RFP No: #27-111326 – Customer Relationship Management (CRM) Platform

YOUNGSTOWN STATE UNIVERSITY
REQUEST FOR PROPOSAL

Date Issued: November 13, 2026

Due Date/Time: December 11, 2026 2:00 PM

RFP #27-111326 – Customer Relationship Management (CRM) Platform

Youngstown State University seeks a scalable, configurable CRM supporting recruitment, enrollment, student services, advising, retention, graduation, alumni engagement, and advancement. The solution should maintain consistent identities and interaction histories, coordinate communication and referrals, and reduce manual processes and duplicate entry while preserving functional ownership, privacy, role-based access, and system-of-record authority.

These services must be in accordance with the terms, conditions and requirements set forth in this Request for Proposal (RFP).

Proposals must be received by the due date/time specified above at the location below. Proposals received after the due date/time may be returned unopened to the Vendor.

Sign and deliver proposal, cover sheet, and schedules to:
Mailing Address:

Procurement Services
Jones Hall – 2nd Floor
Youngstown State University
1 Tressel Way
Youngstown, Ohio 44555

Phone: 330-941-3117
Attention: Barb Greene

Envelopes must be sealed and designated- RFP No: #27-111326 – Customer Relationship Management (CRM) Platform

Note:

1. **No public proposal opening will be held due to the complexity of responses and need for committee review.**
2. **Completed Proposal Packages need to be received via a packet that includes an original printed hard copy and a flash drive. Email bids are permitted. Email: bgreene@ysu.edu.**
3. **Final results will be posted on the Procurement Services Competitive Events.**

By signing this document, I am agreeing, on behalf of my firm, to the specifications of this RFP and accepting, without exception or amendment, YSU's Purchase Order Terms and Conditions.

Submitted by: Company _____

Authorized Signature _____

Name_____
(Printed Name) (Title) (Date)

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RFP TIMELINE AND SCHEDULE

- **RFP ISSUED: Friday, November 13, 2026**
- **RFP QUESTIONS DUE: Monday, November 23, 2026**
- **RESPONSES TO QUESTIONS: Monday, November 30, 2026**
- **RFP CLOSING DATE: Friday, December 11, 2026 2:00 PM**
- **PRESENTATIONS for FINAL SELECTEES: January 19, 2027, through January 22, 2027**
- **SELECT SUPPLIER / NEGOTIATE CONTRACT (on or around): January 29, 2027**
- **CONTRACT BEGIN DATE (on or around): July 1, 2027**

About YSU

Youngstown State University is part of the University System of Ohio, which consists of 14 public universities, 24 branch campuses, 22 community colleges and over 120 adult workforce education centers and training programs. The University's tuition consistently ranks among the lowest in the state of Ohio, making YSU an affordable option for its 12,420 students. Founded in 1908 under the sponsorship of the Young Men's Christian Association, the University was originally established as the School of Law of the Youngstown Association School. Re-chartered in 1921 as the Youngstown Institute of Technology, in 1928 as Youngstown College and in 1956 as Youngstown University, the University joined the Ohio system of higher education in 1967 and became Youngstown State University. Today, the University offers more than 151 major areas of study, including over 106 undergraduate programs and 45 graduate programs, including ten doctoral degrees, as well as several certificate programs and academic tracks. Find more information online at www.ysu.edu.

SECTION I
Definitions

Relative to this document, and any addenda incorporated therein, the following definitions apply.

Addendum: A written instrument, issued solely by YSU that details amendments, changes or clarifications to the specifications and terms and conditions of this RFP. Such written instrument shall be the sole method employed by YSU to amend, change or clarify this RFP, and any claims (from whatever source) that verbal amendments, changes or clarifications have been made shall be summarily rejected by YSU.

Agreement, Contract or Purchase Order: Award resulting from the RFP or Request for Quotation.

Bidder, Vendor, Awardee, Supplier: Respondent to the RFP or Request for Quotation.

May, Should: Indicates something that is requested but not mandatory. If the Vendor fails to provide requested information, YSU may, at its sole option, either request that the Vendor provide the information or evaluate the proposal without the information.

Proposal, Quotation: Response provided by Vendor.

Proposal Closing Date: The date and time specified in this RFP by which the quotation or proposal must be received by YSU Procurement Services in accordance with Section II of this RFP. Proposals received after such date and time may not be considered.

RFP: Request for Proposal.

