

**REQUEST FOR PROPOSAL**  
**RFP #922577**

**Research Participant Compensation Solution**

<b>RFP Timeline</b>	
RFP Issue Date:	May 19, 2026
Deadline for Respondent Questions to MSU:	June 8, 2026
<b>RFP Response Due Date:</b>	<b>July 20, 2026, 3:00 pm Eastern</b>
Estimated Contract Award	September 2026

<b>RFP Contact</b>	
Name:	Amber Marr
Unit:	MSU Procurement
Email:	amber.marr@msu.edu
Phone:	517-884-6166

**DESCRIPTION:** Michigan State University (the “**University**” or “**MSU**”) is soliciting proposals through this Request for Proposal (“**RFP**”) for the purpose of a Research Participant Compensation Solution. The requested services are more thoroughly described under the Scope of Work Section of this RFP. Firms intending to respond to this RFP are referred to herein as a “**Respondent**” or “**Supplier.**”

**PROPOSAL INSTRUCTIONS**

- PROPOSAL PREPARATION.** The University recommends reading all RFP materials prior to preparing a proposal, particularly these Proposal Instructions. Respondents must follow these Proposal Instructions and provide a complete response to the items indicated in the table below. References and links to websites or external sources may not be used in lieu of providing the information requested in the RFP within the proposal. Include the Respondent’s company name in the header of all documents submitted with your proposal.

Document	Description	Response Instructions
Cover Page	Provides RFP title and number, important dates, and contact information for MSU	Informational
Proposal Instructions	Provides RFP instructions to Respondents	Informational
Respondent Information Sheet	Company and Contact Information, and Experience	Respondent must complete and submit by proposal deadline
Scope of Work	Describes the intended scope of work for the RFP	Respondent must complete and submit by proposal deadline
Pricing	Pricing for goods and services sought by the University through this RFP	Respondent must complete and submit by proposal deadline
Master Service Agreement	Provides legal terms for a contract awarded through this RFP	Deemed accepted by Respondent unless information required in <b>Section 9, Master Service Agreement</b> is submitted by proposal deadline
HECVAT	Provides security information	Respondent must complete and submit by proposal deadline
VPAT	Provides accessibility information	Respondent must complete and submit by proposal deadline
Mandatory Minimum Requirements Document	Includes information about the supplier solution’s capabilities	Respondent must complete and submit by proposal deadline

**2. EXPECTED RFP TIMELINE.**

Activity	Date
Issue RFP	May 19, 2026
Deadline for Respondent Questions to MSU	June 8, 2026
<b>RFP Response Due</b>	<b>July 20, 2026, 3:00 pm Eastern</b>
Estimated Contract Award	September 2026

3. **CONTACT INFORMATION FOR THE UNIVERSITY.** The sole point of contact for the University concerning this RFP is listed on the Cover Page. Contacting any other University personnel, agent, consultant, or representative about this RFP may result in Respondent disqualification.
4. **QUESTIONS.** Respondent questions about this RFP must be submitted electronically by email to the contact listed on the cover page of this RFP. In the interest of transparency, only written questions are accepted. Answers to all questions will be sent to Respondents via email. Submit questions by referencing the following: (i) Question Number, (ii) Document Name, (iii) Page Number, and (iv) Respondent Question. Please refer to **Section 2** above for the deadline to submit questions.
5. **MODIFICATIONS.** The University may modify this RFP at any time. Modifications will be sent via email. This is the only method by which the RFP may be modified.
6. **DELIVERY OF PROPOSAL.** The Respondent must submit its proposal, all attachments, and any modifications or withdrawals electronically via email to the contact listed on the cover page of this RFP. **The price proposal should be saved separately from all other proposal documents and should be sent as a separate attachment from the other proposal documents.** The Respondent should submit all documents in a modifiable (native) format (examples include but are not limited to: Microsoft Word or Excel and Google Docs or Sheets). In addition to submitting documents in a modifiable format, the Respondent may also submit copies of documents in PDF. Respondent’s failure to submit a proposal as required may result in disqualification. The proposal and attachments must be fully uploaded and submitted prior to the proposal deadline. **Do not wait until the last minute to submit a proposal.** The University **may not** allow a proposal to be submitted after the proposal deadline identified in the Cover Page, even if a portion of the proposal was already submitted.
7. **MANDATORY MINIMUM REQUIREMENTS.** The RFP may contain minimum qualifications, which will be identified as “**Mandatory Minimum Requirements**” in the Scope of Work Section of this RFP. If the RFP does contain mandatory minimum requirements, any proposal not meeting these minimum requirements **will be deemed non-qualified and will not be considered.** All proposals meeting these mandatory minimum requirements will proceed for review and evaluation consistent with **Section 8, Evaluation Process.**
8. **EVALUATION PROCESS.** The University will convene a team of individuals from various Departments within MSU to evaluate each proposal based on each Respondent’s ability to provide the required services, taking into consideration the overall cost to the University. The University may require an oral presentation of the Respondent’s proposal; conduct interviews, research, reference checks, and background checks; and request additional price concessions at any point during the evaluation process. The following criteria will be used to evaluate each proposal:

