Issue Date: January 20, 2026

Casper College | Procurement Department

125 College Drive, Casper WY 82601

Request for Proposal:

CONSTITUENT RELATIONSHIP MANAGEMENT (CRM) SOLUTION

Request for Proposal Number:

#CC609-26

PROPOSAL DUE DATE AND TIME:

February 24, 2026 – 2:00 P.M. Mountain Time

Request for Proposal Opening:

February 24, 2026 – 2:00 P.M. Mountain Time

Question Deadline:

February 17, 2026 – 4:00 P.M. Mountain Time

Non-Mandatory Site Visit / Zoom Call:

February 12, 2026 – 2:00 P.M. Mountain Time

PROCUREMENT REPRESENTATIVE: Shane Pulliam

E-MAIL ADDRESS: shane.pulliam@caspercollege.edu

TELEPHONE NO.: (307) 268-2633

SECTION 1: Definitions and Terminology

Wherever used in this bid or other related procurement documents, the following terms have the meanings indicated. These definitions apply to both singular and plural forms and may be used interchangeably.

- **Addendum:** Written or graphic instruments issued prior to the bid opening that clarify, correct, or change the bid or related procurement documents.
- **Bid / Bid Form:** The pricing and/or documentation submitted to the College in response to the Request for Proposal (RFP).
- **Bidder / Firm:** The company or vendor submitting a bid.
- **Contract:** An agreement between Casper College and the successful bidder, including the written contract, RFP, any addenda, purchase order(s), terms and conditions, and the bidder's response to the RFP.
- **Contractor:** The company awarded a contract or purchase order under this bid.
- **Evaluation Committee / Stakeholders:** Casper College employees or contracted individuals with a vested interest in the project.
- **Purchase Order / PO:** A contractual agreement outlining terms for the purchase of goods or services, including payment terms, delivery dates, quantities, item details, freight terms, and other conditions.
- **Request for Proposal (RFP) / Proposal**: A formal, publicly released document that outlines a need and invites businesses to submit bids to meet that need.
- **Specifications / Scope of Work:** Written or graphic descriptions outlining materials, equipment, standards, workmanship, services, and other administrative or technical details relevant to the proposal.

<u>The following designations are used interchangeably:</u>

- Casper College, College and The College
- Contract and Agreement
- Evaluation Committee and Committee
- Proposal, Bid and Bid Proposal
- Bidder, Person, Vendor, Company, and Firm
- Request for Proposal and RFP
- Constituent Relationship Management and CRM

SECTION 2: Instructions to Bidders and Bid Requirements

1. **General Conditions:** The Procurement Department will receive proposals for a new Campus Relationship Management System. Proposals are due no later than February 24, 2026 at 2:00 PM Mountain Time.
2. Casper College reserves the right to waive irregularities or informalities, even those designated as mandatory, provided such waiver does not confer an unfair advantage or disadvantage.
3. Casper College may accept or reject any or all proposals. The College is not bound to accept the lowest bid, but rather the one deemed to be in the best interest of the institution. Pricing is important but not the sole criterion.
4. The bidder warrants that no kickbacks, gratuities, or contingency fees have been or will be paid in connection with this proposal, and that no conflict of interest exists with any individual involved in the process.
5. Casper College is committed to equal opportunity. Minority business enterprises are encouraged to participate. The College will not discriminate on the basis of age, race, color, sex, creed, religion, national origin, or disability. The awarded bidder must comply with the Americans with Disabilities Act and the Wyoming Fair Employment Practices Act.
6. The bidder certifies that its firm, including affiliates, subsidiaries, or subcontractors, provides equal employment opportunities regardless of protected status. Violation of this certification may result in termination of the contract.
7. All proposals are subject to public inspection in accordance with the Open Records Act. Proprietary or confidential information must be clearly marked and will be protected only to the extent allowed by law. Entire proposals cannot be marked as confidential.

Preparation of Proposals

1. Bidders should thoroughly review all bid documents, specifications, scope of work, drawings, and any addenda. Failure to do so is at the bidder’s own risk. Use only the RFP and referenced documents to prepare proposals.
2. All required documents (as outlined in Section 5) must be completed, signed by an authorized representative, and returned with the sealed bid.
3. Deviations or substitutions must be clearly noted and accompanied by complete specifications. Without a deviation statement, full compliance with the specifications is assumed.
4. Failure to provide a deviation statement and supporting documentation (if applicable) may result in bid rejection.
5. A proposal may be rejected if it modifies any specifications or minimum requirements outlined in the RFP.

