

 <p>LANDER UNIVERSITY OFFICE OF PROCUREMENT SERVICES</p>	<h2>Request for Proposal Amendment 1</h2>	Solicitation Number Date Issued Procurement Officer Phone E-Mail Address	RFP-SP-593-11-05-2026 10/27/2026 Scott Pilgrim (864) 388-8698 spilgrim@lander.edu
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DESCRIPTION: Undergraduate Enrollment Strategy and Operations Discovery

SUBMIT OFFER BY (Opening Date/Time): **11/05/2026 3:00 pm EST** (See "Deadline For Submission Of Offer" provision)

QUESTIONS MUST BE RECEIVED BY: **10/19/2026 12:00 Noon** (See "Questions From Offerors" provision)

NUMBER OF COPIES TO BE SUBMITTED: **One (1) Technical marked "Original", three (3) Technical copies, one (1) Electronic Technical, one (1) Fee/Cost Proposal, one (1) redacted copy of both Technical & Fee/Cost proposal (unless redaction is not necessary).**

Initial here _____ if a redacted copy is NOT necessary.

See Section II. A "DISCLOSURE OF YOUR BID / PROPOSAL and SUBMITTING CONFIDENTIAL DATA, Section II. B "Electronic Copies- Required Media and Format" (See "Submitting Your Offer" provision)

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior. (See "Submitting Your Offer" provision)	
SUBMIT YOUR SEALED OFFER TO EITHER OF THE FOLLOWING ADDRESSES:	
MAILING ADDRESS: Lander University Procurement Services CPO 6023 Greenwood, S.C. 29649	PHYSICAL ADDRESS: 204 W Henrietta Ave Building FO 2, Room 212 Greenwood, S.C. 29649
CONFERENCE TYPE: N/A DATE & TIME: N/A As appropriate, see "Conferences - Pre-Bid/Proposal" & "Site Visit" provisions	LOCATION: N/A
AWARD & AMENDMENTS	Award will be posted at the Physical Address stated above on 11/16/2026 . The award, this solicitation, and any amendments will be posted at the following web address: http://www.lander.edu/solicitations
You must submit a signed copy of this form with Your Offer. By signing, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of one hundred eighty (180) calendar days after the Opening Date. (See "Signing Your Offer" provision.)	
NAME OF OFFEROR (full legal name of business submitting the offer)	Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror. The entity named as the offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.
AUTHORIZED SIGNATURE (Person must be authorized to submit binding offer to contract on behalf of Offeror.)	DATE SIGNED
TITLE (business title of person signing above)	STATE VENDOR NO. (Register to Obtain S.C. Vendor No. at www.procurement.sc.gov)
PRINTED NAME (printed name of person signing above)	STATE OF INCORPORATION (If you are a corporation, identify the state of incorporation.)
OFFEROR'S TYPE OF ENTITY: (Check one) (See "Signing Your Offer" provision.) ☐ Sole Proprietorship ☐ Partnership ☐ Other _____ ☐ Corporate entity (not tax-exempt) ☐ Corporation (tax-exempt) ☐ Government entity (federal, state, or local)	

PAYMENT ADDRESS (Address to which payments will be sent.) (See "Payment" clause) _____ Payment Address same as Home Office Address _____ Payment Address same as Notice Address (check only one)	ORDER ADDRESS (Address to which purchase orders will be sent) (See "Purchase Orders and "Contract Documents" clauses) _____ Order Address same as Home Office Address _____ Order Address same as Notice Address (check only one)						
ACKNOWLEDGMENT OF AMENDMENTS Offerors acknowledges receipt of amendments by indicating amendment number and its date of issue. (See "Amendments to Solicitation" Provision)							
Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date	Amendment No.	Amendment Issue Date
DISCOUNT FOR PROMPT PAYMENT (See "Discount for Prompt Payment" clause)		10 Calendar Days (%)	20 Calendar Days (%)	30 Calendar Days (%)	_____ Calendar Days (%)		
PREFERENCES - A NOTICE TO VENDORS (SEP. 2009): DO NOT APPLY PER SC CONSOLIDATED PROCUREMENT CODE [11-35-1524(E)(5)]							