Criteria	Weight
Ability to meet the requirements of the Statement of Work	20%
Goods/services offered	20%
Availability of training	5%
Experience/references	5%
University’s evaluation of proposed solution’s security/accessibility/privacy	15%
Helpdesk support availability	5%
Total Cost to MSU	20%
Supplier Risk	5%
Acceptance of and adherence to legal terms	5%
	<b>100%</b>

9. **MASTER SERVICE AGREEMENT.** The University strongly encourages strict adherence to the terms and conditions set forth in the Master Service Agreement. The University reserves the right to deem a proposal non-responsive for failure to accept the Master Service Agreement. Nevertheless, the Respondent may submit proposed changes to the Master Service Agreement in track changes (i.e., visible edits) with an explanation of the Respondent's need for each proposed change. Failure to include track changes with an explanation of the Respondent's need for the proposed change constitutes the Respondent's acceptance of the Master Service Agreement. General statements, such as "the Respondent reserves the right to negotiate the terms and conditions," may be considered non-responsive.
10. **CLARIFICATION REQUEST.** The University reserves the right to issue a Clarification Request to a Respondent to clarify its proposal if the University determines the proposal is not clear. Failure to respond to a Clarification Request timely may be cause for disqualification.
11. **RESERVATIONS.** The University reserves the right to:
- a. Disqualify a Respondent for failure to follow these instructions.
  - b. Discontinue the RFP process at any time for any or no reason. The issuance of an RFP, your preparation and submission of a proposal, and the University's subsequent receipt and evaluation of your proposal does not commit the University to award a contract to you or anyone, even if all the requirements in the RFP are met.
  - c. Consider late proposals if: (i) no other proposals are received; (ii) no complete proposals are received; (iii) the University received complete proposals, but the proposals did not meet mandatory minimum requirements or technical criteria; or (iv) the award process fails to result in an award.
  - d. Consider an otherwise disqualified proposal, if no other proposals are received.
  - e. Disqualify a proposal based on: (i) information provided by the Respondent in response to this RFP; or (ii) if it is determined that a Respondent purposely or willfully submitted false or misleading information in response to the RFP.
  - f. Consider prior performance with the University in making its award decision.
  - g. Consider total-cost-of-ownership factors (e.g., transition and training costs) when evaluating proposal pricing and in the final award.
  - h. Refuse to award a contract to any Respondent that has outstanding debt with the University or has a legal dispute with the University.
  - i. Require all Respondents to participate in a Best and Final Offer round of the RFP.
  - j. Enter into negotiations with one or more Respondents on price, terms, technical requirements, or other deliverables.
  - k. Award multiple, optional-use contracts, or award by type of service or good.
  - l. Evaluate the proposal outside the scope identified in **Section 8, Evaluation Process**, if the University receives only one proposal.
  - m. Obtain and consider information from other sources concerning a Respondent, such as the Respondent's capability and performance under other contracts, the qualifications of any subcontractor identified in the Proposal, the Respondent's financial stability, past or pending litigation, and other publicly available information.
  - n. Utilize third parties to assist in the evaluation process, provided such parties are subject to confidentiality requirements.
12. **AWARD RECOMMENDATION.** The contract will be awarded to the responsive and responsible Respondent who offers the best value to the University, as determined by the University. Best value will be determined by the Respondent meeting any mandatory minimum requirements and offering the best combination of the factors in **Section 8, Evaluation Process**, and price, as demonstrated by the proposal. The University will email a **Notice of Award** to all Respondents. A Notice of Award does not constitute a contract, as the parties must reach final agreement on a signed contract before any services can be

provided. The awarded Respondent is prohibited from partnering with losing bidders unless the RFP specifically allows for such arrangement, and any violation of this prohibition may result in disqualification of the awarded Respondent.

