



**SCHOLARMATCH, INC.
REQUEST FOR PROPOSAL**

CRM Evaluation and Selection Consultant

**Date Issued:
September 18, 2025**

**Deadline:
October 3, 2025**

OVERVIEW

ScholarMatch's mission is to support first-generation college students from low-income backgrounds to earn a bachelor's degree within five years. We provide virtual individualized advising, targeted financial support, and career mentoring all the way to graduation. Since 2010, ScholarMatch has been dedicated to supporting first-generation college students from low-income backgrounds as they apply to and persist through college. Our work is relationship-based, equity-minded, and student-centered.

We serve 600-1,000 students annually. The majority of our students join us from the San Francisco Bay Area, and we also serve student cohorts in Los Angeles and nationwide, through scholarship and advising partnerships. The core of our program model is working with dedicated volunteers who serve as college coaches to high school students in our college access program. Annual volunteer numbers range from 300-500, and we wish to scale this higher as we work to increase our reach and capacity to serve students in the coming years. Due to our growing numbers, we are in need of a dedicated CRM platform to be able to effectively scale our programs and services.

With this RFP, ScholarMatch solicits proposals from consultants who have specialized experience in identifying and evaluating Customer Relationship Management (CRM) software technology to meet the needs of the organization, including:

- Volunteer recruitment, onboarding, communication, and data management
- Student recruitment, onboarding, communication, and data management
- Program data collection and goal tracking
- Integration with current tech stack and/or support with data migration

Please note: the budget for this project is not to exceed \$20,000.

Following the evaluation of responses to this RFP, ScholarMatch may select one or more consultant agencies to provide its desired services.

In issuing this RFP, ScholarMatch makes no commitment to establish a work contract with any consultant(s) responding to this RFP, either within the dates specified in the RFP or at any other date(s). ScholarMatch will not reimburse consultants for any expenses or pay for any implied services associated with responses to this RFP – consultants electing to respond to this RFP must do so entirely at their own expense. ScholarMatch agrees to maintain all consultant proposal materials as private and confidential and not display or disseminate them to any individuals other than those evaluating their contents for purposes of this RFP. All proposals and collateral materials submitted in response to this RFP become the property of ScholarMatch and will not be returned to consultants.

RFP TIMELINE

September 15, 2025	Formal Release of the RFP
October 3, 2025	Proposals due by 5:00 p.m. PT to data.rfp@scholarmatch.org
October 8, 2025	ScholarMatch invites selected candidates for interviews
October 15, 2025	Notification of decision
October 27, 2025	Desired start date for consultant
December 19, 2025	Desired completion for scope of work

ScholarMatch reserves the right to adjust any of these dates as necessary to meet its needs. In the event that any of the dates are adjusted, ScholarMatch will send information about the date changes to all consultants to whom this RFP was originally distributed as well as any other consultants that have made their interests known to ScholarMatch.

SCOPE OF WORK

We are looking for an affordable, sustainable, largely out-of-the box CRM solution to manage our student and volunteer data and operational needs. Within the project budget of \$20,000, the professional services we seek include, but are not limited, to:

- Review needs assessment data collected from various ScholarMatch constituents (staff, volunteers, and students), including quantitative and qualitative survey responses and focus group transcripts, and confirm key priorities for CRM platform identification
- Research potential platforms to meet ScholarMatch priorities, identifying 5 platforms that meet minimum requirements for next steps
- Pre-screen platforms for compatibility and pricing
- Select 2-3 platform finalists based on ScholarMatch priorities
- Schedule demo sessions of finalist platforms for ScholarMatch team
- Support team with final selection of platform
- Assess CRM capabilities across core functional areas, including:
 - **Student & Volunteer Management:** Track onboarding, milestones, advising interactions, and engagement.
 - **Communications:** Support bulk and personalized communication with students, coaches, and other stakeholders.
 - **Program Operations:** Monitor advising sessions, program completion metrics, and volunteer participation.
 - **Knowledge Management:** Provide centralized access to resources and training materials.
 - **Donor/Development Alignment:** Ensure compatibility or future integration with existing fundraising platforms (e.g., Bloomerang, Qgiv).