6. Bid pricing must include all associated costs (materials, labor, installation, disposal, freight, insurance, etc.) on an FOB Casper College basis. In case of pricing discrepancies, unit pricing will prevail.
7. All preparation and submission costs are the responsibility of the bidder and will not be reimbursed.
8. Bid documents are available free of charge at:

caspercollege.edu/offices-services/purchasing
rockymountainbidsystem.com

Submission, Modifications, Withdrawals, and Late Bids

1. Proposals must be sealed, include the attached Bid Form, and be signed by an authorized official. Late or unsealed proposals will not be accepted.
2. The Total Lump Sum Price must include all associated costs: labor, materials, operations, inspections, permits, bonds, insurance, incidentals, taxes, lodging, and proper disposal of existing materials.
3. Mail or hand-deliver sealed proposals to:

Attention: Procurement Department GW #311
Casper College
125 College Drive
Casper, WY 82601

4. Clearly label the outside of the proposal: "Constituent Relationship Management (CRM) Solution – RFP #CC609-26"
5. Proposals may be modified or withdrawn prior to the deadline via signed email, fax, or letter from an authorized representative.
6. Modifications must be initialed by the authorized signatory.
7. Revised pricing must be submitted in a new sealed envelope and received before the proposal deadline.
8. Verbal or telephone modifications or withdrawals are not accepted.
9. A bidder who fails to fulfill awarded services may be excluded from future consideration.
10. Fax, telephone, or electronic submissions will not be accepted.

Questions and Addenda

1. Direct all questions or clarifications to:

Shane Pulliam, Director of Procurement
125 College Drive
Casper, WY 82601
Phone: (307) 268-2633
Email: shane.pulliam@caspercollege.edu

2. Submit all inquiries no later than February 17, 2026 at 2:00 PM Mountain Time. Late inquiries will not be accepted. Addenda will be posted within one business day of that deadline when possible.
3. Only the Procurement Department may issue official addenda. Oral interpretations will not be binding.
4. Bidders are responsible for checking the bid sites for addenda prior to submission. All addenda must be acknowledged on the Bid Form.

Bid Opening

1. A public bid opening will take place on February 24, 2026 at 2:00 PM Mountain Time in Room 310 of the Gateway Building on the Casper College campus. All interested parties may attend.
2. All bids must remain valid for a minimum of sixty (60) calendar days from the proposal closing date.

Award and Contract Information

1. The bidder affirms that it has the necessary expertise, capacity, and legal credentials to execute the contract to the highest professional standards.
2. The awarded contractor may not assign, subcontract, or transfer the contract or any interest therein without prior written consent from Casper College.
3. If the awarded bidder declines the contract, Casper College reserves the right to award the contract to the next qualified bidder, reissue the RFP, or cancel the solicitation.

SECTION *3: SCHEDULE OF ACTIVITIES*

Activity	Date	Time (our clock)
Issue / Post RFP	2/2/26	N/A
Site Visit / Zoom Call (recommended)	2/12/26	2:00 pm
Last Date for clarification inquiries	2/17/26	2:00 pm
Proposal submission deadline/Proposal opening	2/24/26	2:00 pm
Schedule of interviews / Project Award	Week of 3/2/26 (estimated)	N/A

SECTION *4:* SPECIFICATIONS AND SCOPE OF WORK

1. Casper College is seeking proposals for a comprehensive Higher Education Constituent Relationship Management (CRM) solution that goes beyond traditional functionality to support the full student lifecycle—from prospect through graduation and beyond. The system must provide the tools, automation, website and Student Information System (SIS) integration, and other advanced features of state-of-the-art CRM systems on the market to meet the enrollment goals of the college.
2. The ideal solution will deliver personalized engagement, intelligent automation, and integrated support tools that enhance existing systems and processes.
3. The selected platform must be scalable, purpose-built for higher education, and capable of integrating with key institutional systems—such as the Student Information System (Ellucian Colleague), Learning Management System (Moodle), and other external technologies.

Requirements

1. Vendor Qualifications and Capabilities including Training Options.
2. Demonstrated experience delivering comprehensive CRM solutions to higher education (minimum of 3 years)
3. Dedicated onboarding and training for Casper College Staff, with various support level options before, during implementation and after deployment.
4. Implementation, training, and support services that enable Casper College to fully utilize CRM functionality, including built-in, role-based training as part of onboarding for each user type
5. SAAS compliant Ethos integration with Ellucian Colleague
6. Ability to manage incoming data from multiple sources, including manual entry, web forms, and batch imports, while maintaining data integrity through intuitive duplicate detection and resolution, and supporting field-level locking and governance controls.
7. Role-based user access and FERPA-compliant data privacy and security standards with HECVAT and/or SOC 2 compliant security features. HECVAT is preferred but SOC 2 may be substituted.
8. Compliance with applicable data privacy regulations, including GDPR, with documented controls and processes to support institutional compliance obligations. All Customer Data shall be stored, processed, and transmitted exclusively within data centers physically located in the United States. Provider shall not transfer, access, or process Customer Data outside of the United States under any circumstances without Customer’s prior written consent.
9. User-friendly, web-based interface that does not require coding, scripting, or software development skills for configuration, daily operation, or reporting.