Shall, Must, Will: This indicates a mandatory requirement. Failure to meet mandatory requirements may invalidate the proposal or result in rejection of a proposal or quotation as non-responsive.

SECTION II
YSU Standard RFP Instructions and Agreement Terms

Vendors are cautioned to read this entire document carefully and to prepare and submit their response providing all requested information in accordance with the terms and conditions set forth herein. To be considered, Vendors must submit a complete response to this RFP in the format detailed by the specifications. Proposals must be dated, signed by an official authorized to bind the Vendor to the terms of the proposal and submitted to YSU in accordance with the instructions, terms and conditions of this RFP.

Youngstown State University reserves the right to:

- Accept or reject any or all proposals, or any part thereof, or to withhold the award and to waive, or to decline to waive, irregularities in any proposal when determined that it is in its best interest to do so;
- Hold all proposals for a period of up to ninety (90) days after the opening date and accept a proposal not withdrawn before the scheduled proposal opening date;
- Waive any informality or technicality contained in any proposal received;
- Waive any minor or major defect in the proposal;
- Conduct discussions with respondents and accept revisions of proposals after the closing date;
- Make an award based upon various selection criteria;
- Request clarification from any Vendor on any or all aspects of its proposal;
- Cancel and/or reissue this RFP at any time;
- Retain all proposals submitted in response to this RFP;
- Invite some, all, or none of the Vendor(s) for interviews, demonstrations, presentations and further discussion;
- Negotiate a possible contract and potentially solicit "best and final offers" from some or all respondents prior to or during this negotiation process;
- Award to one, some, or none of the Vendors who submit proposals.

Proposals received after the time for closing may be considered invalid.

Apart from the contact required for any on-going business at YSU, Vendors are specifically prohibited from contacting any individual at, or associated with, YSU regarding this RFP. Vendor communication shall be limited to the contact named on the cover page of this document.

RFP Terms and Instructions:

1. Agreement Extension: YSU reserves the right to extend any agreement resulting from this RFP beyond the normal expiration date if YSU determines it to be in their best interest and the selected Vendor(s) agrees to the extension.

2. Assignment: Any agreements entered into as a result of this offering may not be assigned by the selected Vendor without the expressed written consent of YSU and the participating members.

   Compliance: Vendor warrants that both in submission of its proposal and performance of any resultant purchase order or contract, Vendor will comply with all applicable Federal, State, and local laws, regulations, rules, and/or ordinances.

3. Confidential Information: Any and all information, the release of which is prohibited by State or Federal law or regulation, including but not limited to the protections of the Family Educational Rights and Privacy Act (FERPA), and the Gramm Leach Bliley Act (GLBA) constitutes Confidential Information. Vendor agrees to hold the Confidential Information in strictest confidence. Vendor shall not use or disclose Confidential Information received from or on behalf of University or any of its students, faculty, or staff except as permitted or required by contract or by law, or as otherwise agreed to in writing by the University. Vendor shall implement, maintain, and use appropriate administrative, technical, and physical security measures to preserve the confidentiality, integrity, and availability of all electronically maintained or transmitted Confidential Information. Service Organization Control (SOC) Audit reports must be available if applicable to this event. Vendor shall abide by the Privacy and Security Rules as set forth by the Health Insurance Portability and Accountability Act of 1996 (HIPAA).

4. Conflicts of Interest and Ethics Compliance: No personnel of Vendor or member of the governing body of any locality or other public official or employee of any such locality in which, or relating to which, the work under this Agreement is being carried out, and who exercise any functions or responsibilities in connection with the review or approval of this Agreement or carrying out of any such work, shall, prior to the completion of said work, voluntarily acquire any personal interest, direct or indirect, which is incompatible or in conflict with the discharge and fulfillment of his or her functions and responsibilities with respect to the carrying out of said work. Any such person who acquires an incompatible or conflicting personal interest, on or after the effective date of this Agreement, or who involuntarily acquires any such incompatible or conflicting personal interest, shall immediately disclose his or her interest to YSU in writing. Thereafter, he or she shall not participate in any action affecting the work under this Agreement, unless YSU shall determine in its sole discretion that, in the light of the personal interest disclosed, his or her participation in any action would not be contrary to the public interest.

5. Ethical Conduct: It is expected that once an agreement is issued, Vendors (awarded or not awarded) will not undertake any actions that might interfere with, or be detrimental to, the contractual obligations of YSU. YSU reserves the right to take any and all actions deemed appropriate in response to unethical conduct by a Vendor. Such actions include, but are not limited to, establishing guidelines for campus visits by a Vendor, and/or removal of a Vendor from YSU's Vendor list(s).

