Request for Proposals (RFP)

Shared Services Assessment Feasibility Study

Five Colleges, Incorporated (Five College Consortium)

Issue Date: 31 October 2025

Proposals Due: 12 December 2025, 12:00 NOON EST

Award Notice: 30 January 2026

1. Introduction

The member campuses of the Five College Consortium – Amherst, Hampshire, Mount Holyoke, and Smith Colleges, and the University of Massachusetts Amherst – seek proposals from qualified firms to conduct a comprehensive **Shared Services Assessment Feasibility Study**. The goal is to identify, evaluate, and prioritize opportunities for expanding shared administrative and operational services among Consortium member campuses to enhance institutional resilience, reduce costs, and improve service quality.

The Five College member campuses have a long-standing record of successful collaboration in academic programs, shared administrative services and contracts, and partnerships with external agencies and organizations. In 1965, the campuses established **Five Colleges, Incorporated (FCI)**, a 501(c)(3) whose purpose is "to enhance the member campuses." FCI can and does serve as an administrative and legal vehicle for shared programs, staffing, purchasing, funding flows, and enterprise platforms. The successful proposal will include a thoughtful and pragmatic plan for how FCI can be deployed and adapted to support an expanded portfolio of shared services.

The Consortium seeks a rigorous, evidence-based assessment – grounded in current-state data, benchmarking, and stakeholder input – that produces a prioritized roadmap with clear financial and operational implications, including tradeoffs and risks.[1]

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[1] Note that "Five College Consortium" and "Five Colleges, Incorporated" (or "FCI") are frequently used interchangeably. We have attempted here to distinguish between the collective group of campuses (the Consortium) and the nonprofit entity that facilitates their collaboration (FCI), but such distinctions are often blurry.

2. Background and Context

About the Consortium. The Five College Consortium is a nationally recognized collaboration among member campuses in western Massachusetts, whose shared activities are managed through Five Colleges, Incorporated (FCI). Over decades, the campuses have cooperated to share resources, jointly procure goods and services, and broaden academic opportunities while maintaining each institution's unique identity and mission. Notable existing shared services include Five College Net, LLC (a fiber optic network connecting all five campuses), the Library Annex (an off-site library storage facility), a Risk Management unit (providing risk mitigation, management, and compliance services, especially but not exclusively to the four private colleges), Collegiate Catalyst Fund, LLC (a captive insurance company serving the four private colleges and FCI), and shared staff positions in a range of functional areas ranging from IT applications development to event production management. Collectively the campuses' 2100 faculty teach 7000 courses and serve more than 40,000 students. FCI is led by a full-time executive director and governed by its Board of Directors, made up of the four College presidents and the University chancellor. Additional details about FCI's governance and operations are available at www.fivecolleges.edu/about-five-college-consortium.

About the Members:
University of Massachusetts Amherst, founded in 1863, is the UMass system's flagship and largest campus, with an enrollment of over 32,000 graduate and undergraduate students and 1,700 full time faculty. As of June 20, 2024, the University of Massachusetts Foundation had an endowment of $1.5 billion, of which ~$580 million is tied to the UMass Amherst campus. UMass Amherst provides a high quality, affordable, and accessible education and conducts robust programs of research and public service. Its commitment to accessibility, sustainability, and community engagement is reflected in initiatives like the Green Campus Initiative and the Center for Community Partnerships, making UMass Amherst a vibrant locus of higher education, innovation, and public service.

Founded in 1821 as a nonsectarian institution for "the education of indigent young men of piety and talents," Amherst College is widely regarded as one of the premier liberal arts colleges in the nation, enrolling a diverse group of approximately 1,900 undergraduates. Amherst is a well-positioned institution with an endowment exceeding $3.5 billion at June 30, 2024. Since its founding, Amherst has remained one of the few truly need-blind colleges in the nation; students are admitted without regard to financial aid, and each admitted student is guaranteed financial aid equal to financial need. By any measure of accessibility and quality Amherst is consistently ranked among the top schools in the country. Its outstanding resources, dedicated faculty and rigorous academic life allow the college to enroll students with an extraordinary range of talents, interests and commitments.

As one of the most innovative colleges in the country, Hampshire College helps each of its students pursue their passion by designing their own programs of study as a faculty committee guides them on a rigorous path of discovery. Hampshire is an independent, coeducational, liberal arts college located in Amherst, Massachusetts, supported by an endowment of $26.4 million as of June 30, 2024. Its primary mission is to graduate men and women with the skills and perspectives needed for understanding and participating responsibly and creatively in a complex world. The College, founded in 1965, is an innovative institution within the Five College consortium. Working with faculty members, Hampshire's students create rigorous programs of study designed to identify and accommodate their interests.

