

Request for Proposals

Consulting Services for Scholarship Program
and CRM Assessment, System Selection and
Implementation Planning



Issued September 25, 2026 | Deadline October 26, 2026, at 1:00 pm AKST

About Us

Mat-Su Health Foundation (MSHF) is the official business name of Valley Hospital Association, Inc., which shares ownership in Mat-Su Regional Medical Center (MSRMC). In this capacity, the MSHF board members and representatives actively participate in the governance of Mat-Su's community hospital and protect the community's interest in this important healthcare asset through board oversight. MSHF invests its share of Mat-Su Regional's profits into charitable works that improve the health and wellness of Alaskans living in Mat-Su.

Vision: A community where all persons have the opportunity for a healthy life

Mission: To Improve the Health and Wellness of Alaskans Living in the Mat-Su

Values: Belonging, Collaboration, Equity, Respect, Stewardship, and Transparency

Commitment to Health Equity

At MSHF, we believe health equity is achieved when everyone has access and opportunity to attain their full potential for health and well-being. We can work intentionally to reduce health disparities by understanding and addressing inequities and root causes. Engaging a variety of voices that reflect our unique community is instrumental in increasing health equity. As an organization and community partner, we are on a journey to learn and work toward health equity by understanding people's lived experiences, removing barriers, and improving opportunities for those marginalized by existing systems.

About Mat-Su

The Matanuska-Susitna Borough (Mat-Su) is situated on the ancestral lands of the Ahtna and Dena'ina peoples in Southcentral Alaska about 40 miles northeast of Anchorage. The Mat-Su covers 25,258 square miles, about the size of West Virginia, and has a population of about 117,000 people. The borough includes three incorporated cities – Palmer, Wasilla, and Houston; 26 rural/remote unincorporated communities; and two federally recognized Alaska Native Tribes.

The Mat-Su Borough continues to be one of the fastest growing regions in Alaska and the only region with consistently positive net migration. The Mat-Su gained 22,757 residents from 2010 to 2020, becoming the second-most populous borough in Alaska. Mat-Su is also becoming more diverse. During the same period, the percentage of Mat-Su residents identifying as a race other than white increased from 15% to 22% of the total Mat-Su population. In terms of percentage change this was a 79% growth in population compared to 10% growth in the white population. Residents identifying as two or more races are the second largest group at 11.5% (114% change from 2010 to 2020) followed by American Indian and Alaska Native alone at 6.4%.

Additionally, of the most populated boroughs in Alaska, Mat-Su has the fastest growing older adult population. From 2012 to 2022, the population 60 and over grew by 72.4% in Mat-Su compared to 40.7% for Alaska, 28.2% for Anchorage, and 37% for Fairbanks North Star Borough. Mat-Su is home to 16% of Alaska's veteran population, of which 26% experience a disability compared to 14% of the general population.

Background

Mat-Su Health Foundation (MSHF) provides scholarships to Mat-Su residents pursuing education and training in health-related, human services, and nonprofit management fields. The program supports undergraduate and graduate students, doctoral candidates, vocational certificates, and individuals pursuing workforce training. In addition, MSHF offers Professional Development and Training (PDT) scholarships that help strengthen organizational capacity by supporting training for staff, board members, and leaders of Mat-Su nonprofit, tribal, governmental, faith-based, and community organizations.

Demand for MSHF scholarship programs has grown significantly, with academic scholarship awards increasing by 88% over the past eight years. To support this growth and expand recipient services, the Scholarship Program was established as a standalone department in 2024. As the program has evolved, its work increasingly extends beyond application and award administration to recipient support, ongoing communication, progress monitoring, outcome tracking, and alumni engagement.

MSHF currently administers its scholarship programs through a cloud-based grants management platform. While the platform supports core scholarship operations, the program's growth has created a need for stronger capabilities in workflow management, relationship tracking, data quality, reporting and analytics, recipient engagement, and alumni relations. MSHF is therefore seeking an objective assessment of Customer Relationship Management (CRM) solution capable of supporting the full scholarship lifecycle and scaling with future program needs.