6. Contact: Apart from the contact required for any on-going business at YSU, Vendors are specifically prohibited from contacting any individual at or associated with YSU regarding this RFP. Vendor communication shall be limited to the contact named in this RFP document. A Vendor's failure to adhere to this prohibition may, at YSU's sole discretion, disqualify the Vendor's proposal.

7. Evaluation: If an award is made, the Vendor(s) whose proposal, in the sole opinion of YSU, represents the best overall value to YSU will be selected.

8. Findings for Recovery (Ohio Revised Code Section 9.24): Ohio Revised Code (O.R.C.) Section 9.24, prohibits the State from awarding a contract to any Vendor against whom the Auditor of State has issued a finding for recovery if the finding for recovery is "unresolved" at the time of award. By submitting a proposal, Vendor warrants that it is not now and will not become subject to an "unresolved" finding for recovery under O.R.C. 9.24, prior to the award of any contract arising out of this RFP, without notifying YSU of such finding.

9. Hold Harmless: It is understood that the Vendor, if awarded an Agreement agrees to protect, defend, indemnify, and save harmless YSU from any claims suits or demands for payment that may be brought against it due to the acts, errors or omissions of Vendor in providing the services under this agreement.

10. Incurred Expenses: The Vendor, by submitting a proposal, agrees that any costs incurred by responding to this RFP or in support of activities associated with this RFP shall be the Vendor's sole responsibility and may not be billed to YSU. YSU will incur no obligation of liability whatsoever to anyone resulting from issuance of, or activities pertaining to this RFP.

11. Minimum Insurance Coverages and Requirements:

    The selected Vendor(s) shall obtain and maintain the minimum insurance coverage set forth below. By requiring such minimum insurance, YSU shall not be deemed or construed to have assessed the risk that may be applicable to the selected Vendor(s). The selected Vendor(s) shall assess its own risks and, if it deems appropriate and/or prudent, maintain higher limits and/or broader coverages.

    The selected Vendor(s) is not relieved of any liability or other obligations assumed or pursuant to the contract by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types.

Coverages:

A. Commercial General Liability: ISO form CG0001 or its equivalent. Coverage to include:
   - Premises and Operations
   - Personal Injury/Advertising Injury
   - Products/Completed Operations
   - Liability assumed under an Insured Contract (including tort liability of another assumed in a business contract)
   - Independent Contractors

Limits Required: The selected Vendor(s) shall carry the following limits of liability: Minimum Insurance Requirements.

Additional Requirements:

Commercial General Liability (CGL) must include coverage for liability arising from products-completed operations and liability assumed under an insured contract.

If the CGL insurance has a general aggregate limit, then ISO endorsement CG2504 (03/97 Edition) or its equivalent must be added. The Designated Location(s) General Aggregate Limit must be maintained for the duration of the agreement, and the limit must be twice the minimum required occurrence limit.

The selected Vendor(s) shall name YSU and its Board of Trustees, officers, employees, agents, and volunteers as Additional Insureds on ISO endorsement CG 2026 or its equivalent.

The CGL policy shall contain no endorsement or modification limiting the scope of coverage for liability assumed under a contract or liability arising from pollution.

All Policies:
- Must be written on a primary basis, non-contributory with any other insurance coverages and/or self-insurance carried by YSU.
- Must include a Waiver of Subrogation Clause.
- May not be non-renewed, cancelled, or materially changed or altered unless thirty (30) days advance written notice via certified mail is provided to YSU.

12. Non-Discrimination: In submitting their proposal, or performing that which results from an award by YSU, the successful Vendor agrees not to discriminate against any employee or applicant for employment with respect to hire, tenure, terms, conditions or privileges of employment or any matter directly or indirectly related to employment because of race, color, creed, religion, sexual orientation, national origin, sex, age, handicap or Vietnam era veteran status. The successful Vendor further agrees that every sub-contract for parts and/or service for any ensuing order will contain a provision requiring non-discrimination in employment as specified above. This covenant is required pursuant to Executive Order 11246, Laws and Regulations of the State of Ohio. Any breach thereof may be regarded as material breach of contract or purchase order.

13. Prohibition of Offshore Outsourcing: The Vendor affirms to have read and understands Executive Order 2019-12D and shall abide by those requirements in the performance of this Contract and shall perform no services required under this Contract outside of the United States.

