

**Mississippi State University
Request for Proposals (RFP) 26-10
Consulting/Professional Services for preparing for a SaaS ERP
(Ellucian's Banner)**

ISSUE DATE: September 18, 2025

ISSUING AGENCY: Office of Procurement and Contracts

Mississippi State University
610 McArthur Hall
245 Barr Avenue
Mississippi State, MS 39762

Sealed Proposals, subject to the conditions made a part hereof, will be received **October 14, 2025, at 2:00 PM in the MSU Office of Procurement and Contracts, same address above**, for furnishing services and potentially, optional services as described herein.

IMPORTANT NOTE: Indicate firm name, and RFP number on the front of each sealed proposal envelope or package.

All inquiries concerning this RFP should be directed at:

Jennifer Mayfield
Office of Procurement and Contracts, (Same address above)
jmayfield@procurement.msstate.edu
662-325-2550

Any addendum associated with this RFP will be posted at <http://www.procurement.msstate.edu/procurement/bids/index.php> located under RFP 26-10. It is the respondent's responsibility to assure that all addenda have been reviewed and if applicable, signed and returned.

1. UNIVERSITY OVERVIEW

Mississippi State University (MSU) is a comprehensive land grant university of 23,500+ students and approximately 5,000 faculty and staff. The main campus is located adjacent to the community of Starkville in northeast Mississippi, with a remote campus located in Meridian with an enrollment of around seven hundred students. Additionally, the university operates several remote agricultural experiment stations and has an Extension office located in each of the eighty-two Mississippi counties.

Additional information about MSU can be found on our website www.msstate.edu.

2. INVITATION TO SUBMIT PROPOSAL ON RFP

Mississippi State University (MSU) seeks a qualified and experienced partner to provide professional consultancy services focused on improving the use and adoption of baseline Ellucian Banner platform, with particular emphasis on transitioning from the current heavily customized Ellucian Banner on-premises system to a modern ERP SaaS solution best aligned with the University's needs.

The selected firm will collaborate with MSU stakeholders to provide guidance and implementation support to ensure a successful migration within defined scope, timeline, and budget. MSU intends for this consulting engagement to be structured on a functional area basis, with services paid as utilized, allowing flexibility to focus on priority needs. The purpose of this RFP is to establish a long-term relationship with consulting vendor, including consistent rates for service delivered over the duration of the engagement.

MSU's strategic objectives include optimizing current business processes, reducing unnecessary customizations, returning to baseline functionality where possible, aligning systems and processes with MSU's operational environment and long-term institutional goals.

MSU reserves the right to award either a single contract, or multiple contracts based on this RFP.

3. SCOPE OF SERVICES REQUIRED

The University has identified key opportunities to improve operational efficiency and effectiveness through business process rationalization and redesign across multiple functional areas. With more than 30 years of accumulated code modifications and customizations that cannot be directly migrated to a modern SaaS platform, MSU seeks a qualified consulting partner to guide and support a comprehensive review, redesign, and optimization of existing business processes ensuring alignment with best practices and industry standards.

The scope of services includes, but is not limited to, the following:

- Conduct discovery and assessment sessions with functional and technical stakeholders for focused functional areas by reviewing existing setups and identifying gaps or issues in the current system.
- Facilitate a comprehensive review of existing customizations, modifications, and integrations currently in use.
- Evaluate whether each customization can be:
 - Eliminated (no longer needed)
 - Replaced with delivered baseline ERP functionality
 - Migrated to a supported SaaS-safe extension framework (e.g., APIs, workflow tools, low-code platforms, or vendor-provided extension mechanisms)
- Document existing processes, pain points, and dependencies on legacy customizations.
- Benchmark against peer institutions and SaaS best practices.
- Identify optimal processes to streamline and automate functions for a SaaS platform.
- Develop and recommend streamlined processes for future adoption.
- Provide a prioritized roadmap for process redesign and SaaS readiness.
- Ensure recommendations comply with vendor guidelines for SaaS extensibility and upgrades.
- Facilitate configuration and testing of redesigned processes and changes
- Assist in developing documentation, communication, training, and adoption strategies to support end users.