(Return Page Two with your Offer)

AMENDMENTS TO SOLICITATION (Modified): (a) The Solicitation may be amended at any time prior to opening. All actual and prospective Offerors should monitor the following web site for the issuance of Amendments: www.lander.edu/solicitations (b) Offerors shall acknowledge receipt of any amendment to this solicitation (1) by signing and returning the amendment, (2) by identifying the amendment number and date in the space provided for this purpose on Page Two, (3) by letter, or (4) by submitting a bid that indicates in some way that the bidder received the amendment. (c) If this solicitation is amended, then all terms and conditions which are not modified remain unchanged.

AMENDMENTS TO SOLICIATION (JUN 2017)

The solicitation is amended as provided herein. Information or changes resulting from questions will be shown in a question-and-answer format. All questions received have been reprinted below. The “Response” should be read without reference to the questions. The questions are included solely to provide a cross-reference to the potential offeror that submitted the question. Questions do not form a part of the contract; the “Response” does. Any restatement of part or all of an existing provision of the solicitation in an answer does not modify the original provision except as follows: Underlined text is added to the original provision. Stricken text is deleted. [02-2A097-1]

QUESTIONS AND RESPONSES:

1. **Question:** Section III.2.F describes the technology platform as an optional component. Will a proposal that delivers the full consulting and services scope in Sections III.2.A through III.2.E, without a software platform, be considered fully responsive and scored without penalty under the Technical Response (40 points) and Implementation/Integration (25 points) factors?
Response: Yes. Section III.2.F is an optional technology component. Offerors may propose the services described in Sections III.2.A through III.2.E without proposing a technology platform. An Offeror will not be penalized solely for not proposing the optional technology component.
2. **Question:** Section IV.2.A (items 1 through 8, including call center operations, number of dedicated call center representatives, guaranteed uptime, concurrent users, mobile optimization, and minimum technical requirements), the CITO/ITS Data Governance and Security checklist (VPAT, SaaS hosting, TouchNet, and Ellucian Banner integration), and the evaluation factors referencing an annual maintenance contract and ERP integration appear written for a hosted software platform. Please confirm whether these items apply only to offerors proposing a Section III.2.F platform, and how a services-only offeror should address them (for example, marking them Not Applicable).
Response: Requirements that are specific to the optional technology component apply only to Offerors proposing that component. Offerors proposing only the services described in Sections III.2.A through III.2.E may identify requirements applicable solely to the optional technology component as “Not Applicable.” All other applicable solicitation requirements remain in effect.
3. **Question:** Separately, the CITO checklist in the RFP begins at its Page 2. Please provide Page 1 if it contains additional requirements.
Response: No change. Attachment G begins on page 55 of the solicitation package. No additional page exists.
4. **Question:** For a services-only engagement in which the contractor would access Lander's existing systems (for example, the CRM) rather than host or store Lander data, how should the Service Provider Security Assessment Questionnaire (Attachment G) be scoped and completed?
Response: No Change. Offerors should complete Attachment G based on the systems, personnel, and processes they will use while performing the contract and any access they will have to University information, regardless of whether information is hosted within University systems or contractor systems.
5. **Question:** Section VII.B sets an initial contract term of one year from the effective date and does not list renewal periods, but Section VIII scores cost on the lowest total five-year cost. Please confirm the full potential contract period, including any renewals, the anticipated contract start date, and the period over which the cost proposal should be built.
Response: The resulting contract will have an initial term of one year. Section VIII. B language has been changed from “Financial Cost Proposal points will be awarded based upon the lowest evaluated total ~~five-year~~ cost proposal” to read “Financial Cost Proposal points will be awarded based upon the lowest evaluated total one-year cost proposal.”
6. **Question:** Has Lander established a budget range or not-to-exceed amount for this engagement?
Response: No

