

Proposal Opening Tabulation Sheet with Disclosure

Title: RFP Number 2026-R0021 for a Marketing Automation Platform

Vendor
Concourse Tech Inc.
Creatio Americas Inc.
Element451
FSH Technologies
HubSpot Inc.
LeadSquared Inc.
Technolutions Inc.

Disclosure: Please be advised that all Proposals are not final until all are reviewed for conformance to the specifications requirements. A recommendation of award will be made to the Highest Scoring Responsive and Responsible Proposer meeting the specifications and presented to the Board of Trustees as applicable for final award.

RFP NO. 2026-R0021

MARKETING AUTOMATION PLATFORM

ADDENDUM NO. 1

JUNE 4 , 2026

.....

This addendum is being issued to update the specifications and provide additional information.

This information becomes part of the RFP Documents upon receipt. Please review and incorporate into your Proposal accordingly.

For which Proposals are scheduled to be received on Thursday, June 11, 2026, no later than 1:00 p.m., Central Time.

The signed Addendum acknowledgment is required to be returned with your Proposal no later than the due date set forth for this Request for Proposal.

Below are clarifications to this RFP:

1. ATTACHMENTS

- A. Attachment A: Vendor Questions and College's Response
- B. Attachment B: Pre-Proposal Attendee List

RFP NO. 2026-R0021

MARKETING AUTOMATION PLATFORM

ADDENDUM NO. 1

JUNE 4 , 2026

.....

This signed Addendum is required to be returned with your Proposal no later than the due date set forth for this Request for Proposal. If you have already submitted your Proposal, please submit this signed form via email to purchasing@cod.edu.

All issued addenda must be signed and returned to the College as per the instructions in the addenda or proposal will not be accepted.

You can submit this completed addendum to the Procurement Services Office by one of the means below:

1. If you have not yet submitted your proposal please sign this addendum and include with your sealed proposal.
2. If you have already submitted your proposal, please sign and return to Procurement Services via email at purchasing@cod.edu no later than the scheduled RFP deadline. We will make sure it accompanies your proposal.

You also have the option of withdrawing your proposal, if necessary.

ACKNOWLEDGEMENT:

I HAVE RECEIVED THIS ADDENDUM NO. _____

Company Name: _____
Address: _____
Authorized Signature: _____

ATTACHMENT A

VENDOR QUESTIONS AND COLLEGE'S RESPONSE

Addendum No. 1
RFP No. 2026-R0021
Marketing Automation Platform

No.	Question	Response
1	Is a CRM lite solutions a requirement in your decision criteria? Will consideration be made to marketing automation platforms who do not offer a CRM lite solution?	The CRM Lite solution is a critical part of our process, so any proposal that does not include this functionality will be not be considered.
2	Under section 3.5 of the RFP document there is mention that "the type of real-time API connection required" is not achievable on Ellucian - does Ellucian allow any type of API integration? If so, what API connection would be compatible?	No, at this time Ellucian does not provide a solution for integration.
3	Is SSO a requirement for your organization?	It is preferred but not required.
4	Please confirm the required final submission format. Is the response limited to one sealed original copy and one flash drive, or is any emailed/electronic submission also required or accepted?	Proposals must be dropped off in hard copy format prior to the RFP due date and time. Emailed and electronic submittals will not be accepted.
5	Please confirm whether all product responses should be answered inline within Tab 2 in the exact numbered order, or whether a response matrix / appendix format is acceptable so long as all items are addressed. The RFP says the proposal should be tabbed/labeled in order and that each numbered item should be addressed with supporting documentation, examples, or screenshots where applicable.	You may submit your proposal in any format you like. However, providing your information in the order requested will be the best way to assist the Evaluation Committee in understanding and evaluating your responses.
6	Please confirm whether screenshots, sample workflows, and supporting exhibits may be included in appendices, or whether they are expected directly within the body of Tab 2 responses. The RFP requests supporting documentation, screen captures, or examples where applicable.	Yes, you may include screenshots, workflows and any exhibits. In fact, we encourage you to include any type of information that will be help the Evaluation Committee thoroughly understand you offering.
7	Please clarify whether the 75 platform users / seat licenses includes any faculty, advisors, or program-chair users expected to access the CRM-lite interface. The usage table lists 75 users, while the desired future state also calls for program chair access to assigned leads and communication history.	Yes. Only about 10 seat licenses will be for the Marketing Automation platform. The remaining 65 seats are for staff and faculty who will be accessing the CRM lite.
8	Please confirm how the College would like vendors to treat pricing relative to the current annual spend. The RFP states current spend is approximately \$181,000 annually and that proposals exceeding the current total cost of ownership will not be considered. Should vendors interpret this as a strict annual cap, or as a cap on comparable annualized total cost?	Ideally, we would like to spend less - especially as we hope to go from two partners to one. The \$181,000 is the annual cost for licensing and support. For the first year, we understand that there will be implementation costs that may exceed the annual cost.
9	Please confirm whether Attachment A must be submitted strictly in the College's form layout, or whether an equivalent pricing table may be included in Tab 5 so long as all required line items are completed. The RFP points vendors to the Pricing	You may utilize another format, however, if it is not understood by the evaluation team, it could impact your score.
10	Can you describe the specific workflow you envision for program chairs managing and following up on assigned leads? As an example, if a prospective Nursing student submits an inquiry form on your website, what would you want to happen next? Would the lead automatically be assigned to the Nursing Program Chair and they received a notification? From there, would the "lead" have different stages and activities required at each step? What does the criteria look like once a "lead" reaches the end of its journey and what needs to happen with the lead info?	The first step is correct. We want a program lead immediately assigned to the appropriate chair or staff member. After that, each program has customized communication flows. Some are more automated, others more personalized by the chair. Regarless, we want the program chairs to have the ability to keep notes on their interaction, have a library of emails and texts they can utilize and personalize as well as the ability to see reports on the funnel movement of their contacts.