10. The solution shall provide a robust, fully secure RESTful API implementing modern security best practices, preferably including OAuth 2.0 for authentication and authorization. The API shall support bi-directional integration with Ellucian Colleague SIS, SoftDocs eTrieve, Google Analytics, and HubSpot, enabling secure, automated data exchange between systems.
11. Support for Single Sign-On (SSO) using industry-standard identity protocols (e.g., SAML, OIDC), integrated with institutional identity management systems.

Student Engagement and Communications

1. Advanced segmentation and true personalization capabilities (including segment-of-one targeting)
2. Support for automated and ad hoc personalized communications with the ability to manage, trigger, and track communications across multiple media, including email, SMS/text messaging, and postal mail
3. Two-way texting, email, phone, and multi-channel campaign functionality
4. Responsive, WYSIWYG content creation tools that support embedded images and video and allow non-technical users to create and edit HTML email templates without coding, scripting, or developer assistance.
5. The CRM must include built-in, two-way SMS/text messaging functionality sufficient to replace a standalone higher education texting platform, supporting individual and bulk messaging, personalization, response tracking, opt-in/opt-out management, and compliance.
6. Native phone/telephony integration with automated call logging and click-to-call support
7. Native email integration with automated message logging and institutional domain support. Deployment and Integration must include import from multiple contact lists included but not limited to Constant Contact. Include system capability to segregate contact lists from different areas. An example would be how does the Public Relations office utilize the system for their needs while staying segregated from the lists used by student services for recruiting.
8. Centralized tracking of communication history with individuals and organizations, capturing all interactions including phone conversations, emails (personal and automated), text messages, mailings, and event attendance, in a unified timeline viewable by authorized users.
9. Ability to track communications for each prospective and enrolled student, including delivery, open, click-through, and response activity
10. Communication analytics including delivery, open, click, and response tracking
11. Shared notes and follow-up reminders associated with individual records that are visible to authorized users across teams and departments.
12. Workflow- and event-triggered automated communications across the student lifecycle
13. Ability to create and manage multiple concurrent campaigns with automated task management, reminders, and workflow-driven follow-up activities.
14. AI-powered content generation and editing (e.g., GPT-style writing assistance)

15. Web-based, AI-driven chatbot functionality that provides automated responses to student inquiries, supports appointment scheduling, and routes inquiries to the appropriate staff member when unable to resolve the request.
16. Embedded AI agents that support students and staff across communication touchpoints
17. Lifecycle communication tools from prospect through alumni engagement
18. Team and departmental collaboration tools including shared notes, tasks, and reminders
19. Role-based access controls and audit logging for communications

Recruitment, Admissions + Application Management

1. Customizable online admissions application that retains application history, recognizes returning applicants, and pre-populates previously submitted data for subsequent applications
2. Fraud detection and prevention capabilities for admissions applications, including risk-based scoring and automated routing for manual review based on defined criteria such as IP address analysis and identity verification. The system must support automated identity checks, including ID capture, image capture, and short video recording, and be able to trigger these requirements automatically based on fraud risk scoring.
3. Support for recruitment across diverse student populations, including dual enrollment, technical programs, transfer students, and continuing education.
4. Lead and prospect management with configurable recruitment stages and status progression.
5. Logic to identify, track, and forecast recruitment and engagement steps taken by prospective students.
6. Predictive lead scoring capabilities that assess likelihood to apply, enroll, persist, and complete, using configurable models with explainable factors, and that support use in workflows, prioritization, and reporting.
7. Territory, population, or caseload management to support recruitment assignments and accountability.
8. Event registration and management capabilities that support robust registration and check-in, mass event creation, user-friendly embeddable calendars, built-in surveys and evaluations, and automated pre-event and post-event communications associated with each event.
9. Reporting capabilities for appointments, including appointments scheduled, no-shows, appointment duration, and check-in wait times, with the ability to automate appointment reminders and post-appointment follow-up communications.
10. Predictive lead scoring capabilities that assess likelihood to apply, enroll, persist, and complete, using configurable models with explainable factors, and that support use in workflows, prioritization, and reporting.