- 13. GENERAL CONDITIONS.** The University will not be liable for any costs, expenses, or damages incurred by a Respondent participating in this solicitation. The Respondent agrees that its proposal will be considered an offer to do business with the University in accordance with its proposal, including the Master Service Agreement, and that its proposal will be irrevocable and binding for a period of 180 calendar days from date of submission. If a contract is awarded to the Respondent, the University may, at its option, incorporate any part of the Respondent's proposal into the contract. This RFP is not an offer to enter into a contract. This RFP may not provide a complete statement of the University's needs, or contain all matters upon which agreement must be reached. Proposals submitted via email are the University's property.
- 14. FREEDOM OF INFORMATION ACT.** Respondent acknowledges that any responses, materials, correspondence or documents provided to the University may be subject to the State of Michigan Freedom of Information Act ("FOIA"), Michigan Compiled Law 15.231 *et seq.*, and may be released to third parties in compliance with FOIA or any other law. Questions about the Respondent's own performance can be directed to the RFP Contact indicated on page 1 of this document. Questions about the overall evaluation and any other post-award inquiries must be submitted via a formal FOIA request to the [Michigan State University FOIA office](#).

**RESPONDENT INFORMATION SHEET**

Please complete the following Information Sheet in the space provided:

Information Sought	Response
<b>Contact Information</b>	
Respondent's sole contact person during the RFP process. Include name, title, address, email, and phone number.	
Person authorized to receive and sign a resulting contract. Include name, title, address, email, and phone number.	
<b>Respondent Background Information</b>	
Legal business name and address. Include business entity designation, e.g., sole proprietor, Inc., LLC, or LLP.	
What state was the company formed in?	
Main phone number	
Website address	
DUNS# AND/OR CCR# (if applicable):	
Number of years in business and number of employees	
Legal business name and address of parent company, if any	
Has your company (or any affiliates) been a party to litigation against Michigan State University? If the answer is yes, then state the date of initial filing, case name and court number, and jurisdiction.	
<b>Experience</b>	
Describe relevant experiences from the last 5 years supporting your ability to successfully manage a contract of similar size and scope for the services described in this RFP.	
<b>Experience 1</b>	
Company name Contact name Contact role at time of project Contact phone Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	
<b>Experience 2</b>	
Company name Contact name Contact role at time of project Contact phone	

**MICHIGAN STATE**  
**UNIVERSITY**

Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	
<b>Experience 3</b>	
Company name Contact name Contact role at time of project Contact phone Contact email	
1. Project name and description of the scope of the project 2. What role did your company play? 3. How is this project experience relevant to the subject of this RFP?	
Start and end date (mm/yy – mm/yy)	
Status (completed, live, other – specify phase)	

## **SCOPE OF WORK**

*Please address each of the sections below in a written response, which can be completed on a separate sheet (using the same section headings).*

### **1. Background.**

#### GENERAL PURPOSE

Michigan State University Procurement is issuing this RFP for the procurement of an enterprise research participant incentive compensation solution. All payment options in this solution shall only be for compensating research participants. Multiple awards may be issued from this RFP.

#### UNIVERSITY OVERVIEW

Michigan State University has been advancing the common good with uncommon will for more than 165 years. A top global university, MSU pushes the boundaries of discovery to make a better world while providing students with life-changing opportunities.

Founded in 1855, MSU is the nation's premier land-grant university. It is one of only 17 land-grant universities in the prestigious Association of American Universities, a leading global public research university and a member of the Big Ten athletic conference. The main campus - one of the biggest and greenest in the nation - is located in East Lansing, three miles east of Michigan's capitol in Lansing.

MSU offers more than 400 academic programs through 17 degree-granting colleges. Top-ranked programs, high-quality opportunities, and a diverse, inclusive and collaborative community enable Spartan students to create personalized paths that prepare them to succeed and lead. MSU has 32 undergraduate and graduate programs and concentrations ranked in the top 25 nationally by U.S. News & World Report, including nine No. 1-ranked programs.

MSU has more than 50,000 students, with approximately 40,000 undergraduates and 11,000 graduate and professional students. About 78% of MSU students are from Michigan (all 83 counties represented), with additional representation from the other 49 states and about 140 countries. The undergraduate recruiting class each year is around 8,400 students.