Addendum No. 1
RFP No. 2026-R0021
Marketing Automation Platform

No.	Question	Response
11	What does the current Ellucian file exchange process look like today, and have required import/export files already been defined?	<p>The College's current data exchange process was built specifically for Salesforce Marketing Cloud and operates as follows: the College's IT department prepares structured data files and places them on the SFMC SFTP site on a scheduled basis. Automated processes within SFMC then retrieve those files and load the data into SFMC Data Extensions, where it becomes available for segmentation and campaign use. This process is entirely inbound — data flows from Ellucian systems into SFMC — and no outbound export process from SFMC back to Ellucian systems currently exists.</p> <p>The outbound direction is more complex. The College recently transitioned Ellucian Recruit (CRM) from on-premise to SaaS, and any export process back into Recruit would require coordinated effort across the College's Enrollment Team, IT, Ellucian, and the incoming vendor. Direct export to Ellucian Colleague (SIS) is not a current objective.</p> <p>The file formats and field structures used in the current inbound process were defined for SFMC and would require remapping to meet the import specifications of a new solution. The College anticipates this is achievable with reasonable effort during implementation. For the outbound direction, the expectation is that the new platform would generate structured export files on a scheduled basis and deliver them via SFTP for loading into Ellucian systems.</p> <p>The College is seeking a vendor that can work collaboratively with our IT team during implementation to define and configure both the inbound and outbound file exchange processes. Vendors should describe their experience supporting SFTP-based data exchange and identify what resources or documentation they would require from the College to complete file mapping.</p>
12	Approximately how many active SFMC journeys, forms, and templates would need to be migrated to the new system?	We have 34 SFMC journeys that would need to be migrated to a new solution. We have three newsletter templates that would also need to be migrated. All other templates we feel maybe be easier to simply recreate originally in the new platform. We have two three RFI forms within SFMC that would need to be migrated.
13	Are there 3-5 specific reports that you can easily identify as needing at a leadership level?	A funnel report. An email effectiveness report for a single email. A lead generation report. Report telling us how many text messages were sent during a given time period. For an individual text message how many successful sends and how many replies; also if possible how many links were clicked.
14	What are the top three business outcomes that will determine whether this project is considered successful?	<ol style="list-style-type: none"> 1. Ideally we want a tool that can help us aggregate our leads and data to tell us how many leads are actually matriculating. 2. Enable our program chairs to effectively manage their leads 3. Help us more effectively communicate with our prospective and current students with customized communications that help them through the funnel and assist in retention.
15	What implementation timeline are you targeting (project kickoff to needed go-live date), and what internal resources will be assigned to the project?	<p>By December 1, we need to be able to send email and collect lead data. Our SFMC contract ends in December. We have more time to implement the texting portion as our texting contract does not end until spring 2027.</p> <p>The digital marketing team (3) will be dedicated to this implementation and we will have IT support for the file exchanges. We also have an outside partner under contract with expertise in implementations like this to support the process.</p>

END OF QUESTIONS

ATTACHMENT B
PRE-PROPOSAL ATTENDEE LIST

RESPONDENT: _____



COMMUNITY COLLEGE DISTRICT NO. 502

REQUEST FOR PROPOSAL

MARKETING AUTOMATION PLATFORM

RFP NUMBER 2026-R0021

PROPOSALS DUE: THURSDAY, JUNE 11, 2026, AT 1:00 P.M. CENTRAL TIME

In the event of College closure due to circumstance outside of the College's control, the RFP deadline will be extended to the next business day at the same time.

**RETURN BIDS TO: COLLEGE OF DUPAGE PROCUREMENT SERVICES
INSTITUTIONAL RESOURCE CENTER (IRC), ROOM 1001
425 FAWELL BLVD.
GLEN ELLYN, ILLINOIS 60137
ATTENTION: BID NO. 2026-R0021**

Issue Date:

May 19, 2026

ISSUED BY THE COLLEGE OF DUPAGE PROCUREMENT SERVICES



RFP No. 2026-R0021

Procurement Services

425 Fawell Boulevard
Glen Ellyn, Illinois 60137-6599
<http://www.cod.edu>

PHONE (630) 942-2217
FAX (630) 942-3750

May 19, 2026

REQUEST FOR PROPOSAL

Proposals for **RFP Number 2026-R0021 for a Marketing Automation Platform** will be received by the College of DuPage, District 502, between the hours of 8:00 a.m. to 5:00 p.m. Central Time at the Office of the Procurement Manager, Institutional Resource Center (IRC) Building, Room 1001, 425 Fawell Blvd., Glen Ellyn, IL 60137, until **Thursday, June 11, 2026, at 1:00 p.m. Central Time**, at which time they will be publicly opened. In the event of College closure due to inclement weather, bid deadline will be extended to the next business day at the same time.

Any bid received after the date and time stated above will be returned unopened. College of DuPage shall not be responsible for bids that are not received at the specific office location indicated above by the stated deadline. Failure by a delivery service company or person to meet the deadline will not excuse the Respondent from the deadline requirement. It is solely, the bidder's responsibility, to ensure that adequate time is allowed for timely and accurate delivery.

No response shall be withdrawn for a period of ninety (90) days after the advertised close date without the consent of the College.

Respondents may download the RFP in addition to any future addenda from the College's Procurement Service website at the following URL address: <http://cod.edu/about/purchasing/requests/index.aspx>

Under no circumstances shall failure to obtain clarifications and/or addenda relieve a Respondent from being bound by any additional terms and conditions in the clarifications and/or addenda, or from considering additional information contained therein in preparing a Proposal. Furthermore, failure to obtain any clarification and/or addendum shall not be valid grounds for a protest against award(s) made under this RFP.