VENDOR RESPONSE REQUIREMENTS

Vendors are requested to respond in detail to the following:

- Describe your approach to partnering with MSU throughout the lifecycle. How will your team engage with MSU resources both onsite and remotely to drive tasks, decision-making, and deliverables?
- Explain how you will work with MSU to identify, establish, and implement best practices available within the Banner software across different departments and functional areas.
- Identify key differentiators in your implementation approach that contribute to successful delivery to meet MSU's needs.
- How do you help institutions maximize use of Banner's delivered baseline functionality to replace custom processes? Provide examples of common customizations you have successfully eliminated in preparation for SaaS migration.
- What experience do you have helping institutions phase out customizations while adopting SaaS-native functionality? How do you help institutions prioritize which

customizations to eliminate, replace with baseline functionality, or convert to SaaS-safe extensions?

- Describe your approach to collaborating with MSU departments to evaluate existing third-party applications currently integrated with Banner. How will you assist in determining which can be replaced by delivered Banner SaaS functionality, should MSU move in that direction or require continued integration?
- Outline your approach to working with third-party vendors involved in integrations with a SaaS solution. How will you coordinate efforts to ensure seamless data flow and minimize disruption?
- How do your advisory services support institutions in preparing their on-premises Banner environment for eventual SaaS migration, including customization, rationalization, and process standardization?
- Describe your methodology for tracking and managing MSU's business requirements. How will you ensure all requirements are addressed and validated?

4. INQUIRIES ABOUT RFP

Prospective respondents may make written inquiries concerning this request for proposal to obtain clarification of requirements. **Questions should be submitted either via a Word document or plainly typed in the email itself.** Responses to these inquiries may be made by addendum to the Request for Proposal (RFP). Please send your inquiries to Jennifer Mayfield via electronic mail at jmayfield@procurement.msstate.edu.

All inquiries should be marked "URGENT INQUIRY. MSU RFP 26-10"

5. ADMINISTRATIVE INFORMATION

a) Issuing Office

This RFP is issued by the following office:

Office of Procurement and Contracts
Mississippi State University
245 Barr Avenue, 610 McArthur Hall
Mississippi State, MS 39762

b) Schedule of Critical Dates

The following dates are for planning purposes only unless otherwise stated in this RFP progress towards their completion is at the sole discretion of the university.

RFP Posted	September 18, 2025
Questions from Vendors Due	September 26, 2025

MSU Q&A Response Due	October 3, 2025
Proposal Submission Deadline – 2:00 p.m.	October 14, 2025
Award Date (Estimated)	November 1, 2025
Contract Effective Date (Estimated)	November 1, 2025

6. PROPOSAL CONTENTS

This is a two-step RFP process. The technical proposals and the cost proposals are to be submitted in separate sealed envelopes. Indicate firm name, RFP# and word “Technical Proposal” on the front of the sealed technical proposal envelope or package. Indicate the firm name, RFP# and the word “Cost Proposal” on the front of the sealed proposal envelope or package.

At a minimum, the following items should be included in the contents of the Technical Proposal:

- Cover letter, indicating the scope of the proposal. The letter should include an overview of the services being offered. The letter should include a statement of exceptions to any of the terms and conditions outlined in this RFP. (Cover letter should be no more than three pages in length.)
- Corporate Structure and Credentials
 - Firms with demonstrated experience in higher education enterprise systems, especially SaaS transitions for Ellucian Banner
 - Firms with demonstrated experience in process redesign and optimization
 - Experience with stakeholder engagement across diverse functional areas
 - Number of years of experience
 - Staffing levels and support proposed
 - Examples of similar previous work.
 - References from a minimum of three higher education institutions at the R1/Research Highest level who have an enrollment exceeding 20,000 that will be able to speak to the provider’s success at implementing similar services
- Operations and Ability to Perform
 - Provide operation plan. This should include, but not be limited to, acknowledgement and agreement with all requirements as well as explanations, where applicable, of the intended plan to achieve the requirements.
 - Describe how services will be provided to MSU.