    Governor's Executive Order 2019-12D

    The Vendor also affirms, understands, and agrees to immediately notify YSU of any change or shift in the location(s) of services performed by the Vendor or its sub-contractors under this Contract, and no services shall be changed or shifted to a location(s) that is (are) outside of the United States.

The Vendor also agrees to disclose if requested by YSU all of the following:

- The location where all services under this Contract will be performed by any Vendor;
- The location where any state data associated with any of the services the Vendor is performing under this Contract, or seek to provide will be accessed, tested, maintained, backed up or stored;
- The principle location of business for any Vendors supplying services under this Contract.

If any Vendor performs services under this Contract outside the United States, the performance of such services shall be treated as a material breach of the contract. YSU is not obligated to pay and shall not pay for such services. If any Vendor performs any such services, Vendor shall immediately return to YSU all funds paid for those services. YSU may also recover from the Vendor all costs associated with any corrective action YSU may undertake, including but not limited to an audit or a risk analysis, as a result of the Vendor performing services outside the United States.

YSU may, at any time after the breach, terminate the Contract, upon written notice to the Vendor. YSU may recover all accounting, administrative, legal and other expenses reasonably necessary for the preparation of the termination of the Contract and costs associated with the acquisition of substitute services from a third party.

If YSU determines that actual and direct damages are uncertain or difficult to ascertain, YSU in its sole discretion may recover a payment of liquidated damages in the amount of two percent of the value of the Contract.

YSU in its sole discretion may provide written notice to Vendor of a breach and permit the Vendor to cure the breach. Such cure period shall be no longer than 21 calendar days. During the cure period, YSU may buy substitute services from a third party and recover from the Vendor any costs associated with acquiring those substitute services.

Notwithstanding, YSU permitting a period of time to cure the breach or the Vendor's cure of the breach, YSU does not waive any of its rights and remedies provided YSU in this Contract, including but not limited to recovery of funds paid for services the Vendor performed outside of United States, costs associated with corrective action, or liquidated damages.

The Vendor will not assign any of its rights, nor delegate any of its duties and responsibilities under this Contract, without prior written consent of YSU. Any assignment or delegation not consented to may be deemed void by YSU.

14. Pricing: Vendors are asked to thoroughly explain their pricing structure in their response. YSU reserves the right to negotiate this and other pertinent terms with the selected finalist(s) and this could become one of the selection criteria used in the award process.

15. Proprietary Information: All evaluation criteria for proposals are non-proprietary and subject to public disclosure after Contract award. All proposals, except for items reasonably identified by Vendor as trade secrets or proprietary information, are subject to public disclosure under Ohio Revised Code Section 149.43. Vendor shall be solely responsible for protecting its own trade secret or proprietary information and will be responsible for all costs associated with protecting this information from disclosure.

16. Provisions: If any provisions in the resultant Agreement are held to be invalid, void, or unenforceable, the remaining provisions shall nevertheless continue in full force and effect without being impaired or invalidated in any way.

17. Quality of Service: The successful Vendor(s) must be prepared to furnish continual high-quality service to YSU. Failure to do so may be considered just cause for cancellation of the Agreement.

18. Right to Set-Off: Upon the occurrence of any default or breach of an Agreement resulting from this RFP by Vendor, University shall have the right to withhold and set-off against any amount otherwise due to be paid to Service Provider, for the amount of any such cost, loss, damage, expense, liability, obligation or claim resulting from Vendor's default or breach of this Agreement. Neither the exercise of, nor the

failure to exercise, such right of set-off will constitute an election of remedies or limit the University in any manner in the enforcement of any other remedies that may be available to it.

19. Sales Tax: YSU, as an instrumentality of the State of Ohio, is exempt from Ohio sales tax and Federal excise tax, including Federal transportation tax. An exemption certificate will be furnished by YSU upon request.

20. State Law: Any agreement entered into as a result this solicitation will be governed by the laws of the State of Ohio.

21. Use of Data: Vendor agrees that it will keep confidential the features of any technical or proprietary information furnished by YSU and use such items only in the production of items awarded as a result of this inquiry and not otherwise, unless YSU's written consent is first obtained.