LEGAL NOTICE

RFP NOTICE

No. 2026-R0021

The College of DuPage is accepting Proposals for **Marketing Automation Platform**. The RFP documents and the Zoom Meeting Instructions may be downloaded from the Procurement Services Website at: www.cod.edu/about/purchasing/requests/ by clicking on the link for this RFP and following the instructions.

Responses are due between the hours of 8:00 a.m. to 5:00 p.m. Central Time by the College of DuPage, District 502, at the Office of the Procurement Manager, Institutional Resource Center (IRC) Building, Room 1001, 425 Fawell Blvd., Glen Ellyn, IL 60137 up to and no later than **Thursday, June 11, 2026, at 1:00 p.m. Central Time** at which time the Respondents names will be read publicly.

A Pre-Proposal Conference is scheduled via Zoom for **Monday, June 1, 2026, at 10:00 a.m. Central Time**. The pre-proposal conference is not mandatory, but highly recommended.

The College of DuPage is committed to the economic development of disadvantaged business enterprises; qualified Minority, Women, and Persons with Disabilities Owned Businesses are highly encouraged to participate.

College of DuPage Board of Trustees Reserves the right to reject any and/or all responses. This invitation is issued in the name of the Board of Trustees of College of DuPage, Community College District 502, Glen Ellyn, Illinois.

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ATTACHMENT A – PRICE PROPOSAL FORM

ATTACHMENT B - CAMPUS MAP

ATTACHMENT C - SAMPLE SERVICE AGREEMENT

ATTACHMENT D - NO BID/PROPOSAL FORM

RFP SUBMISSION CHECKLIST

Things to Remember When Submitting a Proposal to the College of DuPage

1. **Read the *entire* document.** In your review, note critical items such as: blackout period, required goods and services; submittal dates, submission requirements, etc.
2. **Note the contact information provided.** The Procurement Service Department at purchasing@cod.edu is the single point of contact for this RFP and is the only contact with whom you are allowed to communicate regarding this RFP. This person is an excellent source of information for any questions you may have.
3. **Take advantage of the “question and answer” period.** Submit your questions to the Procurement Services by the deadline noted in the RFP and view the answers given in the formal addenda issued for this RFP. All addenda issued for an RFP will be emailed to each company that downloaded the RFP documents from the College website, and will include all questions asked and answered concerning the RFP. Please ensure when downloading the RFP documents, you use a valid email address.
4. **Do not alter, add to, or delete any part of the RFP documents without prior approval.** Please refer to the section titled *Exceptions* for instruction on how to request a deviation to the original RFP.
5. **Ensure all addenda are signed.** Before submitting your response, check the College Procurement Service website at <http://www.cod.edu/about/purchasing/requests/index.aspx> to see whether any addenda were issued for this RFP. If so, you must submit a signed copy of the addenda along with your Proposal response.
6. **Review and read the RFP document again to make sure you have addressed all requirements.** The copies are provided to an Evaluation Committee and will be used to score your response. **Proposals will not be accepted if documentation needing execution, signing and/or notarization in Sections 5, 6, 7, and 8, and any issued addenda are not completed. (Please note there are two (2) signature lines in Section 8 that must be signed.)**
7. **Submit your response on time.** Note the date and time listed on the front page of the Request for Proposal and be sure to submit all required items on time. Late responses will not be accepted and will be returned, unopened. Ensure the box containing your proposal is appropriately labeled. Please allow adequate time for delivery to Procurement Services..
8. **Important dates to know:**
 - Bid Publication Date – Tuesday, May 19, 2026
 - Pre-Bid Meeting – Monday, June 1, 2026, at 10:00 a.m. Central Time
 - Questions Due – Tuesday, June 2, 2026, by 12:00 p.m. Central Time
 - Bids Due – Thursday, June 11, 2026, at 1:00 p.m. Central Time
 - Target Board Approval Date – Thursday, July 17, 2026

1.0. GENERAL INFORMATION

1.1. DEFINITIONS

- A. **RESPONDENT** shall mean the individual or business entity submitting Proposal to supply any or all of the services or goods required by the Contract Documents.
- B. **RESPONSE** shall mean the RFP Documents as completed by the Respondent which constitutes the Respondent's proposal.
- C. **CONTRACT** shall mean the agreement between the College and Contractor as set forth in the resulting Contract Documents and as awarded by the College of DuPage Board of Trustees.
- D. **CONTRACTOR** shall mean the individual or business entity submitting a response and to whom the College of DuPage Board of Trustees awards the resulting Contract.
- E. **COLLEGE** shall mean the College of DuPage, Community College District No. 502, a body politic and corporate of the State of Illinois.
- F. **PROCUREMENT SERVICE MANAGER** shall mean the Procurement Service Manager of the College of DuPage.
- G. **SPECIFICATIONS** shall mean the description of the required services, Contract Goods, equipment, personnel, volume and use statistics and all requirements for the scope of work set forth in the Contract Documents.

1.2. REGULATIONS

The Contractor, or Subcontractor, warrants that they are familiar with and they shall comply with all Federal, State, and Local Laws, statutes, ordinances, rules and regulations and the orders and decrees of any courts or administrative bodies or tribunals in any manner affecting the performance of the resulting Contract, including, without limitation, Workmen's Compensation Laws, minimum salary and wage statutes and regulations, laws with respect to permits and licenses and fees in connection therewith, laws regarding maximum working hours and regulations with respect to use of explosives. No plea of misunderstanding or ignorance thereof will be considered. Whenever required, the Contractor, or Subcontractor, shall furnish the college with satisfactory proof of compliance with said Federal, State and Local Laws, statutes, ordinances, rules, regulations, orders, and decrees.