Additional expectations:

- Attend and facilitate biweekly project meetings via Zoom
- Post detailed weekly project updates on Basecamp
- Final deliverables must include a scoring matrix, a narrative report, and a recommended roadmap for next steps.

PROPOSAL REQUIREMENTS

Please note that electronic proposals must be submitted in a pdf format. Proposals are expected to be responsive to all the questions and considerations raised throughout the RFP. An agency's failure to provide sufficient information on, or conformity with, any item within this RFP may be sufficient cause for ScholarMatch to reject any further consideration of that agency's proposal.

Proposal must include the following:

- Name and full contact information of a single individual for the purpose of communications related to receiving and evaluating your agency's response to this RFP.
- Agency description, including:
 - A brief history of the consultant's organization
 - Current agency descriptive information
 - Full disclosure of agency ownership details
 - A list of the program research and design consultant's five largest (by work volume) current clients
 - Names, addresses, telephone numbers, and email addresses of at least two former clients who may be contacted for references
 - Names of ALL other current or recent clients engaged in programs similar to those of ScholarMatch
- The specific individual(s) who will act in the capacity of Account Executive, lead and support staff for the ScholarMatch contract. For the involved individual(s), the proposal must include:
 - A detailed biography or resume
 - A job description for the individual(s) in relation to this contract
- Complete explanation of the policies, processes, tools, resources, procedures, schedules, reports, etc. that will be used to deliver the desired goods and services.
- Explanation of the comprehensive process for proposing and controlling changes to the proposed work processes, products and service requirements, and their associated time and budget constraints.
- Explanation of the management processes your agency regularly uses to ensure that the products and services you provide are timely, correct, consistent, complete, and high in quality. Please explain any policies you have related to warranties of your work, and how those policies are implemented and enforced. Explain the avenues of recourse ScholarMatch will have in the event that it is not satisfied with the products and services rendered as a result of this contract.
- Pricing
 - The proposed pricing of products and services offered by the program research and design consultant agency must reveal and encompass all anticipated expenses.

- Samples of previous work
 - As an attachment to the proposal, please submit one or two case-history examples of materials and services prepared for current or recent clients, similar in nature to what you are proposing for ScholarMatch.
 - If possible, please prepare or modify these attachments to protect their confidentiality and hide the identity of your client(s). These materials will be kept confidential and will not be returned.
- Your proposal must affirm ALL the following statements. In doing so, please provide any required information. You must explicitly reveal and explain any exceptions to or deviations from these statements.
 - Your agency is properly registered and/or bonded in all states required in order to provide your services and/or sell your products.
 - Neither your agency, or its officers, directors or owners, nor any current client of your agency has any state, federal, internal revenue, postal, or federal trade commission criminal enforcement actions pending against it, nor have any of these organizations or individuals had such an action pending or current in the past 36 months to the best of the knowledge of any officer, director or owner of your agency.
 - Your agency or your principals and owners have the following affiliates which are partially or wholly owned by your agency or your principals and owners or with which your agency deals, other than completely “at arms length.” (List_____).
 - Of the preceding list of affiliates the following are proposed as subcontractors under your agency’s proposal to ScholarMatch (List_____).
 - Before entering into any contract with ScholarMatch, your agency understand that it will be required to agree not to enter into any agreements or understandings of any type or description with any current consultants or subcontractors to ScholarMatch which would provide commissions, finders fees, discounts, or any form of compensation or benefit to your agency or to any third party (including officers, directors or staff of ScholarMatch) other than directly to ScholarMatch except as specifically approved in writing by ScholarMatch.
 - Your agency has all of the required commercial general liability insurances including professional liability, workers’ compensation and personal injury and advertising injury (provide current certificate if awarded contract).



SUBMISSION INSTRUCTIONS

Please email proposals to data.rfp@scholarmatch.org
by October 3, 2025 at 5:00 p.m. (Pacific Time).

INQUIRIES

All suggestions and inquiries pertaining to this RFP should be addressed to:
Francisco Prado
Associate Director of Information Systems
Email Address: data.rfp@scholarmatch.org