7. **Question:** Section IV.2 asks for recommendations on support during implementation and post-implementation. Is ongoing post-engagement support expected to be in scope and priced, or are written recommendations for post-implementation support sufficient?
Response: No change. Offerors should include any recommended support approach and associated pricing if applicable.
8. **Question:** Section III.2.C calls for individual coaching "as requested by the Institution" and recurring leadership meetings, and Section III.2.E calls for recurring strategy meetings before and after campaign launches, with no stated volumes. To price these services on a fixed basis, please provide the number of enrollment staff in scope (counselors/recruiters and leadership), the expected frequency of leadership and campaign strategy meetings, and any expected annual volume of individual coaching sessions.
Response: No change. The solicitation intentionally does not prescribe specific quantities. Offerors should propose a reasonable approach based upon their experience and the scope described in Section III.
9. **Question:** Because Lander will not reimburse travel, what are Lander's expectations for on-site versus remote delivery (for example, discovery interviews or training), and how many on-site visits or days are anticipated?
Response: No change. The University will not reimburse travel or related expenses. Offerors should include all travel costs in their pricing if onsite services are proposed. Remote delivery is acceptable unless the Offeror proposes otherwise.
10. **Question:** Section III.2.F names Slate CRM, and the CITO checklist references Ellucian Banner. Please confirm the CRM Lander uses for undergraduate recruitment communications, the student information system, and the level of access the contractor will receive for the CRM assessment in Section III.2.D (for example, read-only or configuration access, including deliverability and domain authentication settings).
Response: No change. Slate is the University's CRM environment for undergraduate recruitment, and Ellucian Banner is the University's student information system. The solicitation does not guarantee any particular level of system access. Access necessary to perform the contracted scope will be determined during contract implementation and will be subject to University policies and security requirements.
11. **Question:** Please also confirm whether the "CRM configuration improvement plan" deliverable is a written plan for Lander staff to carry out, or whether Lander expects the contractor to build the recommended configuration changes.
Response: No change. Section III.2.D requires assessment, audit, recommendations, optimization recommendations, segmentation recommendations, and a CRM configuration improvement plan. Offerors may also propose implementation assistance if desired.
12. **Question:** Will Lander make current-state documentation, enrollment funnel data, or CRM configuration details available to offerors before submission?
Response: No change. No additional documentation beyond what is contained in the solicitation will be provided prior to proposal submission.
13. **Question:** Is a consultant or vendor currently supporting Lander's enrollment operations in any of the Section III.2 areas?
Response: No change. The University does not intend to provide details regarding existing contractual relationships as part of this solicitation.
14. **Question:** Section III.2.A covers the student journey "from inquiry through enrollment and academic advising," and Section III.1 refers to on-campus undergraduate recruitment and enrollment. Please confirm whether the scope includes transfer students in addition to first-year students, and whether journey mapping and communication strategy are expected to extend beyond academic advising (for example, into first-year retention communications).
Response: No change. The primary focus of this solicitation is undergraduate recruitment and enrollment, including first-year and transfer students. The required student journey extends from inquiry through enrollment and academic advising as described in Section III.2.A. Offerors may propose additional strategies related to student retention if they believe those strategies would provide value to the University understanding the main objective above is satisfied first.
15. **Question:** Section III.2.C identifies the training audience as enrollment counselors, recruitment staff, and enrollment leadership. Please confirm whether financial aid staff, or staff in other offices, are included in the training and coaching program and, if so, approximately how many.

Response: No change. The required audience includes enrollment counselors, recruitment staff, and enrollment leadership. Additional participation by other University personnel may be determined after award.

16. **Question:** Section IV.3.B asks for three state agency client references from the past two years, similar in size and scope. Please confirm whether public colleges and universities, including out-of-state public institutions, qualify as state agency references, and whether references from private colleges and universities are acceptable for any of the three.