1.3. COMPLIANCE WITH LAWS - PUBLIC CONTRACTS

This solicitation will result in a contract, subject to laws and ordinances governing public contracts. The winning Respondent(s) shall at all times observe and comply with all laws, ordinances, regulations and codes of the Federal, State and other local government agencies which may in any manner affect the preparation of the response or the performance of the resulting contract. If the winning Respondent(s) observes that any of the contract documents are at variance therewith, it shall promptly notify the Procurement Service Manager in writing and necessary changes shall be effected by appropriate modification.

1.4. PROPOSAL MODIFICATIONS

Unless indicated, it is understood that proposals are in strict accordance with specification requirements. Proposals shall be deemed final, conclusive, and irrevocable. No proposal shall be subject to correction or amendment for any error or miscalculation. Proposal prices shall include cost of materials as specified, any applicable discounts and shipping.

1.5. AWARD / TERMINATION OF CONTRACT

The award of the contract will be made within ninety (90) calendar days after the opening of proposals to one or more Respondent's based on recommendation by an Evaluation Committee and pre-determined evaluation criteria and weighting, and is subject to Board of Trustee approval. The successful Respondent(s) will be notified by electronic mail that their proposal has been accepted and that they have been awarded the contract. Notification will also be posted on the College's Procurement Service website at http://www.cod.edu/about/Procurement_Service/ . Failure to execute performance as per accepted proposal may result in legal action by the College of DuPage to recover damages.

If a contract is not awarded within ninety (90) days after the opening of proposals, a Respondent may file a written request with the Procurement Service Manager for the withdrawal of their Proposal and the Procurement Service Manager will permit such withdrawal.

The College may terminate this Agreement at any time, in whole or in part, with or without cause, upon written notice to Contractor. In the event this Agreement is terminated for convenience, Contractor shall be compensated for work properly rendered through the date of termination, as can be documented to the reasonable satisfaction of the College. The College shall have no liability to Contractor beyond the date of termination. In no event shall contractor be compensated for anticipated profit or lost opportunity.

1.6. COMPETENCY OF RESPONDENT

No response will be accepted from, or contract awarded to, a Respondent that is in arrears or is in default to the College upon any debt or contract, or that is a defaulter, as surety or otherwise upon any obligation to said College or has failed to perform faithfully any previous contract with the College.

1.7. ACCEPTANCE OF PROPOSALS

The Procurement Service Manager shall notify the successful Respondent(s), in writing, of the award of the contract by the College within ninety (90) days from the proposal opening date. Upon receipt of the Notice of Award, the Contractor shall promptly secure, execute and deliver to the Procurement Service Manager any documents required herein.

1.8. PAYMENT TERMS

All invoices must be provided to the College for services rendered directly to the College. Undisputed invoices will be paid to the contractor within sixty (60) days of receipt of properly submitted invoices, in accordance with the Local Government Prompt Payment Act.

1.9. PAYMENT REMITTANCE

All College vendors are required to receive payment from the College via an Automated Clearing House (ACH) transfer. Instructions to register for ACH payments will be sent, upon request, to successful Respondents. Failure to comply with the ACH requirements may result in termination of the contract or purchase order. College ACH transfers typically occur the third week of each month. Invoices must be received at least 3 weeks prior to each ACH payment release. You are strongly encouraged to set up your account upon notice of award to avoid a delayed payment.

1.10. TAX EXEMPTION

College of DuPage District #502 is exempt from Federal, State and Municipal taxes. Exemption certificates will be furnished upon request.

1.11. CASH BILLING DISCOUNTS

Cash billing or percentage discounts for payment will not be considered in evaluating Proposals.

1.12. EQUAL EMPLOYMENT OPPORTUNITY

In the hiring of employees for the performance of work under the resulting contract and any subcontract thereunder, no Contractor or Subcontractor shall, by reason of race, color, sex, religion, national origin, ancestry, age, marital status, disability, unfavorable military discharge or sexual orientation discriminate against any citizen of the United States, in the employment of Labor or workers, who are qualified and available to perform work to which the employment is related. Neither shall any Contractor or Subcontractor, or any person on behalf of either, discriminate against or intimidate any employee hired for the performance of work under this contract on account of race, color, sex, religion, national origin, ancestry, age, marital status, disability, unfavorable military discharge or sexual orientation.

1.13. HOLD HARMLESS CLAUSE

Contractor shall indemnify, hold harmless and defend the College of DuPage, its officers, trustees, agents, servants, and employees, from and against any and all claims, lawsuits, demands, liabilities, and losses whatsoever occurring or resulting to any and all persons, firms or corporations furnishing or supplying work, services, materials, or supplies in connection with the performance of this agreement, and from any and all claims, liabilities, and losses occurring or resulting to any person, firm, or corporation for damage, injury, or death arising out of or connected with Contractor’s performance of this agreement, unless such claims, liabilities, or losses arise out of the sole negligence or willful misconduct of the College of DuPage.

“Contractor’s performance” includes Contractor’s action or inaction and the action or inaction of Contractor’s officers, employees, agents and Subcontractors.

1.14. LIABILITY INSURANCE

The Respondent shall not commence work under this contract until all insurance required herein is obtained and approved by the College. Nor shall the Respondent allow any subcontractor to commence work until all similar insurance required of the subcontractor has been so obtained.

The Respondent shall furnish the College of DuPage with a Certificate of Insurance, with College of DuPage, its trustees, officers, agents, employees, and any other parties designated by COD named as an additional insured for Commercial General and Automobile Liability, showing the minimum coverage indicated below. Insurance companies must have a Best Rating of at least A VI and otherwise be acceptable to the College. Worker’s compensation insurance shall include a waiver of subrogation in favor of the College of DuPage. The College will also be shown as the certificate holder. Further, the Certificate of Insurance shall state that coverage provided is primary to any other coverage available to College of DuPage. An endorsement page showing coverage must accompany the certificate of insurance. The foregoing certificate shall contain a provision that coverage afforded under the policies will not be cancelled or non-renewed until at least sixty (60) days prior written notice has been given to College of DuPage.

