or one SMS message during the month.

2,000-4,000

Can you provide separate estimates of the quantity of both emails and texts that you would expect to send in a year?

Through the CRM Email estimate is 350,000 and does not currently include correspondence directly with the admissions team. Texting we sent 77,811 in 2025 and received 13,691 to 9,000 contacts



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