

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

Frequently Asked Questions and Responses for RFP Readiness

Updated October 15, 2026

Schedule and Submission

What is the proposal submission deadline?

The proposal deadline is **October 26, 2026, at 1:00 p.m. Alaska local time (AKDT)**.

Will Q&A responses be published?

Yes. Questions and responses will be compiled and published as an FAQ to ensure all interested parties have equal access to the same information.

Where should proposal submissions be sent?

Please submit your application with the subject line “MSHF RFP Scholarship Program” in PDF form via email to schrfpsubmission@healthymatsu.org.

Eligibility and Participation

Are firms based outside the United States eligible to submit proposals?

Yes. International firms, independent consultants, and organizations based outside the United States may submit proposals, provided they have U.S. Operations. U.S. operations require a physical presence in the U.S. The successful bidder must be a legal entity recognized under U.S. law.

Can a U.S.-registered company use an international or offshore delivery team?

Yes. A U.S.-registered company may utilize a distributed or international team, provided project leadership, stakeholder engagement, confidentiality, security, deliverables, and service levels meet MSHF requirements.

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Are there requirements related to business registration, insurance, licensing, tax documentation, supplier registration, or having a U.S. or Alaska-based partner?

The vendor is a U.S. contracting entity as the contractor i.e., the contractor is a legal entity that exists under U.S. law and can be sued, served, and held accountable in the United States. The contractor must, at a minimum, hold professional liability insurance and cyberliability insurance is preferred, covering privacy breaches, technology failures, and subcontractors. Alaska law governs the contract and Alaska courts are the automatic venue in the event of a dispute. Additional contracting requirements, if any, will be discussed with the selected contractor during the contracting process.

Are teaming arrangements, subcontractors, consortiums, or partner organizations permitted?

Yes. Respondents may propose subcontractors or teaming partners. The proposal should clearly identify each organization's role and responsibilities.

Can a prime contractor rely on the experience of proposed team members or subcontractors?

Yes. Relevant experience may be demonstrated through the lead firm, proposed subcontractors, or key personnel identified in the proposal.

Are anonymized project examples acceptable when client identities are confidential?

Yes. Respondents may provide anonymized project examples when subject to confidentiality restrictions, provided sufficient detail is included to demonstrate relevant experience.

What conflict-of-interest requirements apply? Are referral or intermediary fee arrangements permitted, and if so, what disclosures are required?

MSHF reserves the right to consider and respond to fact-intensive inquiries, such as following up with direct communication with a potential vendor. In general, the internal costs of a bidder are irrelevant unless the arrangement poses a risk of potential conflict of interest detrimental to the MSHF or the fairness of the arrangement to other bidders. The MSHF requires detailed disclosure of all such potential conflicts of interest.

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Experience and References

Is direct scholarship-sector CRM assessment experience required?

No. While experience supporting scholarship, nonprofit, philanthropic, educational, or similar organizations is preferred, proposals will be evaluated based on the relevance and strength of overall CRM assessment, business process analysis, software selection, and implementation planning experience.

Will MSHF consider proposals from newer consulting firms or consultants with limited client references?

Yes. Firms may explain any limitations in prior experience and provide alternative evidence of capability, including work samples, methodologies, qualifications of proposed staff, or relevant internal projects.

Are client references required? If so, how many?

References are encouraged as part of demonstrating relevant experience. No specific number or format is required unless otherwise stated in the RFP.

Can a sample evaluation, methodology, or work product be submitted in place of comparable completed CRM projects?

Yes. Supplemental materials may be included to demonstrate approach, expertise, and capabilities.

Current Technology Environment

What grants management platform is currently used by the Scholarship Program?

Information regarding the current grants management platform and supporting systems will be shared with the selected contractor as part of the discovery process.

Is MSHF currently using other systems in addition to the grants management platform?

The selected contractor will be provided information about the Scholarship Program's current technology environment, workflows, reporting tools, and supporting systems during Phase One.

What integrations should the future CRM support?

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Part of the assessment will be identifying current and future integration needs. Existing systems, integration points, and business requirements will be explored during discovery.

Will technical documentation be available?

Available documentation, including workflows, process documentation, system information, and related materials, will be provided to the selected contractor where available.

Will information about APIs, exports, data structures, and reporting tools be provided?

Yes. Information available to MSHF regarding current systems and data environments will be shared during the engagement.

Data and Program Information

How many users, applicants, scholarship recipients, alumni, and records are currently managed?

Detailed operational and data-volume information will be provided to the selected contractor during Phase One discovery activities.

Will the selected contractor be expected to assess data quality and migration readiness?