TYPE OF INSURANCE

MINIMUM INSURANCE COVERAGE

Combined Single Limit per Occurrence/Aggregate

Commercial General Liability including:

- 1. Premises – Operations
- 2. Explosion, Underground and Collapse Hazard
- 3. Products/Completed Operations
- 4. Contractual Insurance
- 5. Broad Form Property Damage
- 6. Independent Contractors
- 7. Bodily Injury

\$1,000,000 / \$2,000,000

Automobile Liability

Owned, Non-owned, or Rented

\$1,000,000 / \$2,000,000

Workers' Compensation and Employer's Liability

As Required by Applicable Laws.

Professional Liability

If Performance Specifications are required by the Contract

1.15. BUSINESS ENTERPRISE PROGRAM

The College of DuPage encourages the participation of qualified minorities, females, and persons with disabilities owned businesses in public contracts. It is the practice of the College to ensure full and equitable economic opportunities to persons and businesses that compete for business with the College of DuPage, including minorities, females, and persons with disabilities owned business enterprises. The College is committed to the economic development of disadvantaged business enterprises and the award of contracts to businesses owned by minorities, females, and persons with disabilities for services to the extent provided by the Business Enterprise for Minorities, Females and Persons with Disabilities Act ("Act"), 30 ILCS 575.

This solicitation contains an Aspirational goal of 20% to include businesses owned and controlled by minorities, females and persons with disabilities in the procurement and contracting/subcontracting processes.

END OF SECTION

2.0 INSTRUCTIONS TO RESPONDENTS

2.1. OUTSIDE DOCUMENT DISCLAIMER

The College of DuPage cannot warrant, represent, or guarantee the accuracy or completeness of documents which have not been obtained directly from the College. If you have obtained these documents from a third-party source, the College is not responsible for any loss or damage including, but not limited to, time, money, or goodwill arising from errors, inaccuracies or omissions in any third party documents.

To obtain official documents, please visit: <https://www.cod.edu/about/purchasing/requests/index.aspx> . Click on the link for this solicitation and follow the prompts to enter your information onto our vendor list and download the original documents. This will ensure your contact information is registered on our vendor list, and we can send you any addenda that may be issued. This website is the only official website for prospective Respondents to obtain digital copies of RFP documents. It is the responsibility of each prospective Respondent to verify the completeness of their printed RFP documents before submitting a response and accompanying executed addenda acknowledgement, and other required forms.

2.2. BLACKOUT PERIOD

Under no circumstances are respondents to contact or discuss this Request for Proposal, or any of the information contained herein or about this solicitation in general, with any College of DuPage trustee, employee, vendor, contractor or subcontractor, other than using the methods outlined in this RFP. Respondents are strictly forbidden from visiting the College's locations or approaching any College trustee, employee, vendor, contractor or subcontractor for any information related to this RFP or this solicitation without the direct knowledge and authorization in writing in advance from the Procurement Service Manager or Buyer. Violation of these provisions may subject the respondent to immediate disqualification.

2.3. PRE-PROPOSAL CONFERENCE

The College will hold a Zoom Pre-Proposal Conference on **Monday, June 1, 2026, at 10:00 a.m. Central Time**. The Pre-Proposal Conference is not mandatory, but highly recommended.

Zoom Invite Meeting Information for Pre-Proposal Conference

Topic: Pre-Proposal Conference for 2026-R0021 for Marketing Automation Platform
Time: Monday, June 1, 2026, at 10:00 a.m. Central Tim (US and Canada)

Join Zoom Meeting: <https://cod.zoom.us/j/4032153786>

Meeting ID: 403 215 3786

One tap mobile
+13126266799,,4032153786# US (Chicago)

Dial by your location
+1 301 715 8592 US (Washington DC)
+1 646 558 8656 US (New York)
+1 669 900 6833 US (San Jose)

Meeting ID: 403 215 3786

Find your local number: <https://cod.zoom.us/u/kb8Pu8UUch>

2.4. REQUESTS FOR INFORMATION/CLARIFICATION

Respondents must communicate only with Procurement Services. If any firm submitting a response for this solicitation is in doubt as to the true meaning of the specifications or other documents or any part thereof, Respondent shall request clarification from Procurement Services. Questions must be submitted in writing and be directed via email to Procurement Services at purchasing@cod.edu no later than **Tuesday, June 2, 2026, by 12:00 p.m. Central Time**. Questions for which answers are provided will be communicated to all registered recipients of RFP documents via addendum.

2.5. PROPOSAL DEADLINE AND SUBMISSION

To be assured of consideration, Proposals must be received Monday through Thursday between the hours of 8:00 a.m. to 5:00 p.m. Central Time by the College of DuPage Procurement Services in the Institutional Resource Center (IRC) Building, Room 1001, 425 Fawell Blvd., Glen Ellyn, IL 60137, no later than Thursday, June 11, 2026, at 1:00 p.m. Central Time. Failure by a delivery service company or person to meet the deadline will not excuse the Proposer from the deadline requirement. It is solely the Proposer's responsibility to ensure that adequate time is allowed for timely, accurate delivery and that the proposal is received as required. See Attachment B for the location of the Institutional Resource Center (IRC) Building. **Note: The College will be closed on Fridays during the summer. Proposals will not be accepted on Fridays.**

All Proposers shall submit one (1) sealed original copy and one (1) flash drive containing all completed documents of the RFP.