22. Contract Term
    a. The University intends to award multi-year Agreements. The length of the Agreements will be negotiated by the parties.
    b. The University maintains the right to terminate this Agreement and any additions upon failure of the Vendor to abide by the terms and conditions of the Agreement and performance specifications. The University will give sufficient notice to correct all outstanding issues and deficient performance connected to this Agreement. If not corrected in the specified time, the University may notify the Vendor, in writing, of the intent to terminate the Agreement. The Agreement will be terminated sixty (60) days after notification.
    c. No subcontracting or assignment of Agreement without prior written consent and approval of the University.

23. Revisions to RFP
    a. In the event that it becomes necessary to revise any part of this RFP prior to the assigned return date, revision will be provided by YSU's Procurement Services, or designee, to all respondents involved in the RFP. Changes in the specifications will be provided to all respondents through an addendum made by Procurement Services.
    b. YSU will be the sole determinant of whether any revisions/addenda should be issued as a result of any question or other matters, and may extend the proposal deadline, if in YSU's judgment such information significantly amends this solicitation, or makes compliance with the original proposed due date impractical.

24. Selection Criteria
    The successful Proposer, if any, selected by the University through this RFP will be the Proposer that submits a proposal on or before the Submittal Deadline and that is the most advantageous to the University. Contractor means the successful Proposer under this RFP.

    Proposer is encouraged to propose terms and conditions offering the maximum benefit to the University in terms of (1) service, (2) total overall cost, and (3) project management expertise.

    The evaluation of proposals and the selection of Contractor will be based on the information provided in the proposal. The University may consider additional information if the University determines the information is relevant.

SECTION III
RFP Response Instructions

1. Vendors must submit questions to bgreene@ysu.edu. All questions must be submitted via email as indicated on the Schedule of Events and include **RFP No: #27-111326 – Customer Relationship Management (CRM) Platform** in the subject line. Questions submitted by the deadline will be answered via email and will be sent to all RFP participants.

2. During the YSU competitive proposal process, up to and including the issuance of an award letter, under no circumstances may a Vendor contact other individuals at YSU to discuss any aspect of this inquiry or attempt to influence the process. Failure of a Vendor to comply with this protocol may invalidate their proposal response.

3. Proposal Instructions
   a. Complete the RFP cover sheet (page 1 of this RFP)
   b. Complete Section IV of this RFP by submitting your responses directly into your proposal.
   c. Proposal Package Requirements. The following MUST be included in the proposal-response package by the proposal due date/time; failure to do so may invalidate the proposal response:
      (1) Signed and dated RFP cover sheet.
      (2) Proposals exactly as specified in this RFP in both hard copy and on a flash drive.
      Note: Some proposals may take time to be received by the email inbox, especially with larger files attached, so please send your proposal email in advance of the deadline and early enough to consider receipt lead time
      (3) Provide a Gantt chart outlining the implementation milestones and resource requirements by the vendor and YSU resources.
      (4) Agreement to all terms required within this RFP.

Purpose and Enterprise Requirements

Youngstown State University seeks a scalable, configurable CRM supporting recruitment, enrollment, student services, advising, retention, graduation, alumni engagement, and advancement. The solution should maintain consistent identities and interaction histories, coordinate communication and referrals, and reduce manual processes and duplicate entry while preserving functional ownership, privacy, role-based access, and system-of-record authority.

- Provide email, two-way SMS, automated workflows, case and appointment management, searchable knowledge, shared dashboards, self-service reporting, and analytics.
- Describe transparent and auditable artificial intelligence features, human-review controls, and the ability to disable optional AI without losing core CRM functions.
- Integrate with Banner, planned Banner SaaS, and other University systems; support reliable synchronization, historical migration, documented APIs, and data portability.
- Provide security, recovery, accessibility, mobile access, and applicable FERPA protections.
- Provide phased implementation, training, ongoing support, defined governance, functional and technical acceptance, and administrator-managed configuration.
- For each requirement, identify whether functionality is included, requires another product/module or custom development, is planned for future release, or is unavailable; disclose costs and YSU staffing needs.

SECTION IV
Scope of Work

1. Strategic Enrollment Management

The solution should support Admissions, Financial Aid and Scholarships, Registrar functions, and the Penguin Service Center.

- Manage the enrollment lifecycle from inquiry through enrollment, including population-specific workflows, applications, documents, reviews, decisions, and next steps.
- Support recruiter assignments, territories, tasks, campus visits, recruitment events, and personalized communications.
- Identify stalled students, eligible but unregistered students, and enrollment barriers; enable proactive, coordinated follow-up.