Response: No change. Public colleges and universities and other public entities may be submitted if they are governmental entities and the engagement is similar in size and scope to the services requested.

17. **Question:** Section VII.B (Performance Bond Required, ITMO) requires a performance bond or equivalent security in the face amount of the contract within 10 days of execution, tied in part to a final implementation plan. Please confirm whether this requirement applies to a consulting and training services award or only where a technology solution is proposed. If it applies, please confirm whether the face amount is based on the Year 1 value or the total five-year value.

Response: The clause PERFORMANCE BOND REQUIRED – ITMO applies only if the Offeror proposes a software solution as part of its proposal. If no software solution is proposed, a performance bond will not be required.

18. **Question:** Can the University provide an overview of its current undergraduate enrollment technology ecosystem, including Slate CRM and any supplemental recruitment, student engagement, behavioral intelligence, marketing automation, or analytics platforms currently in use? Are there existing vendor relationships or technology investments that the selected partner would be expected to maintain, evaluate, or integrate with?

Response: No change. Lander University currently utilizes Slate CRM as its primary undergraduate recruitment and admissions platform. Offerors are encouraged to explain their approach for evaluating existing technology environments, identifying gaps and opportunities, and recommending appropriate recruitment, engagement, marketing automation, behavioral intelligence, and analytics solutions as part of the discovery engagement.

19. **Question:** Does the University anticipate that the selected partner will provide access to an existing digital learning platform or library of training modules, or would customized training materials, virtual instruction, recorded sessions, practical exercises, and coaching developed specifically for Lander satisfy this requirement?

Response: Either approach is acceptable. Offerors may provide access to an existing learning platform or deliver customized training materials and resources developed specifically for Lander University, provided the requirements of Section III.C are satisfied.

20. **Question:** The RFP encompasses strategic assessment, student journey mapping, CRM optimization, recruitment marketing, staff development, coaching, and ongoing enrollment performance management. Does the University envision these activities being delivered through a phased engagement, with initial discovery informing subsequent priorities, or does it expect all services to be implemented concurrently within the initial contract term?

Response: No change. The University anticipates that Offerors may recommend an implementation approach based upon their professional experience. Offerors should describe the methodology, sequencing, and timing they believe will best achieve the objectives identified in the solicitation.

21. **Question:** Given the University's recent undergraduate enrollment growth, can Lander elaborate on the primary operational challenges or opportunities prompting this solicitation? Are there particular outcomes, such as improved conversion rates, staff capacity, communication effectiveness, or enrollment forecasting, that the University considers highest priority?

Response: No change. The University's objectives are described within the solicitation.

22. **Question:** Please clarify the expected level of execution for the required deliverables. Where the RFP calls for assessments, strategies, frameworks, recommendations, specifications, and improvement plans, is the selected vendor expected to stop at those deliverables, or should respondents also include hands-on implementation—for example, developing communication content, configuring CRM workflows, implementing campaign changes, and building/deploying reporting dashboards?

Response: No change. The required deliverables are identified in Section III. Offerors should provide the assessment, strategy, recommendations, plans, training, coaching, and other deliverables identified in the solicitation. Offerors may propose hands-on implementation services where they believe those services would provide value to the University, but such implementation should be clearly identified in the proposal.