Proposals must be in a sealed envelope and delivered to:

**College of DuPage Procurement Services
Institutional Resource Center (IRC) Building, Room 1001
425 Fawell Blvd.
Glen Ellyn, Illinois 60137
Attention: RFP No. 2026-R0021**

Proposals must be received by the date and time of the RFP Opening as shown in the legal advertisement. The sealed envelope submitted by the Proposer shall carry the following information on the face of the envelope: Proposer's name, address, RFP Notice Number, advertised date of RFP Opening and the hour designated for RFP Opening as shown in the legal advertisement. Unless otherwise stated, all blank spaces on the bid forms shall be fully completed. Bidder bears all responsibility for error or omissions in the submission of the Bid.

2.6. EXCEPTIONS

If any Respondent intends to take any deviations or exceptions from the specifications or other RFP documents, Respondent shall submit to the Procurement Service Manager a written request for a deviation or exception. If the Procurement Service Manager considers such deviation or exception acceptable, the Procurement Service Manager shall issue an Addendum setting forth such deviation or exception from the specifications or other which shall be applicable to all Respondents submitting a response.

If no Addendum is issued by the Procurement Service Manager, then such deviation or exception shall be deemed rejected. The College may reject any response containing deviations or exceptions not previously accepted through a written Addendum.

A copy of such Addendum will be e-mailed or delivered to each Respondent receiving a set of such RFP Documents. Respondent shall acknowledge receipt of each Addendum issued in the space provided on the RFP form or via a signed addendum. Failure to acknowledge receipt of addenda will result in disqualification of the Proposal.

All requests for deviations or exceptions must be sent in writing to purchasing@cod.edu at least ten (10) days prior to the date and time set forth as the RFP Due Date. The College shall not be responsible for nor bound by any oral instructions, interpretations, or explanations issued by the College or any of its representatives.

2.7. ERROR IN PROPOSAL

Where a Respondent claims to have made a mistake, such mistake must be called to the attention of the Procurement Service Manager within twenty-four (24) hours after the opening of responses. Within forty-eight (48) hours of the advertised RFP deadline, Respondent shall submit to the College's designated Procurement Service Manager original documentary evidence and a detailed explanation of how the mistake was made. Failure to conform to this requirement precludes the Respondent from withdrawing its response based upon a mistake. If such notice, proof and explanations have been tendered, and the Procurement Service Manager is convinced that a bona fide mistake has been made, the Procurement Service Manager may recommend to the Board of Trustees that the Respondent be allowed to withdraw its response and recommend that the contract be awarded to the next responsible, responsive Respondent. If the Board determines by majority vote, that the Respondent has made a bona fide error, no award will be made upon such response.

2.8. WITHDRAWAL OF PROPOSALS

Respondents may withdraw their responses at any time prior to the time specified in the legal advertisement as the date and hour set for the RFP Opening. However, no Respondent shall withdraw, cancel or modify its response for a period of ninety (90) calendar days after said advertised RFP Opening. Requests for withdrawal must be made in writing on the Respondent's letterhead to the College's Procurement Services. Respondents must make their own arrangements for the return of their Proposals.

2.9. NOTICES

All communications are to be directed to Procurement Services via email at purchasing@cod.edu.

2.10. CONFIDENTIALITY

The Procurement Services shall examine the responses to determine the validity of any written requests for nondisclosure of trade secrets and other proprietary data identified. After award of the contract, all responses, documents, and materials submitted by the Respondent pertaining to this RFP will be considered public information and will be made available for inspection, unless otherwise determined by the Procurement Services Department. All data, documentation and innovations developed as a result of these contractual services shall become the property of the College. Based upon the public nature of these RFPs, a Respondent must inform the College, in writing, of the exact materials in the offer which cannot be made a part of the public record in accordance with the Illinois Freedom of Information Act. It is not acceptable for a proposal to be marked "proprietary" in its entirety.

2.11. RESPONDENT WARRANTIES

The submission of a Proposal shall constitute a warranty that: (i) Respondent has carefully and thoroughly reviewed the RFP Documents and has found them complete and free from ambiguities and sufficient to describe the Contract work; (ii) Respondent and all workers and/or employees it intends to use in the performance of this contract are skilled and experienced in the type of work or services called for by the RFP Documents; and (iii) neither the Respondent nor any of its employees, agents, suppliers or subcontractors have relied on any verbal representations from the College, or any of the College's employees, agents, or consultants, in preparing the Proposal.

2.12. CONSIDERATION OF RESPONSES

The College reserves the right to reject or accept any or all Proposals, to extend the response period, to waive technicalities in the RFP Documents and/or to direct that the solicitation be abandoned or re-issued prior to award of the contract.

The Respondent acknowledges the right of the College to reject any or all proposal and to waive any informality or irregularity in any proposal received. In addition, the Respondent recognizes the right of the College to reject a proposal if the Respondent failed to submit the data required by the Request for Proposal documents, or if the proposal is in any way incomplete or irregular.

END OF SECTION

3.0 SCOPE OF SOLUTION FOR RFP NO. 2026-R0021 FOR A MARKETING AUTOMATION PLATFORM

3.1 INTRODUCTION AND BACKGROUND

The College of DuPage (hereinafter “the College”) is issuing this Request for Proposals (RFP) to identify a qualified vendor to provide a comprehensive marketing automation platform supporting student recruitment, engagement, and communications across multiple channels.

The College currently operates Salesforce Marketing Cloud (SFMC) and is migrating to a new platform. The College’s Student Information System and Student CRM are Ellucian products. A direct API connection to external marketing platforms is not supported; all data exchange with College systems will be conducted via CSV/Excel file import, SFTP, or monitored file-drop processes.

3.2 CURRENT USAGE AND VOLUME

Vendors should use the following metrics to ensure their proposed platform and pricing can support the College’s current operational scale. These figures should inform all aspects of the vendor’s proposal, including licensing model, performance specifications, and cost proposal.