Purpose of this Assessment

The purpose of this assessment is to identify and recommend a Customer Relationship Management (CRM) solution and implementation approach that meets the Scholarship Program's current operational needs and supports future growth. The assessment will:

- Document and prioritize business, functional, technical, data, reporting, security, integration, and user-experience requirements across MSHF's Academic, Vocational, and Professional Development and Training scholarship programs.
- Objectively identify, evaluate, and compare viable CRM solutions based on functionality, scalability, vendor capabilities, implementation requirements, risks, and total cost of ownership.
- Recommend a preferred CRM solution and high-level implementation approach that improves operational efficiency, supports data-informed decision-making, and strengthens the experience of applicants, scholarship recipients, alumni, partners, and program staff.

Scope of Work/Services

The Mat-Su Health Foundation Scholarship Program seeks proposals from an experienced contractor to conduct a comprehensive assessment of CRM solutions that can support scholarship administration, recipient engagement, reporting, and long-term program growth. The contractor will evaluate and compare CRM platforms using agreed-upon criteria, including functionality, scalability, reporting and analytics, system integration, user experience, data security, vendor support, implementation requirements, and total cost of ownership.

The selected contractor will work collaboratively with MSHF staff and scholars to understand current workflows, identify gaps and opportunities, and recommend a CRM solution and implementation approach that best align with the Scholarship Program's operational needs and strategic direction. Recommendations should consider current scholarship program processes and operational requirements, with implementation targeted for January 2028. The identification and selection of a CRM solution constitute Phase One of this project. MSHF anticipates issuing a separate RFP for Phase Two to support CRM implementation, configuration, data migration, training, and related implementation services.

Required Activities

The expected activities for this project include but are not limited to:

1. Project Initiation and Discovery
2. Business Process Assessment and Requirement Development
3. CRM Assessment and Solution Evaluation
4. Comparative Analysis and Recommendation
5. Implementation Readiness and Strategic Planning
6. Final Deliverable and Executive Recommendations

Evaluation Questions

Below are key factors to facilitate responses to this RFP.

1. Organizational Assessment & Stakeholder Engagement
 - Describe your approach to understanding our scholarship program's business processes, workflows, and future needs.
 - How will you engage MSHF staff and stakeholders to identify current challenges, opportunities, and system requirement
2. CRM Evaluation Methodology
 - Describe your methodology for identifying, evaluating, and comparing CRM platforms.
 - How will you ensure CRM solutions are assessed consistently and objectively against MSHF's requirements?
 - What evaluation criteria and decision-making tools will you use?
3. Functional and Technical Assessment
 - How will you assess CRM platforms for scholarship administration, recipient engagement, reporting, workflow management, and alumni tracking?
 - How will you evaluate scalability and the ability to support future program growth?
4. Reporting, Analytics, and Data Management

- Describe how you will evaluate reporting, analytics, dashboarding, and data management capabilities.
 - How will you determine whether a CRM can support our current and future reporting needs?
5. Integration, Security, and Data Migration
- How will you assess integration requirements and compatibility with existing systems?
 - How will you evaluate security, privacy, data migration, data ownership, and portability?
6. Total Cost of Ownership Analysis
- Describe how you will evaluate and compare the total cost of ownership for CRM platforms, including licensing, implementation, maintenance, training, and future expansion costs.
 - How will you help MSHF understand the long-term financial implications of each option?
7. Recommendation and Implementation Planning
- Describe how you will develop your final CRM recommendation.
 - What factors will you consider when recommending an implementation approach and timeline leading to a January 2028 launch?
8. Project Management and Timeline
- Provide a detailed work plan and timeline for completing this project.
 - How will you ensure project milestones are met and deliverables are completed on schedule?
 - What risks do you foresee, and how will you mitigate them?
9. Relevant Experience and References
- Describe your experience conducting CRM assessments and system-selection projects for nonprofit, educational, philanthropic, or scholarship-focused organizations.
 - Provide examples of comparable projects completed within budget and on schedule.
10. Knowledge Transfer and Change Management
- How will you prepare MSHF staff to make an informed CRM selection decision?
 - What tools, documentation, or training will you provide to support decision-making and future implementation planning?

Program Service Area

The service area for this project is the Matanuska-Susitna Borough, Alaska. The project may be completed primarily through remote engagement, with opportunities for in-person meetings as mutually agreed upon and needed to support project objectives.

Proposal Requirements

Proposals should include responses to the six sections outlined below. Proposals shall not exceed 10 pages, single-spaced, excluding the budget, resume/CVs of key personnel, references, and sample work product.