Yes. MSHF anticipates that Phase One recommendations will include consideration of data quality, migration readiness, and overall implementation planning.

Are there known data quality, migration, or historical data challenges?

These topics will be explored as part of the assessment and discovery process.

Are there planned changes to scholarship programs, eligibility requirements, or operating models that the future CRM should accommodate?

Any anticipated future business requirements will be discussed during stakeholder discovery and planning activities.

CRM Evaluation and Selection

Has MSHF already identified preferred CRM platforms?

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No CRM platform has been selected. The purpose of Phase One is to assess needs, evaluate appropriate solutions, and provide recommendations.

Should the selected consultant develop the CRM shortlist?

MSHF expects the selected contractor to support the evaluation process and provide recommendations regarding appropriate CRM solutions.

Will the selected contractor facilitate CRM vendor demonstrations, proof-of-concept activities, RFIs, or pricing discussions?

MSHF expects the selected contractor to provide guidance and support throughout the CRM evaluation process. The specific level of vendor engagement should be described in the proposer's recommended approach.

Does MSHF require complete vendor neutrality?

MSHF seeks objective, transparent, and unbiased recommendations. Any real or perceived conflicts of interest should be clearly disclosed within the proposal.

Are firms that develop, own, resell, or implement CRM products eligible to participate?

Yes, provided any conflicts of interest are fully disclosed and the proposed evaluation methodology remains objective and transparent

Implementation Planning and Phase Two

How detailed should the implementation roadmap be?

The implementation roadmap should provide a practical, high-level framework for implementation, including considerations for timelines, resources, change management, integrations, data migration, and implementation readiness.

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Is Phase One expected to include implementation readiness activities?

Yes. MSHF expects recommendations that help prepare the organization for a future implementation effort.

Will implementation effort, timeline, and resource estimates be required?

Yes. Respondents should propose a reasonable approach for estimating implementation considerations as part of the assessment.

Will the Phase One contractor be eligible to compete for Phase Two implementation work?

Yes. Phase Two is anticipated to be procured separately. Participation in Phase One does not automatically disqualify a contractor from future procurement opportunities. Any procurement requirements applicable at that time will be outlined in the future solicitation.

Stakeholder Engagement

How many stakeholders should respondents anticipate engaging?

The selected contractor should anticipate engaging Scholarship Program staff and relevant stakeholders. Specific participant groups and engagement levels will be finalized during project initiation.

Should engagement include scholarship recipients, alumni, partner organizations, tribal partners, or external stakeholders?

MSHF anticipates stakeholder engagement may include both internal and external participants as appropriate to support the assessment process.

What engagement methods are preferred?

Respondents may recommend interviews, workshops, surveys, focus groups, or a combination of engagement methods.

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Remote and In-Person Work

Is remote delivery acceptable?

Yes. The engagement may be completed primarily through remote collaboration.

Will any activities be conducted in person?

MSHF may request mutually agreed-upon in-person meetings or workshops if beneficial to the project. Any travel requirements will be coordinated with the selected contractor.

Is a U.S. presence required?

No. However, contractors must be able to effectively support stakeholder engagement, project management, and contractual requirements.

Budget, Contracting, and Payments

Does the \$50,000 budget cap apply to the entire Phase One engagement?

Yes. The budget cap applies to the complete Phase One scope of work and deliverables.

Are travel expenses included in the \$50,000 cap?

Approved travel expenses, if required, are not included in the \$50,000 cap.

What currency applies to the budget cap?

All proposals should be submitted in U.S. dollars.

How will payment milestones be structured?

Payment terms and milestone schedules will be finalized during contract negotiations with the selected contractor.

Proposal Requirements

Must proposals address the entire scope of work?

Yes. Proposals should address the complete CRM assessment, evaluation, recommendation, and implementation readiness scope outlined in the RFP.

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Can AI-assisted tools be used to support proposal development?

Yes. Respondents are responsible for the accuracy, security, confidentiality, and originality of all submitted materials, regardless of the tools used in their preparation.

Additional Information

Will MSHF provide information regarding staffing levels, workflows, business processes, reporting needs, and system usage?

Yes. Additional operational details necessary to complete the assessment will be provided to the selected contractor as part of the engagement.

Is MSHF seeking a technology recommendation only, or a broader operational review?

MSHF seeks both. The assessment should evaluate current processes, identify opportunities for improvement, assess future needs, and recommend an appropriate CRM solution and implementation approach.

Is there flexibility in the Phase One timeline?

The project timeline identified in the RFP represents MSHF's desired schedule. Any recommended adjustments should be identified and justified within the proposal.