Metric	Current Volume
Emails sent annually	1,812,124
SMS/text messages sent annually	851,963
Platform users / seat licenses needed	75
Number of Contacts (Across 2 SFMC Business Units)	715,164

Note: The College maintains separate business units for prospective students, current students/community members, and Continuing Education. The platform must support distinct segmentation and communication management across all units simultaneously.

3.3 CONTRACT TERM

The initial contract term will be three (3) years with an option to renew for two (2) additional one-year periods, subject to College approval and satisfactory performance by the vendor.

3.4 MINIMUM VENDOR QUALIFICATIONS

Vendors must meet the following minimum qualifications to be considered:

- Demonstrated experience serving higher education institutions, preferably community colleges
- Active customer base with verifiable references
- Platform must support file-based data exchange (CSV/Excel/SFTP) as the primary integration method
- Full compliance with FERPA, TCPA, CAN-SPAM, and CASL

3.5 CURRENT STATE

The College of DuPage Marketing Department currently operates two separate platforms to support student recruitment communications. Email automation is managed through Salesforce Marketing Cloud (SFMC), and SMS text messaging is handled through Modern Campus Message (MCM). The College does not utilize SFMC's native texting capability, as it is not cost-effective at the College's messaging volume. Combined, the College spends approximately \$181,000 annually on these two platforms — approximately \$118,000 for SFMC and \$63,000 for MCM.

The original decision to contract with Salesforce Marketing Cloud was made with the expectation that live, bidirectional data integration would be established between SFMC and the College's two core student systems: Ellucian Recruit (the Student CRM) and Ellucian Colleague (the Student Information System). That integration has not been achievable. The limitation is on the Ellucian platform side, which does not support the type of real-time API connection required. As a result, the College has been operating SFMC largely in isolation from its student data systems, significantly limiting the platform's effectiveness and return on investment.

In the absence of system integration, the Marketing Department currently distributes lead information to academic program chairs and the Admissions Department manually, via Excel spreadsheets exported from SFMC. There is no mechanism to track whether or how program chairs follow up with prospective students. Program chairs do not have access to Ellucian Recruit, and lead data is not imported into the CRM in a way that would allow follow-up activity to be recorded or monitored. This creates a gap in the recruitment funnel where lead handoff occurs but outcomes cannot be measured.

Beyond recruitment, the Marketing Department also relies heavily on SFMC to communicate with currently enrolled students. This includes transactional communications, event notifications, program updates, and engagement campaigns designed to keep students connected to the College throughout their academic journey. As the College looks to its future state, it seeks to evolve these communications beyond marketing and into student success — using the platform to deliver timely, personalized outreach that supports students in navigating their academic progress, completing enrollment milestones, and ultimately achieving their educational goals.

3.6 DESIRED FUTURE STATE

The College is seeking a unified Marketing Automation System that addresses these limitations and supports a more connected, measurable recruitment and student success operation. The desired future state has five core components:

Centralized Lead Management. All prospective student inquiries — whether generated through web-based Request for Information (RFI) forms, paid advertising platforms, or other lead sources — flow directly and automatically into the Marketing Automation System. Lead records are created, deduplicated, and maintained within a single system of record for the Marketing Department.

Program Chair CRM Access. Academic program chairs are provided access to a CRM-lite interface within the Marketing Automation System. Through this interface, program chairs can view leads assigned to their programs, log their outreach activity (calls, emails, and meetings), and see the full communication history for each prospect, including Marketing Department messages and web activity. This eliminates the current manual spreadsheet handoff and enables the Marketing Department to report on program chair engagement to academic leadership.

Automated SFTP Data Exchange with Ellucian Systems. While real-time API integration with Ellucian Recruit and Ellucian Colleague remains unavailable, the desired future state establishes automated, scheduled data exchange via SFTP. Standardized data reports are generated on a defined schedule and delivered via SFTP to Ellucian Recruit (CRM) and Ellucian Colleague (SIS), ensuring that lead and enrollment activity is reflected in the College’s official student records systems. Conversely, data reports from Ellucian systems are delivered via SFTP into the Marketing Automation System on a scheduled basis, keeping contact records current with enrollment status changes.

Student Success Communications. The new platform must support not only prospective student recruitment but the full continuum of student engagement. The Marketing Department intends to use the system to deliver proactive, personalized communications to enrolled students that support academic progress and degree completion — including milestone reminders, registration prompts, support service referrals, and re-engagement campaigns for students showing early indicators of attrition.

Consolidated Platform Within Existing Budget. By replacing SFMC and MCM with a single integrated platform that handles both email and SMS, the College aims to reduce operational complexity and consolidate vendor relationships. The College’s total current expenditure across both platforms is approximately \$181,000 annually. Proposals that exceed this total cost of ownership will not be considered.

3.7 EVALUATION CRITERIA

Proposals will be evaluated on the following criteria:

CRITERIA	WEIGHT
Product specifications and metrics	35%
Detailed plan for implementation, training and ongoing support	25%
Vendor’s experience in higher education and quality of references	10%
Cost Proposal	25%
Proposer’s demonstrated Commitment to Diversity/State of Illinois Business Enterprise Program (BEP)	5%
Total	100%

END OF SECTION

4.0 PROPOSAL SUBMISSION AND EVALUATION

4.1. PROPOSAL CONTENT AND FORMAT

The sections in the proposal should be tabbed or clearly labeled in the order shown below:

