MICHIGAN STATE UNIVERSITY

REQUEST FOR PROPOSAL
RFP# 956564

Enterprise Report Management Software

RFP Timeline	
RFP Issue Date:	November 5, 2026
Deadline for Respondent Questions to MSU:	November 13, 2026
RFP Response Due Date:	**December 9, 2026, 3:00 pm Eastern**
Estimated Contract Award	February, 2027

RFP Contact	
Name:	Lisa True
Unit:	MSU Procurement
Email:	truelisa@msu.edu

DESCRIPTION: Michigan State University (the "**University**" or "**MSU**") is soliciting proposals through this Request for Proposal ("**RFP**") for the provision, implementation, and support of an Enterprise Report Management software. 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**."

MICHIGAN STATE UNIVERSITY

PROPOSAL INSTRUCTIONS

1. **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**
List of critical questions		**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 (COTS Software)	Provides legal terms for a contract awarded through this RFP	Deemed accepted by Respondent unless information required in **Section 9, Master Service Agreement** is submitted by proposal deadline
Higher Education Community Vendor Assessment Tool (HECVAT)	Security self-assessment questionnaire used by higher education institutions to evaluate third-party vendor	**Respondent must complete and submit by proposal deadline**

2. **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.

3. **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.

4. **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.

5. **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.

6. **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**.

7. **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
Functional and Technical Requirements	25%
Enterprise Report Management Capabilities	15%
Implementation, Migration, and Support	20%
Supplier Experience and References	10%
Pricing	30%
	100%

8. **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.

9. **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.

10. **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.

11. **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.

12. **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.

13. **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.

MICHIGAN STATE UNIVERSITY

RESPONDENT INFORMATION SHEET

Please complete the following Information Sheet in the space provided:

Information Sought	Response
Contact Information	
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.	
Respondent Background Information	
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	
Would this represent a material portion of your organization's annual revenue?	
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.	
Experience	
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.	
Experience 1	
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)	
Experience 2	
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)	
Experience 3	
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)	

MICHIGAN STATE UNIVERSITY

LIST OF CRITICAL QUESTIONS

Please complete the following Information Sheet in the space provided:

Questions	Response
Does the platform provide an API call that is able to see which documents/files the user has access to where the results contain metadata about each file as well as some sort of file identifier?	
Does the platform provide an API call that would allow the form to download the file based on the file identifier?	
What data security protocols and controls does the product have to protect data throughout its life cycle?	

MICHIGAN STATE UNIVERSITY

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**.
   Michigan State University (MSU) Information Technology seeks proposals from qualified suppliers for an Enterprise Report Management solution to replace its current report management platform. The selected solution will provide enterprise report archiving, long-term retention, secure web-based access, report search capabilities, and integration with existing university systems.

   The proposed solution must support on-premise deployment and provide a migration path from the current platform while minimizing disruption to existing business processes.

2. **Scope of Work**.

   I. Functional Requirements

   The solution shall provide the following functionality:

- Adjustable and long-term report retention policies
- Active Directory integration
- SSO Integration with Okta: SAML, OIDC, and Shibboleth
- Multi-Factor Authentication (MFA) through Okta
- Rule-Based and Group-Based Access Controls
- Applicable security standards and state of compliance
- Browser-based access and viewing of reports
- PDF viewing
- AFP support
- PCL support
- PostScript support
- TIFF support
- Ability to print reports
- Ability to download reports
- Ability to export reports
- Enterprise report archiving
- Report indexing and searching
- API integration capabilities
- Advanced search functionality
- Fast search performance – only provides results based off search
- Simplified administration tools
- Simplified diagnostic logging
- Intuitive user interface

Supplier Response: For each requirement, indicate whether your solution **Fully Meets**, **Partially Meets**, or **Does Not Meet** the requirement. For any requirement marked **Partially Meets** or **Does Not Meet**, provide a detailed explanation in the Comments column, including any required configuration, customization, third-party software, additional licensing, limitations, or additional costs.

Functional Requirement	Fully Meets Requirements	Partially Meets Requirements (Configuration/ Customization Required)	Does Not Meet Requirements	Comments
Adjustable and long-term report retention policies	○	○	○	
Active Directory integration	○	○	○	
Single Sign-On (SSO) support	○	○	○	
Multi-Factor Authentication (MFA) through Okta	○	○	○	
Browser-based access and viewing of reports	○	○	○	
PDF viewing	○	○	○	
AFP support	○	○	○	
PCL support	○	○	○	
PostScript support	○	○	○	
TIFF support	○	○	○	
Ability to print reports	○	○	○	
Ability to download reports	○	○	○	
Ability to export reports	○	○	○	
Enterprise report archiving	○	○	○	
Report indexing and searching	○	○	○	
API integration capabilities	○	○	○	
Advanced search functionality	○	○	○	
Fast search performance; returns only records matching search criteria	○	○	○	
Simplified administration tools	○	○	○	
Simplified diagnostic logging	○	○	○	