23. **Question:** Please clarify the expected level of CRM support. Is the selected vendor expected primarily to assess and optimize Lander's existing Slate CRM environment and provide configuration recommendations, or should the scope include hands-on Slate configuration and development, including workflows, campaigns, integrations, and related technical implementation?
Response: No change. The required deliverables are identified in Section III. The University expects the selected Offeror to assess and optimize its existing Slate CRM environment and provide actionable configuration recommendations. Offerors are encouraged to include hands-on configuration, development, workflow, campaign, integration, or other implementation services where they believe such services would improve the University's CRM environment and support the objectives of the solicitation.
24. **Question:** Please clarify the expected level of campaign execution under the Recruitment Strategy and Enrollment Marketing Support scope. Is the selected vendor expected to provide strategy, monitoring, and ongoing advisory support only, or also to execute recruitment campaigns and communications on Lander's behalf?
Response: No change. The required deliverables are identified in Section III. The University expects Offerors to provide the recruitment strategy, monitoring, and ongoing support described in the solicitation. Offerors are encouraged to include campaign execution, communication development, or other implementation support where they believe those services would improve recruitment outcomes and provide value to the University.
25. **Question:** If a respondent proposes the optional Enrollment Intelligence Platform, should all associated implementation, integration, hosting, licensing, maintenance, and support costs be included in the evaluated five-year cost? Please also clarify any required hosting environment, integration architecture, or institutional technology standards respondents should assume for pricing.
Response: No change. Offerors proposing the optional technology component should include all costs associated with implementation, integration, licensing, hosting, maintenance, support, and any other costs necessary to provide the proposed solution for the one-year contract term. Costs associated with the optional technology component should be separately identified from the cost of the required services. Offerors should base their proposal on the requirements identified in the solicitation.
26. **Question:** For the optional Enrollment Intelligence Platform, does Lander expect the selected vendor to configure and deploy a production-ready platform during the initial contract term, or may respondents propose a phased implementation beginning with discovery, architecture, integration planning, and reporting capabilities?
Response: Offerors may propose an implementation approach they believe best satisfies the objectives of the solicitation.
27. **Question:** Will Lander accept an offer from a vendor whose South Carolina vendor registration is submitted but not yet assigned a number at the 11/05/2026 deadline?
Response: Yes. Documentation of submission of registration request must be included with submission.
28. **Question:** Must the \$5M/\$10M information security and professional liability coverage be in place at proposal submission, at award, or before work commences?
Response: Offerors are not required to have the specified insurance coverage in place at the time of proposal submission. The successful Offeror must provide evidence of all required coverage prior to commencement of contract performance.
29. **Question:** Please confirm the number of technical copies, electronic media and redacted copies required, since the cover page wording reads 'One (1) three (3) Technical copies'.
Response: No change.
30. **Question:** Please confirm whether the \$5 million per occurrence/\$10 million aggregate Information Security and Privacy insurance requirement applies to all awarded service configurations, including a consulting-focused engagement in which the Contractor does not host Lander University government information or provide the optional technology platform.
Response: No change. The Information Security and Privacy insurance requirements apply to the resulting contract regardless of whether the Offeror proposes the optional technology component. The selected contractor may have access to University systems and information in performing the required services.
31. **Question:** Would Lander consider proposals from firms that are qualified to provide a defined portion of the overall scope, rather than all services outlined in the RFP? For example, could a firm submit a proposal specifically for the enrollment communications, student journey, recruitment strategy and CRM optimization components, or is Lander seeking a single proposal that addresses the full required scope?

Response: No change. The University is seeking a single Offeror to address the full required scope of services identified in the solicitation. Offerors may utilize qualified subcontractors as permitted by the solicitation to provide specific components of the proposed solution.

32. **Question:** Section III.C requires online learning modules, video learning content, and skills assessments. May the offeror deliver these using its own platform, or must they be hosted within a University system?

Response: No change. Offerors may deliver the required online learning modules, video learning content, and skills assessments through their own platform or through University-supported systems, provided the proposed approach satisfies the requirements of Section III.C and all applicable University security and accessibility requirements.

33. **Question:** Will the University accept electronic submission in place of the sealed paper copies if the offeror cannot deliver physical copies by the opening date?

Response: No change.

34. **Question:** Does the University have a target start date and expected duration for the discovery work, and are there any enrollment cycle milestones the work must align with?

Response: No change. The University anticipates beginning work as soon as practicable following award and contract execution. Offerors should propose a discovery and implementation schedule that they believe best supports the University's recruitment and enrollment objectives and appropriately considers relevant enrollment-cycle milestones.