Smith College, founded in 1871, educates women of promise for lives of distinction and purpose. It has 2,500 undergraduate students and offers graduate degrees for both men and women. Located in Northampton, Smith is among the largest women's colleges in the United States. An independent, nondenominational college, Smith remains strongly committed to the education of women at the undergraduate level, but admits both men and women as graduate students. Smith's endowment is among the largest of any liberal arts college in the nation, with a value exceeding $2.5 billion as of June 30, 2024. A college of and for the world, Smith links the power of the liberal arts to excellence in research and scholarship, thereby developing engaged global citizens and leaders to address society's challenges.

Mount Holyoke College, located in South Hadley, enrolls about 2,200 mostly undergraduate students. The college is the leading gender diverse women's college and the nation's oldest continuing institution of higher learning for women with a legacy of preparing students for lives of thoughtful, effective, and purposeful engagement in the world. Founded in 1837 by chemist and revolutionary educator Mary Lyon, Mount Holyoke was the first of the Seven Sisters – the female equivalent of the predominantly male Ivy League. Mount Holyoke is a highly selective, non-sectarian, residential, research liberal arts college with a long tradition of educating women for active engagement in the world. With an endowment of $1.1 billion at June 30, 2024, the College is committed to the creation of a powerful learning environment in a way that affirms identity, builds community and prepares women for leadership in a pluralistic world.

Rationale for the Study. Higher education faces sustained headwinds – enrollment pressures, escalating costs, technology shifts, workforce challenges, and evolving student expectations. Against this backdrop, the member campuses are looking to build on the strength of the existing Consortium structure and programs by exploring an expanded array of shared services to (1) realize net cost savings; (2) deliver equal or improved service quality; (3) strengthen operational resilience; (4) reduce duplicative spend and technical debt; and (5) reinforce the strategic value of collaboration across public and private institutions.

Role of FCI. FCI's 501(c)(3) structure allows for shared contracts, staffing, and funding. The assessment should evaluate **operating models that leverage FCI** – including governance, legal/compliance considerations, and financial arrangements – alongside any required policy or bylaw updates to enable new or scaled shared services. Individual FCI projects and initiatives – including those produced via this RFP – need not include all five campuses as participating institutions.

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3. Objectives

The selected firm will deliver:

1. **Comprehensive Opportunity Assessment** of administrative/operational functions suitable for shared services, including feasibility, complexity, investment needs, and expected benefits.
2. **Quantified Cost Savings & Financial Model** (e.g., one-time and ongoing costs, savings ranges, total cost of ownership, NPV/ROI) under multiple scenarios.
3. **Prioritized Roadmap** highlighting "quick wins" (0-12 months), "near-term" (12-24 months), and "strategic" (24-48 months) opportunities with critical path dependencies.
4. **Service & Operating Model Options** (centralized, federated, hub-and-spoke), with implications for staffing, SLAs, process design, data governance, chargeback/funding models, and platforms – explicitly addressing how FCI can be deployed.
5. **Recommended Change-Management Strategy** to guide the subsequent phase(s) of project selection and implementation, including development of a shared framework for assessing project priority and feasibility.

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4. Scope of Work

4.1 In-Scope Functional Domains

The study should consider, at minimum, the following domains (final scope to be set during project initiation):

- **Procurement & Strategic Sourcing** (including group purchasing, contract lifecycle, vendor management, eProcurement, geothermal supplies/contractors, consultant retainers)
- **Finance & Accounting** (A/P, A/R, treasury, payroll integration points, travel/expense, grants post-award)
- **Human Resources & Shared Talent Services** (recruitment, onboarding, training/compliance, ombuds, HR systems; consider union and benefits implications)

- **IT & Digital Services** (infrastructure, cloud operations, help desk, identity and access, cybersecurity, enterprise applications, data platforms, and digital integrations)
- **Research Administration Support** (pre- and post-award operations, compliance)
- **Risk Management & Compliance** (including emergency preparedness, information security, privacy, accessibility)
- **Facilities & Energy Management** (maintenance, inspection, capital planning data, sustainability and decarbonization purchasing, waste management, storage)
- **Student Administrative & Support Services** (select areas such as scheduling support, testing centers, shared call centers, health and counseling operations, select advising or accommodation support where appropriate)
- **Libraries, Museums, & Scholarly Services** (licenses, repositories, shared platforms)
- **Auxiliaries & Shared Operations** (including dining/retail procurement, hotels, print/copy, mail/receiving, travel, transportation)
- **Training, Professional Development & Centers of Excellence** (e.g., shared analytics, project management, grants support)

Proposers may recommend additional or alternate domains where outsized value is likely.