Intuitive user interface	○	○	○	

II. Technical Requirements

The solution shall support the following technical requirements:

- Role-based and group-based permissions
- Audit logging
- Access logging
- Session timeout controls
- On-premise deployment
- Windows or Linux Server support
- Virtual machine deployment support
- Separate Test (optional), QA, and Production environments
- Reduced or no-cost licensing for non-production environments

Supplier Response: *Describe your technical architecture, supported operating systems, deployment options, security controls, environment management, and licensing structure for non-production environments.*

III. Data Migration and Implementation

MSU requires migration of reports and associated metadata from the current platform to the proposed solution.

- Migration methodology and tools
- Data validation approach
- Implementation timeline
- Training and knowledge transfer
- Post-implementation support

Supplier Response: *Describe your migration strategy, implementation approach, estimated timeline, staffing plan, training services, and ongoing support model.*

3. Security Risk Assessment

Supplier acknowledges that it will be subject to a Service Provider Security Assessment (SPSA) due to the confidential nature of the data involved. This will include submitting a completed Higher Education Community Vendor Assessment Toolkit (HECVAT) v4.1.6 (or most current version). Please review the information on the HECVAT here: (REN-ISAC: Research Education Networking Information Sharing & Analysis Center). Suppliers will be required to download the HECVAT, complete, and return it to MSU.

Supplier Response:

Supplier shall provide a completed HECVAT.

MICHIGAN STATE UNIVERSITY

PRICING

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

Suppliers must provide pricing for on-premises deployment under both a perpetual license model and a subscription license model, where applicable. Subscription pricing should reflect software installed and operated within the University's environment and should not assume a SaaS or vendor-hosted offering unless clearly identified as an optional alternative. Suppliers shall identify all licensing requirements for production, development, test, QA, staging, and disaster recovery environments.

Option A – Perpetual License Model

Pricing Component	Unit of Measure	Supplier Cost
Perpetual Software License Fee	One-Time	$
Annual Maintenance and Support (Year 1)	Annual	$
Annual Maintenance and Support (Year 2)	Annual	$
Annual Maintenance and Support (Year 3)	Annual	$
Annual Maintenance and Support (Year 4)	Annual	$
Implementation Services	One-Time	$
Data Migration Services	One-Time	$
API Integration Services	One-Time	$
Test Environment Licensing	One-Time	$
QA Environment Licensing	One-Time	$
Training Services	One-Time	$
Professional Services (Hourly Rate)	Hourly	$
Additional Optional Services (Specify)	Describe	$
Total Cost for Full Contract Term	Total	$

Option B – Subscription Model

Pricing Component	Unit of Measure	Supplier Cost
Annual Subscription Fee (Year 1)	Annual	$
Annual Subscription Fee (Year 2)	Annual	$
Annual Subscription Fee (Year 3)	Annual	$
Annual Subscription Fee (Year 4)	Annual	$
Implementation Services	One-Time	$
Data Migration Services	One-Time	$
API Integration Services	One-Time	$
Training Services	One-Time	$
Professional Services (Hourly Rate)	Hourly	$
Additional Optional Services (Specify)	Describe	$

Total Cost for Full Contract Term	Total	$

Note: Suppliers shall assume annual maintenance and support is required throughout the contract term under both pricing models. The Total Cost for Full Contract Term should include all applicable licensing/subscription, maintenance, support, implementation, migration, and other proposed fees. Pricing shall be valid for a minimum of 180 days from the proposal's due date. Suppliers shall identify any additional costs not listed.

Supplier Pricing Response: *Suppliers shall provide a detailed pricing narrative that identifies all assumptions, licensing metrics, maintenance and support inclusions, renewal pricing methodology, and any volume-based or educational discounts. Suppliers shall clearly identify any costs not included in the pricing tables.*

Additional Supplier Questions

1. What is the cost to reinstate maintenance and support after a lapse?
   Answer:

2. Are security patches provided to perpetual license customers without an active maintenance agreement? If yes, for how long?
   Answer:

3. Are software upgrades and new releases included with maintenance and support?
   Answer:

4. Describe any limits on annual maintenance, support, or subscription fee increases.
   Answer:

5. What are the key differences between your perpetual licensing model and subscription licensing model, including functionality, upgrade rights, support entitlements, and long-term cost considerations?
   Answer:

6. Describe licensing requirements and support coverage for Development, Test, QA, Staging, and Disaster Recovery environments. Indicate whether these environments are included, discounted, or licensed separately.
   Answer:

MICHIGAN STATE UNIVERSITY

MASTER SERVICE AGREEMENT
(COTS Software)

(attached)

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