Student Experience + Self Service Tool

1. Support for recruitment across diverse student populations, including dual enrollment, technical
2. Student retention and success tools that support early alerts for potential issues, advising and case management workflows, engagement tracking, shared notes, support service tracking, and referrals to institutional resources.
3. Ability to host and present informational video content within the admissions application and student portal, as well as on publicly accessible pages, including campus tours, orientations, program highlights, and faculty interviews.
4. Student-facing self-service tools that allow students to easily view their application status, required materials, transcript receipt, admission decisions, registration progress, and remaining steps toward enrollment and completion.

Data Reporting

1. Comprehensive tracking and reporting of students across the full recruitment, enrollment, retention, and completion lifecycle, including prospect, inquiry, applicant, admit, enrolled, retained, and completed statuses. Reporting must be accessible and customizable for retroactive analysis, real-time monitoring, and future forecasting, with the ability to compare performance across time periods (weekly, monthly, annually) and by applied and entry terms.
2. Detailed reporting and analytics capabilities that include both vendor-provided standard reports and customizable reporting options
3. Role-based, configurable dashboards that allow users to track KPIs, prospect prioritization, task management, and progress toward goals at both institutional and individual territory levels
4. AI-powered insights with natural language querying for dashboards and reporting
5. Real-time analytics across campaigns, student behaviors, and lifecycle progress
6. Business Intelligence-style visualizations to support data-driven decision-making.
7. A user-friendly, web-based interface designed to be intuitive for students and campus professionals (faculty and staff), requiring no coding or programming expertise to use or manage.

Student Retention, Advising and Case Management

1. Student retention and success tools that support early alerts for potential academic, engagement, or persistence risks.
2. Advising notes and case management capabilities that allow authorized staff to document interactions, track issues, and manage ongoing cases.
3. Support service tracking to record referrals, interventions, and outcomes across advising, tutoring, financial aid, and other campus services.
4. Referral management to route students to appropriate campus resources and track follow-through and resolution.

5. Centralized engagement history that consolidates communications, advising notes, alerts, and interventions to support coordinated outreach and effective intervention strategies.
6. Role-based access controls to ensure appropriate visibility and FERPA-aligned handling of advising and case management information.

Preferred Functions (We may consider some variances)

1. Integration with email which allows for the ability to reply directly to inquiries from mass e-mails without logging into a separate system or portal. Integration must include import from multiple contact lists included but not limited to Constant Contact.
2. Integration with SoftDocs eTrieve
3. Integration with our Digium Switchvox phone system
4. Call center functionality
5. Address capability or features toward math and English Automatic Math and English placement
6. Please address the following in your response:
   a. Commitment to State-of-the-Art Features: Please provide a description and examples of how your software has advanced to bring state-of-the-art features specifically targeted at higher education. How have you advanced functionality in the following areas?
      1. Enrollment opportunity management that both quantifies the opportunity we have in enrolling someone (lead scoring) and converting them to enroll as a student.
      2. Lead scoring, prioritization, and management via customizable dashboard and task manager that integrates with google calendar so that we can easily identify the people we should be following up with. This should incorporate demographic and behavioral data as a basis for identification.
      3. Reports and dashboards - This should be a single database that includes a simple UI that allows us to customize dashboards and the ability to create custom reports. Vendor supplied a database of standard reports.
      4. Campaign analytics - The system should allow us the capability to analyze our campaigns that collect data from email, text, website, social media, polls, and surveys to name a few.
      5. Funnel forecasting - The system will allow us to forecast key metrics and enrollment based on the data captured within the CRM system. It should take into account multiple data points and time periods and benchmark against organizational history and goals.
      6. Great workflow management - This functionality allows us to structure and standardize workflow for key roles involved in the enrollment process. It should alert users to problems and track performance at each stage. Time stamps of key tasks are also of interest.

7. Enrollment data analysis that allows us to stratify the enrollment funnel and other data points in many different ways such as employer, geography, psychographic category, website visits, number of contacts, first source for contact record, program of interest, etc.
8. Enrollment performance management - The system should easily point to where our enrollment process is working well. We would like to look at what elements perform the best including the representative or other element of the admissions process.
9. Marketing automation and personalization - Allows Casper College to target the right people with personalized messaging relevant to their behaviors and history in our campaigns and manage multiple campaigns across multiple channels easily.
10. Web based Chat or customizable AI agent capabilities
11. Integration with Google Analytics and UTM creation and management that allows us to collect website traffic at the IP level, identify the source of the traffic and integrate that data throughout the CRM system as noted earlier.
12. Web-based editor to create and edit landing pages, portals, personalized video, and customized content based on interests and online behaviors of contact.

b. Please address how you receive input and or criticism from higher ed customers to improve your products. Provide examples of both successes and failures to deliver a new requested feature and why?