4.2 Key Tasks

- **Current-State Discovery**
  - Inventory existing shared services and consortial contracts; catalog campus-specific services.
  - Map major processes and platforms; capture service-level baselines; review org structures and staffing.
  - Aggregate spend data (3 years where feasible), contract inventories, volumes, and performance metrics.
- **Benchmarking & Best Practices**
  - Compare against peer consortia and multi-campus shared services in higher education and adjacent sectors.
- **Option Development**
  - Propose feasible operating models (centralized via FCI, federated, hub-and-spoke, managed services hybrids).
  - Specify service catalogs, SLAs/KPIs, RACI/decision rights, and chargeback/funding options.
- **Financial Analysis**
  - Develop cost models including one-time implementation costs (technology, change, transition), steady-state run costs, and savings (labor, procurement, platform consolidation, risk avoidance).
  - Model scenarios (baseline, moderate consolidation, high consolidation) with sensitivity analysis.
- **Risk, Regulatory, and HR Implications**
  - Address public/private distinctions, labor and collective bargaining considerations, FERPA/HIPAA/data privacy, procurement statutes, and institutional policies.

- **Roadmap & Implementation Readiness**
  - Prioritize opportunities and define a sequenced roadmap with dependencies, resource requirements, and near-term pilots/quick wins.
  - Prepare change management and communications plan tailored to stakeholder groups.

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5. Deliverables

1. **Executive Summary** (plain-language findings, top recommendations, estimated savings ranges, and timeline)
2. **Comprehensive Assessment Report** including:
   - Current-state baselines and pain points
   - Opportunity catalog with feasibility scores
   - Operating model options and rationale
   - Tradeoff analysis and risk register
   - Governance framework and decision rights
3. **Financial Model Workbook** (Excel) with transparent assumptions, scenario toggles, NPV/ROI analysis, and a pricing/benefits waterfall.
4. **Prioritized Roadmap & Implementation Plan** (Gantt-level phases, milestones, dependencies, resourcing)
5. **FCI Enablement Blueprint**
   - Recommended role(s) of FCI across functions
   - Legal/contracting pathways; staffing models (employment, secondments, shared FTEs)
   - Chargeback and funding models; SLA templates; data governance alignment
6. **Stakeholder Engagement Summary** (methodology, participation, input themes, and feedback incorporation)
7. **Presentation(s)** to Consortium leadership and campus stakeholders

All deliverables must be provided in accessible formats (DOCX/PPTX/PDF; XLSX for models).

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6. Data & Access Requirements

The Consortium campuses and FCI will facilitate reasonable access to information and stakeholders including, where available:

- Organizational charts, role counts/FTE by function
- Policies, SLAs, process maps, and standard operating procedures
- 3 years of spend/transaction data (by category/supplier), contract lists, and pricing schedules
- System inventories (applications, integrations), license counts, and major platform contracts
- Case volumes and service metrics (e.g., tickets, processing times)

- HR data relevant to staffing models (role counts, vacancy rates, turnover) in aggregate, de-identified as needed
- Risk/compliance frameworks, audit findings (relevant high-level summaries)

Proposers should specify the **minimal necessary data** and propose a practical approach to privacy, de-identification, and secure transfer (e.g., SFTP, secure portals).

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7. Methodology & Approach Requirements

Proposals should outline a clear, phased methodology that includes:

- **Discovery:** Data collection plan, document review, and structured interviews/workshops across campuses and FCI
- **Analysis:** Benchmarking, process and service mapping, feasibility scoring, cost modeling
- **Design:** Operating model options, governance, SLAs/KPIs, chargeback options
- **Validation:** Iterative review with Consortium steering group and functional stakeholders
- **Synthesis:** Final recommendations, roadmap, and implementation plan with risk mitigation
- **Change Management:** Stakeholder analysis, communications strategy, training approaches
- **Equity and Sustainability Lens:** Address equity across campuses, accessibility, and sustainability/ESG goals in procurement and operations

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8. FCI as a Shared Services Enabler (Required Focus)

Proposals must address how FCI can be utilized and, if necessary, adapted to support expanded shared services, including:

- **Legal & Contracting:** Use of FCI as contracting entity; alignment with public/private constraints; data protection requirements; intellectual property considerations; potential bylaw or policy updates.
- **Staffing Models:** FCI hiring/shared staffing; secondments; pooled talent; Centers of Excellence; professional development pathways.
- **Financial Flows:** Budgeting, cost allocation/chargebacks, reserve policies, and transparency mechanisms.
- **Governance:** Board/committee structures, decision rights, dispute resolution, performance management, and stakeholder engagement.
- **Technology Ownership:** Platform hosting/licensing via FCI; shared data platforms; information security, identity, and access management.
- **Scalability & Interoperability:** Ensuring models can expand or adjust across member campuses with minimal rework.