At a minimum, the following items should be included in the contents of the Cost Proposal:

Offerors must provide detailed pricing for their proposals, making certain to itemize/detail the costs for each proposed product and/or service. While Mississippi State University may elect to purchase all products and/or services offered by the Offeror, we reserve the right to purchase only a portion of the products and/or services offered.

All prices and rates should be guaranteed firm for the first year. Please indicate pricing and/or discount percentage commitments for subsequent years (i.e., specific prices/discounts for years two and three; percentage increase maximums, or other defined methods). Mississippi State University reserves the right to exercise the option to extend or close any awarded contract at the expiration of year one.

7. DISCUSSIONS/EVALUATION CRITERIA/AWARD PROCESS

MSU reserves the right to conduct discussions with any or all respondents, or to make an award of a contract without such discussions based only on evaluation of the written proposals. MSU reserves the right to contact and interview anyone connected with any past or present projects with which the respondent has been associated. MSU likewise reserves the right to designate a review committee to evaluate the proposals according to the criteria set forth under this section. MSU may make a written determination showing the basis upon which the award was made, and such determination shall be included in the procurement file.

MSU reserves the right to award this contract in whole or in part depending on what is in the best interest of MSU with MSU being the sole judge thereof.

The evaluation factors set forth in this section are described as follows:

- The Vendor's ability to deliver services meeting the overall objective and functions described in the RFP
- Competitive fees
- Availability and access to functional and technical support
- Vendor's experience with similar systems and services
- Compliance with applicable State and Federal laws and regulations
- The committee may invite finalists for interviews and/or presentations

Failure to attend a requested interview presentation before the committee may result in a proposal not being considered.

Upon award of contract(s), successful respondent(s) will be asked to provide a transition plan and timeline and obtain MSU's input and concurrence before moving forward.

Proposals will be scored based on the following weights (100 points total):

- Corporate Structure/Years of Experience/References – 10 pts
- Operation Plan/Ease of Use/Services Offered – 60 pts
- Fees – 30 pts.

8. PROPOSAL SUBMISSION

Proposals shall be submitted in two packages (envelopes or boxes) as set forth in Section 7. Please make sure that the RFP number is clearly visible on the outside of the package.

Technical Proposal – One (1) original and one (1) electronic copy (of the complete technical proposal in one pdf file on a flash drive) of parts 7(b)(i) (Cover Letter), 7(b)(ii) (Corporate Structure and Credentials), and 7(b)(iii) (Operations and Ability to Perform) should be sealed in a package with “Technical Proposal” in the lower left hand corner. Each submitted package should be a complete copy.

Cost Proposal – One (1) original and one (1) electronic copy (of the complete cost proposal in one pdf file on a flash drive). Should be sealed in a package with “Cost Proposal” in the lower left-hand corner. Each submitted package should be a complete copy.

The proposal package must be received on or before **2:00 p.m. on October 14, 2025**. It is the responsibility of the respondent to ensure that the proposal package arrives in the Procurement and Contracts office on time. The proposal package should be delivered or sent by mail to:

**Office of Procurement and Contracts
Mississippi State University
610 McArthur Hall
245 Barr Avenue
Mississippi State, MS 39762**

Your response must include the signature page included in this RFP (See Appendix A) and contain the signature of an authorized representative of the respondent’s organization. The signature on the “Original” signature page can be electronic.

MSU reserves the right to reject any or all proposals and to waive informalities and minor irregularities in proposals received and to accept any portion of a proposal or all items bid if deemed in the best interest of the University to do so.

Proposals received after the stated due date and time will be returned unopened. Currently RFP submissions via facsimile or other electronic means are not acceptable.