Company Background and Experience in Higher Ed

1. Please provide a brief history of your company including when it was founded, what primary market it serves, and how long it has been involved in the Higher Education market.
2. Please include details on the number of clients you serve that are Community College and the number of clients you serve that use Ellucian Colleague for their SIS.

Commitment to End – User Experience: Please provide evidence of your company's commitment to end-user experience by addressing the following questions:

1. Does your solution work well on a mobile device? If so, was it built using responsive design or can it only be accessed using an app?
2. Is there a portal for students? Can applicants manage their own login username and password? What tools are available to prospects/applicants to track their own progress toward admission and enrollment (i.e. checklist of steps to be completed, remaining documents for submission)? Is this individually customizable?

3. Are there customizable features that allow different departments to leave messages for individual students within the portal?

Commitment to Internal – User Experience: Please provide evidence of your company's commitment to internal-user experience by addressing the following questions:

1. How many steps/clicks are involved in the most common processing of information, such as logging an interaction or call? Are screens, labels, and other designed features consistent from section to section?
2. What are the different user roles that your system is designed for and what level of "technical savvy" is required for each type of user?
3. What items/sections are considered more advanced?

Forms and Applications: Please describe whether or not the CRM provides a customizable online application for admission and/or other customizable web forms. Include evidence about the CRM's enhancement of limitation pertaining to the following:

1. Ability to use conditional logic in forms, thank you screens, and confirmation messages
2. Functionality to pre-populate applications and other forms with information we already have for an individual
3. Payment processing capabilities (If available, what types of payment does the system accept? Does the CRM integrate with payment gateways? If so, which ones?)
4. Please address any limitation on the number of applications and forms that can be produced and what is required to make changes to them (Can Casper College update and change them at any time using self-serve editing tools or is vendor involvement necessary?)

Communication Methods

1. Please address the different modes of marketing and communication provided through the CRM and how they can be integrated into campaign management design. In your response, please provide details regarding the availability of pre-designed templates, options for customization, ability to send in batch while still tailoring messages to the individual through conditional logic, and automatic response options for incoming electronic messages.
2. Please include specifics on the following media in additional to any others that your product has available:
   a. Broadcast Email (Please address any limits on number of messages that can be sent at one time, features to improve deliverability through spam-filters, compliance with CAN-SPAM act, and mobile-responsive design.)

   b. Text messaging (What data must be collected in order to utilize text messaging? Please address both mass and individual text messaging capabilities.)
   c. Postal Mail (Are there letter and mailing label templates? Tools to assist with bulk mailing?)
   d. Call-center functionality
   e. Social Media Engagement
   f. Online chat (group or 1:1)

3. Please describe how the above communications are logged in the CRM (i.e. automatically when sent, manually added, etc.) and provide screenshots of interfaces to review the communication history for an individual. What tools and reports are available for permanent bounce rates, etc.? What tools are provided to inactivate "bad" phone numbers, email addresses, etc.? What reporting is available for tracking?

Campaign Management and Automated Workflow: Please explain your system's campaign management and automated workflow features including the following:

1. Explain/illustrate how an individual is classified and converted through the different stages of the recruitment/enrollment funnel: prospect, inquiry, applicant, admit, enrolled student. How easily can they be converted to the next stage in the funnel? Is this done manually? In batch? Automatically through integration with the student information system? Does this feature keep a historic log?
2. How are campaigns scheduled, and what level of technical expertise is required to design a multi-channeled campaign?
3. Does the system allow for multiple campaigns to be run simultaneously?
4. Can campaigns handle communications that are triggered by both pre-defined schedules and response to student interactions?
5. What different methods of communication can be utilized in a single campaign?
6. Do campaigns take student communication preferences into account?

Event Management: Please address the following in regard to the CRM's event management functionality:

1. What types of events can be managed (i.e. on-campus, off-campus, recurring)?
2. Does the system provide for management of multiple activities/sessions within a large event such as an Orientation?
3. Do the event management components of the CRM include event pages (e.g., event calendar, registration forms, landing pages, confirmation messages, etc.)? If so, can these be built using responsive design or are they already responsive? What level of technical expertise is required to customize the content of these pages?