9. Project Management & Timeline

Given the cadence of the academic year, project completion on or around **15 May 2026** would enable leadership presentations and key campus engagement to occur before the start of summer breaks, and for implementation planning and activity to begin during the summer of 2026. If full completion is not viable by mid May, substantive progress – including identification of at least some viable shared services – should be completed by 15 May 2026. Proposers should suggest a realistic timeline, including:

- **Phase 0: Mobilization (2-3 weeks)** – Confirm scope, workplan, governance, data requests, communications; finalize stakeholder map.
- **Phase 1: Discovery & Baselining (4-6 weeks)** – Data intake, interviews/workshops, initial benchmarking.
- **Phase 2: Analysis & Options (4-6 weeks)** – Feasibility scoring, financial modeling, operating model design.
- **Phase 3: Validation & Roadmap (3-4 weeks)** – Iterations with steering group; refine priorities, risks, and implementation plan.
- **Phase 4: Finalization (2-3 weeks)** – Complete deliverables; leadership presentations; handoff of tools/templates.

Include proposed **cadence** (steering updates, weekly check-ins) and a RACI for project governance.

10. Vendor Qualifications

Proposers must demonstrate:

- **Familiarity with consortial settings**, ideally in higher education.
- **Substantive experience** designing and implementing shared services in higher education, ideally involving both public and private institutions.
- **Expertise in financial modeling** for shared services (TCO, NPV/ROI, sensitivity analysis).
- **Knowledge of regulatory and compliance frameworks** relevant to higher education (FERPA, HIPAA where applicable, accessibility, information security, procurement regulations, labor/union environments).
- **Change management capabilities** and a track record of stakeholder engagement across diverse institutions.
- **Strong data handling and security practices** (secure transfer, storage, and access; de-identification; least-privilege access).
- **References** for at least **three** similar engagements; sample deliverables may be requested.

11. Proposal Instructions

11.1 Submission Format

Submit proposals electronically in PDF with the subject line "**RFP – Shared Services Assessment – Five Colleges, Incorporated**" to:

> Sarah Pfatteicher, Executive Director
> FCIExecDirector@fivecolleges.edu

11.2 Proposal Contents (Required)

1. **Cover Letter & Executive Summary**
2. **Understanding of the Assignment & Context**
3. **Proposed Methodology & Workplan**
   - Phasing, activities, artifacts, and milestones
   - Stakeholder engagement plan
   - Data request and security approach
4. **Team & Qualifications**
   - Roles, bios, relevant experience; time commitments
   - Diversity of team composition (optional reporting)
5. **Experience & Case Studies**
   - At least three relevant, outcome-focused examples with client references
6. **Project Management & Governance**
   - Steering approach, risk management, quality assurance
7. **FCI Enablement Approach**
   - Legal/contracting, staffing, governance, financial flows
8. **Financial Model Approach**
   - Cost/savings categories, scenario design, sensitivity analysis, TCO, NPV/ROI
9. **Change Management & Communications Plan**
10. **Deliverables & Timeline**
11. **Pricing & Commercials**
    - Fixed-fee or time-and-materials with not-to-exceed; rate card; assumptions; travel policy
    - Any optional services clearly separated
12. **Exceptions & Dependencies**
13. **Required Forms & Certifications** (see Section 15)

12. Pricing Guidance

Proposers should present **transparent pricing**, including:

- **Base Project Fee** by phase and workstream
- **Optional Add-Ons** (e.g., additional functional deep dives, implementation support)
- **Travel & Expenses Policy** (if applicable)
- **Key Assumptions & Dependencies** (e.g., timely data access, stakeholder availability)

If proposing time-and-materials, include a **not-to-exceed** amount and detailed rate card.

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13. Evaluation & Selection

13.1 Illustrative Evaluation Rubric (100 points total)

- **Understanding/Approach (50 pts):** Demonstrated grasp of goals; practicality of methodology; actionable design leveraging FCI; change management plan including stakeholder engagement/communications
- **Relevant Experience (35 pts):** Prior shared services work; consortial experience; outcomes; references; qualifications/availability of team
- **Pricing & Value (15 pts):** Clarity, competitiveness, assumptions

13.2 Milestones & Target Dates

- **RFP Issued:** 31 October 2025
- **Deadline for Questions:** 14 November 2025
- **Answers Posted:** 21 November 2025
- **Proposals Due:** 12 December 2025, 12:00 NOON EST
- **Vendor Presentations Completed (if requested):** 13 January 2026
- **Selection & Notice of Intent to Award:** 30 January 2026
- **Project Kickoff Target:** 17 February 2026
- **Mid-Project Report**: 31 March 2026
- **Final Report**: 15 May 2026
- **Executive Presentation(s):** 15-31 May 2026

FCI reserves the right to modify dates, request best and final offers (BAFO), and/or negotiate scope/pricing.