- Track incomplete financial aid requirements; automate reminders for documents, deadlines, award acceptance, and scholarship requirements; provide secure document submission.
- Support scholarship matching, review, selection, and notification through native functionality or approved integration.
- Provide authorized access to registration, program, academic standing, holds, degree-progress, and graduation information; connect to degree audit and planning tools.
- Support records requests, transfer-credit workflows, graduation processing, course-demand and scheduling-bottleneck identification, and targeted registration/records/graduation/schedule-change communications.
- Provide a shared service workspace with interaction history, case ownership, referrals, escalation, resolution, appointments, walk-ins, queues, and searchable staff knowledge.
- Report on recruitment sources, applications, admission, yield, enrollment, summer melt, financial aid and scholarships, enrollment barriers, and service metrics (response/resolution times, repeat contacts, unresolved cases).
- Describe available prospective-student and counselor portals, transfer planning, forecasting, campaign-effectiveness analysis, and enrollment prediction; support existing admissions functionality/integrations or propose approved replacements.

2. Student Success, Advising, and Retention

The proposed solution should:

- Provide a role-appropriate unified student record with academic, registration, advising, engagement, communication, case, referral, and support information.
- Support advisor assignments, caseloads, assignment history, and manager oversight.
- Provide an advisor workspace with prioritized tasks, alerts, appointments, registration gaps, and follow-up.
- Support notes, referrals, alerts, cases, reassignment, escalation, and closure.
- Support student self-scheduling and individual, pooled, group, virtual, and in-person appointments.
- Support configurable multistep follow-up workflows.
- Identify registration barriers, academic recovery needs, retention risk, and approaching degree completion.
- Provide operational and predictive retention analytics, and assess interventions against registration, persistence, retention, and completion outcomes.
- Enable appropriate sharing of information and referrals with Strategic Enrollment without unnecessary duplicate entry.

3. Alumni Engagement and Advancement

The proposed solution should:

- Maintain constituent records with appropriate biographical, academic, relationship, engagement, and philanthropic information.
- Support the transition from graduating student to alumni status.
- Track constituent relationships, affiliations, events, communications, volunteerism, philanthropy, and other engagements.
- Support segmentation for communications, events, cultivation, prospect identification, and engagement.
- Provide configurable dashboards, geographic analysis, historical trends, engagement metrics, and predictive analytics.
- Support alumni events, involvement tracking, and University-defined engagement scoring/classification.
- Support automated imports, data cleansing, address updates, and third-party enrichment.
- Integrate with applicable communication, event-registration, Banner, and data-enrichment platforms.
- Track email engagement directly to the alumni database, rather than exporting opens and uploading individual campaigns
- Track social media followers as an involvement in the alumni database (same as email)

- Integrate with Live Alumni or a similar data enrichment platform, by bringing data captured into alumni records
- Integration with event registration platforms, so that event participation and contact information updates can be connected to the alumni record.
- Instead of exporting data for address updates, it would be helpful if cleansing can happen more easily within the system.
- Some type of engagement scoring or ability to classify level of involvement based on participation in modes such as volunteerism, philanthropy, communication and events
- A business intelligence solution within the system that could offer more robust dashboards, interactive visualizations, geographic analysis, historical trend reporting, and predictive analytics.
- Current search and query capabilities when creating target audiences based on varied factors are limited and require a lot of manual oversight.
- We would like to tie events and involvements to metrics and data visualization, to show where prospects are located, how many exist, and how much engagement potential they represent. This would support more personalized and strategic outreach.
- Imports have limitations and heavy reliance on manual processes. A significant improvement would be moving towards automated integrations to a centralized data warehouse. Unifying information from multiple systems would reduce dependence on IT and manual data preparation by designing real-time import monitoring, notifications, and self-service reporting capabilities.
- Enhanced data visualization with interactive dashboards to explore relationships in interactive maps and improve geographic analysis. We would like to analyze data over multiple years to identify patterns and make future predictions.

4. Information Security, Privacy, and Compliance

Respondents must provide specific descriptions and supporting documentation, where applicable, demonstrating the following controls:

- Encryption of data at rest and in transit (minimum AES-256 and TLS 1.2 or higher).
- Single Sign-On (SSO/SAML), multi-factor authentication, granular role-based permissions, and appropriate administrative/service account controls.
- Applicable compliance certifications and assessments (such as SOC 2 Type II or ISO 27001) and applicability of GDPR, HIPAA, CCPA, FERPA, and other legal requirements.
- Documented data residency/sovereignty, audit logs, user activity tracking, vulnerability management, and penetration testing cadence.
- Documented incident response and breach-notification timelines.
- Security and digital-accessibility documentation, including HECVAT and VPAT/Accessibility Conformance Reports where applicable.