4. Can we drive students to different events based on an attribute or set of attributes (e.g., prospective students versus admitted students, biology major versus English major, etc.)
5. Can we create an unlimited number of registration forms?
6. Is there functionality to send confirmations, reminders, and personalized itineraries for events once a person has registered, and will these messages allow for conditional logic in order to personalize responses?
7. Will the system allow a student/guest to make changes to their own registration?
8. Does the CRM allow collection of online payments for events, and is it able to calculate individualized fees based on data collected in the event registration (e.g., person type, selected event elements, etc.)?
9. What types of event information can be stored in the system (i.e. guest limits, locations, capacity, attendance, etc.)?
10. What features are included/available to help track event attendance and automate follow-up with no-shows and cancellations?
11. Does the CRM provide survey tools for evaluation of events?

Records Management: Please address the following regarding records management within the CRM:

1. What types of records can be stored in your solution and what are the capabilities to add custom data fields? Do such customizations have to be performed by your company or can an on-site system administrator do them? Are there any limitations on the number of records that can be stored in and extracted from your system? Can records be archived and/or purged? Can a person's record have multiple roles (i.e. parent, alumni)? Can a person have multiple applications? Can we customize the retention settings to any time frame we wish
2. Does your solution provide the ability to batch edit and delete records? Describe the process and standard tools used to import Student Search names, test scores, etc. into the CRM from CVS and other flat files. What tools will we have available to create our own imports/exports and can these packages/templates be saved for future use? Can they be automated?
3. What is the process for identifying and resolving duplicate or possible duplicate records? Are duplicate criteria customizable, and will duplicate records be locked, sent to a holding bin, purged, etc.?
4. Does your CRM provide an audit trail that details the edits made to a record?
5. What types of user roles can be defined and how granular is the security that can be applied to these roles?
6. What type of search capabilities does your CRM include? Name, DOB, SSN, ID#, High School? And what type of filters and sorts can be applied to list results?

7. How accessible is the data in your database? Describe the process and provide screen-shots of how an end user could build an advanced query and what options are available for exporting that information.
8. Can queries, advanced filters and sorts, and other searches be saved for future use by the creator and other system users, without affecting other users?

Reporting and Analytics

1. Describe your system's ability to allow for cross-site tracking. Can it connect tracking done across institutional web properties and correlate it back to records in the CRM?
2. Describe your system's dash-boarding capabilities, content, and customization options. Does your CRM include standard and customizable report options?
3. Does it provide capabilities for year-over-year comparisons?
4. Are there standard reports that can be used to measure return on investment (ROI)?
5. What level of expertise is necessary to run reports? What level of expertise is necessary to create reports?
6. What tools does your system have to help identify probability to enroll based upon interactions, origin, geography, alumni/parent history, test scores etc.
7. Do your reports provide a funnel snapshot? Are the drill-down capabilities to work with individuals at different stages?
8. Does the CRM provide and/or integrate with tools such as Tableau and Business Objects?

Integration with Ellucian Colleague and Other Systems

1. What options are available for bi-directional integration with Ellucian Colleague (i.e. ELF, API, FTP site)?
2. What aspects of these options are manual and what aspects are automated?
3. What data can be transferred between systems, how frequently, and are third-party solutions required?
4. Does your company provide the programming for integration with Colleague, or would that be the responsibility of the college's IT staff?
5. Describe how the solution would integrate with various marketing tools such as: HubSpot, google analytics, etc.
6. What options are available for integration with SoftDocs document imaging software? At a minimum, does the CRM have the capability to produce pdf files of admission applications that can be exported to the document imaging system?
7. Describe integration capabilities with Digium Switchvox Phone System or Google Suites?

8. What support is available for questions related to Ellucian Colleague integration. Provide specific examples such as Online, Bot, A real person to talk to, solve ourselves via forums?
9. Describe integrations with Workorder/ Ticketing system?

Technical Specifications and Data Security

1. What are your hosting options (on-site, off-site, cloud-based)?
2. Will any of our data be hosted off shore in a cloud-based solution proposal?
3. Please describe server requirements and recommended hardware if hosted on-site.
4. If hosted in a datacenter off-site, please describe data-ownership policies applied and what format and process will be employed to turn over the institution’s data upon contract termination. Will Casper College’s data be kept separate from other clients’ data?
5. Configurability and customization: What client-side configurations are necessary/available? What are the expected resource commitments from the institution’s Department of IT? Can our institution customize terminology to fit our business process?
6. Identify which components of your CRM (if any) are supported by third-party technology partners.

Implementation, Training, Project Management and Support

1. Please describe your suggested timeline and strategy for implementation including the makeup and background of your company’s leadership and implementation team
2. How quickly your company is typically able to begin implementation after contracting with an institution
3. Anticipated number of hours for professional services and personnel and campus personnel
4. On-site vs. Off-site implementation support
5. Training and knowledge transfer strategies for functional and technical users
6. Methods and options for providing ongoing training and support for new features, functionality, and other updates. Are there certification opportunities?
7. Amount of documentation provided and how it is delivered/updates
8. Please describe your commitment to client support including: what types of users can submit a support request and how those requests are submitted, support team hours of operation and response rates, and components of your CRM (if any) that require support from third-parties.