14. Terms & Conditions

- **Contracting Entity:** Five Colleges, Incorporated (FCI), a 501(c)(3) nonprofit.
- **Confidentiality:** Vendor must sign an NDA. All data and analyses are confidential and may not be shared without written consent.
- **Data Security:** Vendor must comply with Consortium security standards, use secure transfer and storage, and restrict access to need-to-know personnel.
- **Conflicts of Interest:** Disclose any actual or potential conflicts.
- **Intellectual Property:** All final deliverables created under this engagement shall be owned by FCI; vendor retains pre-existing IP and non-confidential know-how.
- **Compliance:** Vendor shall comply with applicable laws and regulations; where relevant, FERPA/HIPAA and accessibility requirements apply.
- **Insurance:** Provide proof of insurance (e.g., professional liability, cyber, general liability) with coverage limits acceptable to FCI.
- **No Commitment to Award:** FCI may reject any/all proposals, waive informalities, or cancel the RFP at any time.
- **Pricing Validity:** Proposals must remain valid for **180 days** from submission.

15. Required Forms & Certifications

- **Signed Cover Letter** by an authorized representative
- **Conflict of Interest Disclosure**
- **Insurance Certificates** (or attestation with ability to furnish upon award)
- **Data Security & Privacy Statement**
- **References & Contact Information**
- **Pricing Worksheet** (see Appendix B)

16. Proposal Questions

All questions must be submitted via email to Sarah Pfatteicher at FCIExecDirector@fivecolleges.edu by 14 November 2025 at 12:00 NOON EST with the subject line "**RFP Question – Shared Services Assessment**." Answers will be posted publicly to ensure fairness.

17. Appendices

Appendix A: Response Template (Recommended)

A1. Executive Summary (2–3 pages)

- Understanding of Consortium goals and context
- Summary of proposed approach and expected outcomes

A2. Methodology & Workplan

- Phases, activities, deliverables
- Stakeholder engagement plan
- Data and security approach

A3. Team & Experience

- Org chart; role matrix; bios
- Relevant case studies with outcomes and measures of success

A4. FCI Enablement

- Operating model options leveraging FCI
- Governance, decision rights, SLAs, chargeback models
- Legal/contracting pathways and HR/staffing models

A5. Financial Modeling

- Scenarios and levers; savings categories; one-time vs. ongoing
- NPV/ROI method; sensitivity analysis; risk-adjusted estimates

A6. Change Management

- Stakeholder analysis, communications plan, training approach
- Risks and mitigations

A7. Deliverables, Timeline, and Milestones

- Detailed milestone chart and acceptance criteria

A8. Pricing & Assumptions

- Base fee, options, rate card
- Key assumptions/dependencies

A9. Terms, Exceptions, and Certifications

Appendix B: Pricing Worksheet (Outline)

B1. Base Project Fee by Phase

- Phase 0: Mobilization … $[ ]
- Phase 1: Discovery … $[ ]
- Phase 2: Analysis … $[ ]
- Phase 3: Validation … $[ ]
- Phase 4: Finalization … $[ ]

B2. Optional Services

- Additional deep dive (per domain) … $[ ]
- Implementation support (monthly) … $[ ]

B3. Rate Card

- Partner/Principal … $[ ]/hr
- Senior Manager … $[ ]/hr
- Consultant … $[ ]/hr
- Analyst … $[ ]/hr

B4. Expenses Policy & Assumptions

18. Additional Guidance to Proposers

- **Right-Sizing:** FCI seeks an engagement proportional to the opportunity. Proposers should recommend a **pragmatic scope** that balances rigor and speed, clearly noting tradeoffs.
- **Transparency:** Clearly articulate assumptions and data quality considerations in the financial model; flag where ranges or confidence intervals apply.
- **Equity & Access:** Proposals should consider equity across campuses and stakeholders, accessibility standards, and support for diverse campus contexts.
- **Sustainability:** Identify opportunities aligned with sustainability goals (e.g., energy procurement, circular procurement, paperless processes).
- **Pilot-First Bias:** Favor options that enable **pilots/quick wins** that validate value and build momentum for broader adoption.

(End of RFP)