9. PCI COMPLIANCE ISSUES (IF APPLICABLE)

The vendor must provide a PCI compliant processing environment using one of the approved options below. If the vendor is unable to fully adhere to one of these options, the proposal will be removed from consideration.

- **Option 1** – Integrate with MSU’s existing third-party solution (NelNet Business Solutions – Commerce Manager), because all hardware, software and back-end processing have been vetted and credit/debit card payments are automatically posted to Banner.
- **Option 2** – Use alternative third-party solution. Use a different MSU Merchant ID but same bank account.
 - Work with members of MSU’s PCI Council and third-party PCI Compliance consultant to review business needs and proposed solution.
 - Ensure card transactions processed by university personnel are performed using a PCI-validated point to point encrypted (P2PE) solution. The solution must be listed on the PCI council’s website (<https://www.pcisecuritystandards.org>), must not be expired, and devices to be used with the solution must have a PIN transaction security (PTS) expiration date at least 3 years past the date of installation.
 - Obtain the following solution information
 - Attestation of compliance (AoC) from all parties involved in handling or that affects the security of cardholder data.
 - Verify that all devices have a current PTS certification and have an expiration date at least 3 years past the installation date of the solution.
 - Obtain a data flow diagram showing where payment card data will be introduced to the proposed solution and all steps/hops it will take until payment information is delivered to the merchant processing bank. This will determine all of the service providers that must provide an AoC.
 - Require specific reporting requirements and interfaces to support Banner integration and automatic posting of credit/debit card payments to the ERP. The exact file layout will be provided upon request.
- **Option 3** – Use alternative third-party solution. Use vendor’s Merchant ID.
 - Work with members of MSU’s PCI Council and third-party PCI Compliance consultant to review the solution.
 - Ensure card transactions processed by university personnel are performed using a PCI-validated point to point encrypted (P2PE) solution. The solution must be listed on the PCI council’s website (<https://www.pcisecuritystandards.org>), must not be expired, and devices to be used with the solution must have a PIN

transaction security (PTS) expiration date at least 3 years past the date of installation.

- Obtain the following solution information
- Attestation of compliance (AoC) from all parties involved in handling or that affects the security of cardholder data.
- Verify that all devices have a current PTS certification and have an expiration date at least 3 years past the installation date of the solution.
- Obtain a data flow diagram showing where payment card data will be introduced to the proposed solution and all steps/hops it will take until payment information is delivered to the merchant processing bank. This will determine all the service providers that must provide an AoC.
- Payments due to MSU will be remitted on a predetermined basis, net of all applicable fees and merchant discounts. Banner integration is not required.

10. TWO-PHASE, BEST AND FINAL OFFER

If the initial proposals do not provide MSU with a clear and convincing solution, or if MSU feels it is appropriate to offer the potential providers an opportunity to submit revised proposals, MSU reserves the right to use a two-phase approach and/or invite Best and Final Offers (BAFO). Based on the information obtained through the proposal submittals (Phase-One), MSU may choose a specific business model, and potential providers may be asked to submit revised proposals based upon that specific model.

The evaluation committee may develop, for distribution to the top-ranked firms, refined written terms with specific information on what is being requested as a result of information obtained through initial RFP submittal process. Proposers may be asked to reduce cost or provide additional clarification to specific sections of the RFP. Selected proposers are not required to submit a BAFO and may submit a written response notifying the solicitation evaluation committee that their response remains as originally submitted.

11. TERM OF CONTRACT

It is MSU's intention to enter into a three (3) year contract, estimated to begin November 1, 2025.

MSU reserves the right to terminate this agreement with thirty (30) days-notice, by the Director of Procurement and Contracts via certified mail to the address listed on the signature page of this RFP (See Appendix A) if any of the terms of the proposal and/or contract are violated.

In the event the contractor fails to carry out and comply with any of the conditions and agreements to be performed under the specifications, MSU will notify the contractor, in writing, of such failure or default. In the event the necessary corrective action has not been

completed within a ten (10) day period, the contractor must submit, in writing, why such corrective action has not been performed. The University reserves the right to determine whether such noncompliance may be construed as a failure of performance of the contractor.