5. Enterprise Integration and Interoperability

Respondents must explain the technical approach and costs for connecting the CRM to the University enterprise environment:

- Supported APIs, webhooks, middleware and file-based interfaces, including documentation, authentication, rate limits, limitations, and fees.
- Demonstrated experience integrating with Ellucian Banner; support for YSU’s current Banner environment, the transition to Banner SaaS, and the future SaaS environment without dependence on direct database access.
- Integration with Microsoft 365, Blackboard, identity management, degree audit/planning, reporting platforms, and approved third-party applications.
- Real-time, scheduled, and bidirectional data exchange where appropriate, with synchronization, monitoring, error handling, reconciliation, and notifications.

- Identification of required third-party components, custom integrations, technical dependencies, implementation and maintenance responsibilities, and associated costs.

6. Data Governance, Migration, and Portability

The proposed solution must support institutional data stewardship and approved historical migration:

- Authoritative systems of record, institutional data ownership, source precedence, identity matching, deduplication, validation, and data-quality management.
- Migration of approved historical records, communications, notes, cases, attachments, relationships, and associated history from existing CRM systems.
- Documented data mapping, cleansing, trial migrations, validation, reconciliation, and resolution of discrepancies before production deployment.
- Appropriate access controls, auditability, retention, and archival capabilities.
- YSU ownership of institutional data and documented access, export, and portability in complete, usable, documented formats during the contract and upon termination.

7. Application Administration, Configuration, and Mobile Access

The solution should enable trained University staff to manage routine functions with limited dependence on external development:

- Administrative management of users, roles, permissions, forms, workflows, business rules, communications, dashboards, and reports.
- Routine configuration by authorized YSU administrators without vendor development or professional services, with all exceptions and limitations disclosed.
- Clear distinction among standard configuration, low-code/no-code features, custom development, vendor assistance, and additional licenses.
- Tools for testing, documenting, promoting, and controlling configuration changes across environments.
- Limits on custom objects and fields, technical skill requirements, and ongoing maintenance responsibilities.
- Mobile application capabilities, including offline functionality where available.

8. Reporting and Enterprise Data Access

The proposed solution must support operational and institutional reporting:

- Configurable dashboards, scheduled reporting, and self-service reports for authorized users.
- Documented extraction, access, and integration of CRM data into YSU enterprise reporting and analytics environments, including refresh options and costs.
- Access to historical CRM data, data definitions, and refresh information.
- Disclosure of reporting limitations, data-access restrictions, API/export limits, licensing requirements, and costs.

9. Infrastructure, Architecture, and Reliability

Vendors must document:

- Deployment model (SaaS/cloud, on-premises, or hybrid), tenancy architecture, and scalability limits for users, records, storage, and API calls.
- Uptime SLA (for example, 99.9%) and historical service availability.
- Disaster recovery/business continuity plans and recovery time and recovery point objectives (RTO/RPO).
- Sandbox, staging, testing, and production environments.
- Identity and access integrations, SSO, MFA, and administrator/service account arrangements.

10. Technical Implementation, Support, and Release Management

Respondents must describe the full technical delivery and long-term maintenance model:

- Integration development, migration, testing, validation, and production transition approach.
- Vendor, YSU, and third-party responsibilities, required technical skills, and estimated University staffing effort.
- Technical documentation, administrator training, test environments, and knowledge transfer.
- How integrations and configurations remain supported through upgrades, platform changes, and the Banner SaaS transition.
- Support tiers, hours, response times, escalation, troubleshooting tools, and responsibility for ongoing solution maintenance.
- Release/update cadence, advance communications, regression testing, and sandbox validation before production.

11. Performance and Monitoring

The proposed platform must address:

- Page-load and response-time benchmarks at typical and peak utilization.
- System monitoring, alerting tools available to administrators, and system health and usage analytics.