#### CURRENT ENVIRONMENT

- Michigan State University is an R1 research university, classified as having "Very High Research Activity" by the Carnegie Classification of Institutions of Higher Education.
- Sponsored research of about \$932 million in expenditures in 2024.
- As the nation's pioneer land-grant university, MSU continues in that tradition through state-wide agricultural extension agencies, and experimental research stations funded separately by the state of Michigan.
- Research initiatives and projects often include research participants who may be compensated for their participation. The compensation is in the form of physical gift cards, e-gift cards, physical debit cards, ACH, reloadable e-gift cards and e-debit cards, paper checks, promotional items/swag, cash, and other methods, provided to the participants for their time and effort in participating in research initiatives and projects, any approved expenses incurred, and to incentivize participation to improve and increase recruitment and retention rates.
- MSU's current process for research participant compensation is fragmented, inefficient, and decentralized across the University's colleges and research departments.

- Volume of research participants:
  - MSU issued approximately \$1.5M-\$2.3M in research participant compensation annually between 2021-2025 using various payment methods. MSU is estimated to issue over \$2M in research participant compensation in 2026. Compensation amounts typically range between \$5.00-\$100.00 per participant per research study. Compensation amounts may go higher for longitudinal studies like clinical trials.

## 2. Scope of Work.

Michigan State University is seeking an enterprise research participant incentive compensation program that can provide the following:

1. Gift cards, either physical or electronic, for use at retail stores, restaurants, grocery stores, fuel stations, etc.
2. Pre-loaded, reloadable, either physical or electronic Mastercard or Visa Gift cards for use wherever major credit cards are accepted. No additional fees to purchase, activate, or use.
3. Option for payments that are transferred directly to bank accounts, Venmo, PayPal, etc.

## 3. Specifications:

Mandatory Minimum Requirements (Please refer to, and complete, the provided spreadsheet)

- i. Must provide flexibility and availability of using a variety of compensation amounts and methods (i.e., participants choose type of incentive and redemption options)
- ii. Must indicate whether any gift/debit card options can have usage restrictions assigned (e.g., tobacco products, alcohol), and whether exceptions to restrictions can be assigned (e.g., restaurants that also serve alcohol can be designated as acceptable or unacceptable)
- iii. Must provide the ability to compensate research participants multiple times during the research study, regardless of the length of the study
- iv. Must provide virtual incentive compensation via email
- v. Must provide a clear fee schedule listing all fees to researchers and participants
- vi. Must provide a tax exemption to MSU on fees and other charges
- vii. Must provide a clear list of any fund expiration rules and specify what happens to any funds that expire or time out
- viii. Must provide simple and expedited process for MSU to receive refunds for funds that are deposited but not used
- ix. Must provide simple and expedited process for MSU to cancel and receive refunds for funds that are issued to participants but not redeemed within a specified period
- x. Must provide a dashboard for each department with the ability to create multiple research study accounts and monitor delivery success
  - a. Must include options for designating account partitioning and access permissions for individual research staff
  - b. Must include access permissions by role such that staff in billing/funding roles can be restricted from viewing identifiable participant information, for example
- xi. Must provide downloadable reporting options:
  - a. Must include payment information by department (i.e., research study, date, amount, totals)

- b. Must include payment information by research study (i.e., recipient, date, amount, totals)
- c. Must include payment information that identifies payments exceeding a specified dollar amount in a calendar year for tax reporting purposes
  - i. Must include monitoring of participant accounts and alerting of University contact when participant nears the specified payout amount
  - ii. Must include automated W-9 request sent to participants when participant payments exceed specified dollar amount per calendar year
- d. Must include information that identifies payments to non-US citizens
  - i. Must include automated W-8BEN request for participants who are non-US citizens
- xii. Must specify what participant data are required to use the service, particularly regarding sensitive data such as social security numbers
- xiii. Must provide the ability for each department to view only their participants, research studies, and payments
- xiv. Must provide participants a method to view card account for available balances
  - a. The method must be easy to navigate and be at no cost to the participant
- xv. Must provide a user-friendly interface (front end and back end)
- xvi. Must provide an easy onboarding and registration process
- xvii. Must provide a system that is secure and protects privacy and all personally identifiable information (PII) of the participant, with clear privacy and security language and no data sharing
- xviii. Must provide a current HECVAT as part of the proposal
  - a. Due to the potential storage of PII and financial data of the participant, an IT Security review of the HECVAT is required.
  - b. Please find the most current version of the HECVAT security survey here: [Higher Education Community Vendor Assessment Tool \(HECVAT\)](#). Review the information on the page, download and complete the questionnaire, and return the completed form to MSU with your proposal.
- xix. Must provide a current VPAT as part of the proposal
  - a. The University is required to comply with the Americans with Disabilities Act of 1990 (ADA) and has adopted a formal policy regarding accessibility requirements for websites and software applications. Supplier's software must comply, where relevant, with level AA of the World Wide Web Consortium (W3C) Web Content Accessibility Guidelines (WCAG) 2.0 Level AA.
    - i. Respondent must have experience working with Higher Education Institutions similar in size to University
    - ii. Respondent platform/Software must comply, where relevant, with level AA of the World Wide Web Consortium (W3C) Web Content Accessibility Guidelines (WCAG) 2.2.