Additional Modules, Functionality, and Future Plans for Development

1. What tools are available to extend use of the CRM to include additional modules to other functional areas throughout the student life-cycle?
2. Please tell us your roadmap for the next 12 months. What will your organization be working on? Provide a timeline and descriptions for anticipated modules, costs and functionality.
3. Please tell us your typical timeline and calendar for updates, patches and product improvements.

Data Ownership and Access

1. Security & Incident Response: The Vendor must notify Casper College within 72 hours of any suspected data breach. High priority response is defined as incidents causing critical system outages or severe business impact) within two (2) hours of Casper College's notification, 24x7x365. Notification shall include, at a minimum, the nature of the incident, the data affected, and steps taken to mitigate the incident.

2. Data Access & Ownership: The Casper College retains exclusive ownership of all data, derivatives, and metadata. The Vendor will provide secure, automated nightly downloads and, upon request or termination, data dictionary, attachments and files, a complete export of all data (including audit logs and ERD/schemas) in open formats like CSV, JSON, or XML. The vendor shall provide, automated nightly download of all Casper College data in a mutually agreed-upon format. The Client shall have the right to access and retrieve its data at any time during the License Term.

3. Accountability & Indemnification: The Vendor is fully liable for the security and integrity of cloud-hosted data and must comply with all applicable laws. Additionally, the Vendor indemnifies Casper College for all costs associated with vendor-caused data breaches, such as notification and regulatory fines.

4. Protection & Recovery: The Vendor must implement administrative and technical safeguards to ensure data confidentiality. They are also required to maintain and regularly test disaster recovery plans, providing summaries to Casper College upon request. The VENDOR acknowledges and agrees that, notwithstanding the cloud-hosted nature of the SOFTWARE, that they will remain fully responsible and liable for the security, confidentiality, and integrity of Casper College data, and for compliance with all applicable laws and contractual obligations.

SECTION *5*: PROPOSAL FORMAT

1. **Letter of Interest / Introduction:** This letter shall explain your overall desire to be awarded this contract(s) and an introduction of your company and its employees. The letter shall contain the name, address, and phone number of the person who will serve as the principal contact and who will be making the presentation on behalf of your company. The letter shall bear the signature of the person having proper authority to make formal commitments on behalf of your company.
2. **Experience:** Submittals will include a detailed description of your company's overall capabilities, experience and approach in providing the scope of services described. It will also detail the number of years your company has been in business and any projects you have been awarded that are similar in nature.
3. **Qualifications of Key Personnel:** Submit qualifications of those who will be involved in completing the scope of services.
4. **References:** Provide references for similar projects and list three (3) to five (5) comparable higher education institutions on the Ellucian Colleague Student Information System that have been implemented and are currently using your CRM solution who we may contact as references. Include the names of the organizations, a brief summary of work done, and the names, phone numbers, and e-mail addresses of contact persons.
5. **Hosting Options:** If your solution has different hosting options available and wish to present more than one, please indicate this in your response and provide separate cost proposals for each.
6. **Pricing:** Provide a total cost of ownership for the complete CRM solution as proposed including licensing, hosting, implementation services, third party solutions etc. Costs should cover five (5) years showing separate annual costs.
7. **Contracts:** If your company requires a contract to be signed, please provide a sample copy with your proposal.

Notes:

Proposed prices must be "all-inclusive". This includes but is not limited to the requirements listed in the RFP.

SECTION *6:* EVALUATION CRITERIA

Proposals will be evaluated on, but not limited to, the following criteria (not necessarily in priority order).

1. **Pricing:** Although a concern, the bidder with the most favorable pricing may not necessarily be awarded the order.
2. **Specifications/Qualifications:** Bidder has met the terms, criteria, and qualifications that are viewed to be necessary and or essential components of this proposal in the opinion of the evaluation committee.

3. **Hardware/Software:** Proposed hardware and software quality and how well it will integrate with our existing infrastructure.
4. **Quality of Materials:** Are the products being proposed of acceptable quality?
5. Reputation: Information acquired through references and other sources available to Casper College. Results of previous projects (if any) on our campus.
6. **Vendor Stability & Experience:** Length of time the vendor has been in business and amount of experience with Higher Education Institutions.
7. **Value-Added Concepts:** Items or ideas that are not listed in this RFP that may further enhance and provide measurable value to the college.
8. Innovation/Creativity: Proposals that identify new or innovative approaches.