1. Approach

Describe your approach to assessing the Scholarship Program's business processes, stakeholder needs, and technology requirements to identify the CRM solution best suited to support current operations and future growth. The proposal should include:

- Methods for stakeholder engagement, workflow assessment, and requirements gathering.
- Methodologies for data collection and analysis, including consideration of equitable access and user experience.
- An approach for evaluating CRM solutions against defined criteria such as functionality, scalability, reporting, integrations, implementation requirements, and cost.
- A transparent process for comparing options and developing a final CRM recommendation.
- Processes and systems to ensure compatibility, data security, confidentiality, and compliance with applicable privacy requirements throughout the project.

2. Qualifications and experience

Identify who will serve as project lead and the roles of any additional project team members. Describe the experiences and qualifications of the individual, team, and/or subcontractors who will engage in this work, including:

- Experience evaluating and selecting CRM platforms based on functionality, scalability, reporting capabilities, integrations, security, and total cost of ownership, including conducting comprehensive needs assessments and requirements gathering to identify organizational needs and align solutions with business objectives.
- Extensive knowledge of or demonstrated experience working with philanthropic, nonprofit, educational, scholarship, or similar organizations.
- Demonstrated experience developing CRM implementation roadmaps, change management strategies, and technology adoption plans.
- Knowledge of Alaska and/or experience working in Alaska and/or the Mat-Su is preferred

3. Challenges and limitations

Briefly describe any anticipated challenges and limitations to completing the assessment and any proposed strategies to address or mitigate them.

4. Workplan

This project is anticipated to begin on or before December 14, 2026, and conclude by May 30, 2027. MSHF recognizes that the final project timeline may vary based on the proposed scope of work, organizational needs, and overall project cost. Respondents are encouraged to propose a realistic timeline for completion, and the final schedule may be negotiated with the selected contractor. Proposals should include a detailed workplan that identifies key activities, milestones, timelines, and deliverables for completing the project.

The workplan should include, at a minimum:

- Review and assessment of the Scholarship Program's current processes, workflows, data management practices, and technology environment.
- Stakeholder engagement to gather input on program needs, challenges, and future growth objectives.

- Evaluation of current and anticipated operational requirements to support program expansion and long-term sustainability.
- Identification and assessment of CRM solutions that align with program needs, functionality requirements, reporting needs, integrations, scalability, and budget considerations.
- Development of a CRM evaluation framework and selection process, including criteria and recommendations.
- Presentation of findings and delivery of a final report identifying the CRM solution best suited to support the Scholarship Program's current operations and anticipated future growth.

Proposals should clearly identify project phases, expect deliverables, and estimate completion dates for each major activity.

5. Budget

The proposed budget should not exceed \$50,000 for services conducted in 6 months and should be commensurate with the scope of work. Include a detailed project budget and justification. Include all direct and indirect costs, as well as the anticipated total number of hours at various hourly rates. For contractors outside the Mat-Su Borough, travel costs specifically related to this project are allowable as direct costs.

6. Project Examples

Describe your experience conducting CRM assessments and system selection projects for nonprofit, educational, philanthropic, or scholarship-focused organizations, including examples of comparable projects successfully completed on schedule and within budget.

RFP Timeline

Applications must be submitted no later than 1 p.m. at Alaska Standard/Daylight Time, October 26, 2026. Please submit your application with the subject line "MSHF RFP Scholarship Program" in PDF form via email to schrfpsubmission@healthymatsu.org.

Applications will be reviewed the week of October 26, 2026, and final candidates will be invited for an interview. We anticipate selecting a contractor by the week of November 16, 2026, with the goal of having a signed contract in place on or after December 7, 2026.

Evaluation Criteria

Proposals will be evaluated based on the following criteria:

Criteria	Weight
Understanding of Project & Methodology	20%
CRM Assessment & Recommendation Approach	20%
Relevant Experience & Qualifications	20%
Stakeholder Engagement & Facilitation	10%
Project Management & Timeline	10%
Implementation Planning & Strategic Fit	10%
Cost Proposal	10%

Questions

If you have questions or would like to discuss this RFP further, please contact Adelina Rodriguez, Scholarship Program Officer, schrfpsubmission@healthymatsu.org. A question and answer session will be hosted on October 7, 2026 at 10:00 am AKST via Zoom. A registration link will be shared on our RFP webpage.