**Preferred Requirements**

- i. Provide ability to add local vendors to list of options
- ii. Provide the ability to reload virtual and physical gift cards

- iii. Provide physical gift cards that can be provided to participants during an onsite study
- iv. Provide virtual incentive compensation via text
- v. Batch options:
  - a. Spreadsheet uploads for high volume distributions
  - b. Ability to resend all un-redeemed electronic cards without re-entering each individually
- vi. Describe any APIs available for integration with other research platforms
- vii. The solution may include the ability to integrate with Spartan Marketplace. Suppliers should indicate in their response whether this capability is supported:
  - a. MSU's branded, e-commerce shopping portal for its end-users, Spartan Marketplace, utilizes the ESM Solutions platform. Consequently, Supplier would be able to integrate with ESM Solutions, including the following functionality:
    - b. Searchable SKUs within catalog
    - c. Supplier punch-out catalog linked to MSU ESM Solutions
    - d. Ability to limit access to specific subcategories (e.g., laptops) in the punch-out catalog
    - e. Ability to invoice MSU via cXML or EDI through ESM Solutions

#### **4. Proposal Requirements**

- 1. Written response to proposed program, including Specifications from Section 3 above, completion of the Mandatory Minimum Requirements spreadsheet, and the following information:
  - i. Description of platform capabilities and options
  - ii. Account setup and registration process
  - iii. Identification of all information collected from participants and stored in the platform
  - iv. Detailed description of procedure for handling unused funds on issued cards or in payment accounts
  - v. Detailed description of procedure for handling unused funds on unissued cards
  - vi. Detailed description on process to cancel an order or return a gift card
  - vii. Detailed description of process to de-activate, track usage, and verify gift card balances and payment account balances
  - viii. Expiration dates for physical and electronic gift cards
  - ix. Detailed procedure for cancelling and reissuing lost gift cards or other types of compensation
  - x. Describe any fees or penalties that may be assessed on the account
  - xi. Provide list of technology participants must be capable of using
  - xii. Provide description of the card capabilities
    - a. Chip
    - b. eWallet
  - xiii. Types of gift cards available and where they can be used
  - xiv. Types of compensation methods including timing of distributions for each
  - xv. Availability of instant issue cards and if a stock of these cards can be provided to each department
  - xvi. Provide name and details for the issuing bank for the compensation program, if applicable

# MICHIGAN STATE UNIVERSITY

- xvii. Provide a list of any and all third parties and/or subcontractors that respondent intends or may intend to use
  - xviii. Training availability, customer support/helpdesk availability, documents, plans, and opportunities
  - xix. Availability to request documentation regarding program processes or review of processes in the event of an audit
2. Completed Respondent Information Sheet with the 3 required experiences.
  3. Signed Pricing Proposal valid for 180 days and confirming acceptance of payment terms
  4. HECVAT, required
    - i. Please find the most current version of the HECVAT security survey here: [Higher Education Community Vendor Assessment Tool \(HECVAT\)](#). Review the information on the page, download and complete the questionnaire, and return the completed form to MSU as part of the submitted proposal.
  5. VPAT, required
    - i. Other 3rd Party Accessibility Evaluation, optional, but cannot take the place of the VPAT
  6. Master Service Agreement (if requesting redlines)
  7. Pricing proposal

**PRICING**

*Please include a Pricing proposal as identified below on a separate sheet.*

An itemized budget of costs for each item to be provided under this contract must be submitted by the respondent. This budget must also include any pricing for implementation of the solution, fees that University may be charged (ex. transaction fees, processing fees, shipping charges for physical cards, etc.). and all costs the University and/or participants will incur for using the respondent's solution.

Pricing proposal must also include:

1. Year one total costs
2. Year two total costs
3. Year three total costs

Pricing shall be fixed for the initial contract period selected by the University.

Please provide how pricing will be determined at the conclusion of the initial 3-year contract period.

The signature below confirms that this proposal is valid for 120 days after the due date.

**Supplier**

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Company: \_\_\_\_\_

Date:

**MASTER SERVICE AGREEMENT**

(attached as a separate document)

*Please refer to Section 9 of the RFP Instructions when reviewing the Master Services Agreement terms and conditions.*