The Casper College IT and Purchasing Department will review proposals. If this project is awarded it will be based on, but not limited to, the above criteria.

AWARD OF CONTRACT

1. The award(s) will be made to the bidder(s) whose proposal will be the most advantageous to Casper College, considering, but not limited to, the factors shown in the evaluation criteria. Negotiations may be a part of the award process at the option of the college.
2. The agreement shall be for a period of one (1) year with an option to renew each year after, not to exceed a total of five (5) years. A renewal after the first year and each year thereafter will be at the option of Casper College. At our option we may elect to renew this contract for an additional five (5) years with the same yearly renewal processes as note above.
3. Consideration of the factors enumerated herein and the award(s), if any, shall be at the sole discretion of Casper College.

4. Casper College intends to award this on an initial five (5) year contract. Following the initial five-year term, Casper College reserves the right, at its sole discretion, to extend the contract for an additional period of up to five (5) years, to be exercised on a year-to-year basis.

CONTRACT REQUIREMENTS

1. Awarded bidder is prohibited from subcontracting, assigning, or transferring, the contract, its rights, title or interest therein or its power to execute such agreement to any other bidder, firm, company or corporation without the prior written consent of Casper College. All approved assignments or other transfers referred to herein must abide by the provisions of the agreement.

2. The College or the awarded bidder may terminate the contract without cause upon thirty (30) days written notice. The contract may be terminated immediately for cause if the bidder fails to perform in accordance with the terms and conditions of the contract.

3. The contract may be terminated if funds are not appropriated or allocated to the college by governmental entities that are necessary, in the sole discretion of Casper College, to complete the terms of the contract.

4. We prefer no more than 30 total pages in your sealed proposal. Please include a minimum of 4 copies.

INVOICING AND PAYMENT

1. Invoices totaling $10,000 or more will be approved once each month at the Casper College Board meeting. This meeting is normally held the third Tuesday of each month. Completed invoices must be in the possession of accounts payable the Wednesday before the third Tuesday to be considered for payment. All invoices shall be forwarded to: Casper College, Accounts Payable, 125 College Drive, Casper, WY 82601. No late fees will be paid by the College.

SECTION *7: BID FORM*

Casper College – Bid Form

Constituent Relationship Management (CRM) Solution

CC609-26

Bidder Name: ____

Primary Contact Name/Title: ______________________________________

I. Total Cost of Ownership (5-Year Projection)

Provide all-inclusive pricing for each category. Costs must include all requirements listed in the RFP.

Expense Category	Year 1	Year 2	Year 3	Year 4	Year 5	5-Year Total
Software Licensing/SaaS Fees	$	$	$	$	$	$
Hosting Fees (if separate)	$	$	$	$	$	$
Implementation & Training Services	$	$	$	$	$	$
3rd Party Integration/Solution Fees	$	$	$	$	$	$
Ongoing Support/Maintenance	$	$	$	$	$	$
TOTAL ANNUAL COST	$	$	$	$	$	$

II. Technical Requirements & Compliance Checklist

Indicate "Yes," "No," or "Variance" for each requirement. If "Variance," please attach a detailed explanation.

Category	Requirement	Meets? (Y/N/V)
SIS Integration	Native Ethos integration with Ellucian Colleague	____________
Security	FERPA-compliant and HECVAT/SOC 2 compliant	____________
Data Privacy	All data stored and processed exclusively in the U.S.	____________
Communication	Built-in two-way SMS/texting and bulk email capabilities	____________
SSO	Support for Single Sign-On (SAML, OIDC)	____________
Fraud Detection	Built-in risk-based scoring and automated identity checks	____________
AI Capabilities	AI-powered content generation and chatbot functionality	____________

III. Professional Services & Implementation

- **Proposed Implementation Timeline (Weeks/Months):** ____________________
- **Total Professional Service Hours (Anticipated):** ____________________
- **Training Delivery Method:** [ ] On-site [ ] Off-site [ ] Hybrid

IV. References (Higher Education - Ellucian Colleague)

List 3-5 comparable institutions currently using your CRM solution with Ellucian Colleague SIS.

1. **Institution:** ____________________ **Contact:** ____________________
   Email/Phone: ____________________
2. **Institution:** ____________________ **Contact:** ____________________
   Email/Phone: ____________________
3. **Institution:** ____________________ **Contact:** ____________________
   Email/Phone: ____________________

V. Authorized Signature

By signing below, the bidder certifies that the prices offered are all-inclusive and that the company has not acted in collusion with any other bidder.

Signature:_________________________ Printed Name:_______________________
Date: ____________________________