Termination of contract by contractor without cause can only occur with at least one hundred and twenty (120) days' notice prior to the proposed termination of the contract.

In the event MSU employs attorneys or incurs other expenses it considers necessary to protect or enforce its rights under this contract, the contractor agrees to pay the attorney's fees and expenses so incurred by MSU.

12. ACCEPTANCE TIME

Proposal shall be valid for one hundred and eighty (180) days following the proposal's due date.

13. RFP CANCELLATION

This RFP in no manner obligates MSU to the eventual purchase of any services described, implied or which may be proposed until confirmed by a written contract. Progress towards this end is solely at the discretion of MSU and may be terminated without penalty or obligations at any time prior to the signing of a contract. MSU reserves the right to cancel this RFP at any time, for any reason, and to reject any or all proposals or any parts thereof.

14. INDEPENDENT CONTRACTOR CLAUSE

The contractor shall acknowledge that an independent contractor relationship is established and that the employees of the contractor are not, nor shall they be deemed employees of MSU and that employees of MSU are not, nor shall they be deemed employees of the contractor.

15. DISCLOSURE OF PROPOSAL CONTENTS

Proposals will be kept confidential until evaluations and award are completed by MSU. At that time, all proposals and documents pertaining to the proposals will be open to the public, except for material that is clearly marked proprietary or confidential.

IMPORTANT! The offeror/proposer should mark all pages of the proposal considered to be proprietary information which may remain confidential in accordance with Mississippi Code Annotated 25-61-9 and 79-23 1 (1972, as amended). Each page of the proposal that the proposer considers trade secrets or confidential commercial or financial information should be on a different color paper than non-confidential pages and be marked in the upper right-hand corner with the word "CONFIDENTIAL."

Failure to clearly identify trade secrets or confidential commercial or financial information will result in that information being released subject to a public records request.

16. OTHER CONTRACT REQUIREMENTS

Award Terms: This contract shall be awarded at the discretion of the University based on the capabilities and overall reputation of the Supplier, as well as the cost. Acceptance shall be confirmed by the issuance of a contract from the University.

Standard Contract: The awarded contractor(s) will be expected to enter into a contract that is in substantial compliance with MSU's standard contract

https://www.contracts.msstate.edu/sites/www.contracts.msstate.edu/files/2025-03/Standard_Services_Contract2023Oct18.docx. Proposal should include any changes desired

to the standard contract. It should also be noted that there are many clauses which the MSU cannot change. (see Standard Addendum

<https://www.contracts.msstate.edu/sites/www.contracts.msstate.edu/files/2025-03/standardaddendum.pdf>) Significant changes to the standard contract may be cause for

rejection of a proposal.

The Procurement Process: The following is a general description of the process by which a firm will be selected to fulfill this Request for Proposal.

- Request for Proposals (RFP) is issued to prospective suppliers.
- A deadline for written questions is set.
- Proposals will be received as set forth in Section 8.
- Unsigned proposals will not be considered.
- All proposals must be received by MSU no later than the date and time specified on the cover sheet of this RFP.
- At that date and time, the package containing the proposals from each responding firm will be opened publicly and the name of each respondent will be announced.
- Proposal evaluation: The University will review each proposal.
- At their option, the evaluators may request oral presentations or discussions for the purpose of clarification or to amplify the materials presented in the proposal
- Respondents are cautioned that this is a request for proposals, not a request to contract, and the MSU reserves the unqualified right to reject all proposals when such rejection is deemed to be in the best interest of the University.
- The proposals will be evaluated according to the criteria set forth in Section 7.

APPENDIX A: SIGNATURE PAGE

Provide information requested, affix signature and return this page with your proposal:

Name of Firm: _____

Complete Address: _____

Telephone Number: _____

E-mail Address: _____

Authorized Signature: _____

Printed Name: _____

Title: _____