12. Training, User Readiness, and Adoption

Respondents must provide a training and knowledge transfer plan aligned to implementation and ongoing operations:

- Role-based training tracks for managers, administrators, executives, and other users; core navigation, data-entry standards, dashboards, workflow automation, system configuration, user/security management, and relevant integrations.
- Live instructor-led training (on-site and/or virtual), self-paced modules, videos, searchable help, in-app guidance, and train-the-trainer programs.
- A dedicated training/test sandbox with sample data; downloadable guides, quick references and slide decks; customizable/co-branded materials; multilingual content where applicable.
- Training schedule relative to go-live, estimated hours by role, refresher training, and new-hire onboarding.
- Available certification programs, competency checks, assessments, and completion reporting.
- Customer success/adoption support after launch, feature-release training, peer communities, and usage analytics to identify adoption gaps.
- Full disclosure of included versus optional training costs, extra instructor-led sessions, and ongoing e-learning access fees.

13. Licensing and Cost Transparency

Vendors must provide a transparent accounting of one-time and ongoing costs, including:

- User licensing model (named, concurrent, tiered or other), licensing thresholds, and renewal terms.
- Storage growth charges, API limits and overage fees, and sandbox/test environment charges.
- Required and optional modules, integrations, third-party services, customization, implementation, data migration, training, and support.
- Costs and staffing implications for administration, reporting access, maintenance, Banner SaaS transition, and data export/contract termination.

14. Finalist Demonstrations

Finalists may be required to participate in scripted demonstrations using scenarios provided by YSU.

- YSU may require demonstration of actual production functionality included in the proposed solution, rather than conceptual presentations, screenshots, roadmap features, or products excluded from the proposal.

Vendor Qualifications

Proposers must demonstrate the qualifications, experience, technical expertise, and organizational capacity necessary to successfully implement, integrate, and support a comprehensive Customer Relationship Management (CRM) platform for Youngstown State University. At a minimum, proposers shall address the following qualifications:

- Demonstrate experience across all three functional areas
- Higher education experience
- Technical Integration and implementation experience
- Project management and implementation capacity
- Organizational stability and long-term support

References

Proposers must provide a minimum of three (3) higher education customer references for institutions where the proposed CRM solution has been successfully implemented.

For each reference, provide:

- Institution name and location.
- Contact person's name, title, telephone number, and email address.
- CRM product and modules implemented.
- Functional areas supported.
- Implementation date and length of the customer relationship.
- Current implementation status and scope of ongoing services.
- Relevant system integrations, particularly Ellucian Banner.

References from public universities, particularly institutions within the State of Ohio, are preferred.
YSU reserves the right to contact references, request additional information, and independently verify the vendor's qualifications, implementation experience, and performance history.

Pricing

The University requests that proposers provide a detailed pricing proposal for the product described in this RFP. Pricing should clearly identify any other anticipated costs necessary to complete the scope of work.

Contract Terms of Proposal

Proposers shall provide multiple contract term options, with a detailed breakdown of pricing, annual costs, renewal options, and any applicable discounts or incentives associated with each proposed contract term.

This contract, including any extension agreed to, may be canceled by YSU for just cause with thirty (30) days' notice in writing, sent by Certified U.S. Mail, to the contractor

The University and the Vendor will negotiate addendums to specifications and the financial terms during periods and thereafter.

No subcontracting or assignment of Agreement without prior written consent and approval of the University.

Revisions to RFP

In the event that it becomes necessary to revise any part of this RFP prior to the assigned return date, revision will be provided by YSU's Procurement Services, or designee, to all Respondents involved in the project.

Changes in the specifications will be provided to all Respondents through an addendum made by Procurement Services.

YSU will be the sole determinant of whether any revisions/addenda should be issued as a result of any question or other matters, and may extend the proposal deadline, if in YSU's judgment such information significantly amends this solicitation, or makes compliance with the original proposed due date impractical.

Written requests for proposal results must include the proposal name, number and closing date.

The Inter-University Council Purchasing Group

Please advise if your company has an interest in extending your offer to the Inter-University Council of Ohio's Purchasing Group (IUC-PG) membership. This is a courtesy request and there is no obligation to agree to it. It is not part of the University's selection criteria. Should you choose to extend usage, participation in the contract by other IUC-PG members is strictly voluntary on their part, and the University's sole role and responsibility would be to share the contents of the contract with them. In no way must any decision by your company to extend the contract to the IUC-PG members negatively affect the delivery capability, general service level, prices, discounts, product availability or other contractual obligations to the University.

Please indicate in your response package if your company agrees to extend any resulting contracts to include other IUC-PG members who may have an interest in utilizing it and describe any regional or geographic limitations.