Tab 1: Transmittal Letter and Required Forms

- A. Transmittal Letter - signed by an individual authorized to legally bind the Respondent. The cover letter should contain the name of the firm, address, and the contact information for individual(s) authorized to answer technical, price, and contract questions. Contact information should include telephone number, fax number, mailing address, and email address. The cover letter must be signed by a person or persons authorized to bind the proposer(s). The cover letter must indicate whether any exceptions to specifications have been taken and reference the location in the proposal where these exceptions are detailed.
- B. Section 5.0 – BEP Utilization Plan.
The College of DuPage encourages the participation of qualified minorities, females, and persons with disabilities owned businesses in public contracts and commits to the economic development of disadvantaged business enterprises and the award of contracts to businesses owned by minorities, females, and persons with disabilities for services to the extent provided by the Business Enterprise for Minorities, Females and Persons with Disabilities Act (“Act”), 30 ILCS 575. This solicitation contains an aspirational goal of 30% to include businesses owned and controlled by minorities, females and persons with disabilities in the procurement and contracting/subcontracting processes. Commitment to diversity considerations may include:
 - i. Business Enterprise Program (BEP) certification or utilization that meets or exceeds the college’s 30% goal.
 - ii. Assistance to BEP firms in obtaining lines of credit, insurance, equipment, supplies, or related services.
 - iii. Percentage of prior year revenues for projects that incorporate the involvement of BEP firms.
 - iv. Existence of a written supplier diversity plan or training/mentoring program for BEP firms.
 - v. Percentage of members serving the firm’s governing board, senior executive, and managers who are women, minorities, or persons with a disability.
- C. Section 6.0 - Certifications Page
- D. Section 7.0 - Signature Page
- E. Section 8.0 - Conflict of Interest Disclosure and Non-Collusion Form
- F. Any issued addenda, signed (if applicable)

Tab 2: Product Specifications and Metrics

Vendors should clearly describe how their platform meets the functional requirements outlined in this RFP. For each numbered item, address all elements of the question and provide supporting documentation, screen captures, or examples where applicable.

A. General Platform Requirements

1. Contact Management and Data Architecture

- a) How does your system assign a unique identifier? During the recruiting process the prospective student uses a personal email address; after completing the enrollment application they are assigned a @dupage.edu address, requiring a shift in unique identifiers. Describe your system's approach.
- b) Can your system create a parent-child relationship between two or more contacts? Our Continuing Education department registers minors through their parents but needs the minor's information as well. Describe your capabilities.
- c) Can your system create separate units or divisions? The College currently keeps prospective students separate from current students and community members. Describe your capabilities.
- d) Describe the opt-in and opt-out process for your system. Can an opt-out be overridden for transactional communications?
- e) Does your system allow a contact to manage their opt-in preferences across multiple communication channels (email, text, direct mail, phone, etc.)?
- f) Does your system provide a calendar for tracking communications both future and historical? Describe the full calendaring functionality.
- g) Describe how your system identifies duplicate records and the process to merge them.
- h) Does your system easily identify and display contacts that are unsubscribed, marketing suspended, blacklisted, or have a bounced address?
- i) Describe how easily the College can add new data fields, including custom fields.

2. Campaign and Workflow Management

- a) Describe your system's interface for campaign workflow creation and editing.
- b) Does your system provide a comprehensive view of every interaction a contact has had with our brand online, including website clicks and social media interactions? Describe how this is displayed.
- c) Does your system offer the ability to alert another department to take action or initiate a communication regarding a student or prospect via email or other trigger?
- d) Can direct mail sent to contacts be tracked within your system? Describe how this is accomplished.

- e) Does your system include editable templates (email, landing page, forms, etc.) that can be fully branded to the College's identity?
- f) Describe the search functionality within your system.
- g) Describe the mobile capabilities of the platform.
- h) The College has a three-person marketing team without dedicated technical staff. Describe how a non-technical marketer can independently manage day-to-day campaign operations, data imports, and reporting without requiring developer support or third-party consulting.

3. Access, Roles, and Compliance

- a) How does your platform handle personally identifiable information (PII)? How would you support the College's business use of PII and compliance with applicable regulations?
- b) Describe the levels of access within the system and how roles are assigned and managed for staff.
- c) Does your system support a lightweight user role (e.g., faculty advisor) who can receive and view assigned leads without requiring full system access?
- d) Can leads be automatically routed to a faculty member or staff advisor based on criteria such as program of interest, geography, or student type?
- e) Can faculty or advisors log their interactions with prospects (calls, emails, meetings) within the system, including via a simplified mobile interface?
- f) Can administrators generate reports showing faculty or advisor activity — including contacts made, leads responded to, and time-to-first-contact — for reporting to department leadership?
- g) Can the system send automated alerts to faculty or advisors when a new lead is assigned or when a prospect takes a key action such as visiting a program page or scheduling a visit?
- h) Does your platform have pre-built enrollment funnel stages (e.g., Inquiry, Prospect, Applicant, Admitted, Enrolled)?
- i) Does your system support FERPA compliance workflows? How do you handle student records and PII in the context of FERPA?
- j) Does your platform maintain an audit log of all data access and communications for compliance review?
- k) Does your platform have experience supporting institutions using Ellucian student information and CRM systems? Does your team have experience with file-based data exchange from Ellucian systems?
- l) Do you have a higher education-specific customer success team? Can you provide references from community colleges specifically?

B. Email

1. Describe the ease of creating templates and emails within the solution.
2. Describe the ability to create folders to keep emails organized by department.
3. Does your system support tracking of two or more email addresses for a single contact, with the ability to designate a primary and secondary address?
4. Can email addresses be changed easily?
5. Does your system support HTML import for email creation?
6. Describe the email personalization capabilities of your system.
7. Do emails support rule-based dynamic content and personalization, with alternative text blocks selected by rules that evaluate associated data?
8. Does your system support sending attachments with an email?
9. Are email templates mobile-optimized and web-responsive by default?
10. Does your system support A/B testing by selecting random samples to compare email versions? Can the platform automatically select and send the winning version, and what metrics determine the winner?
11. Describe your pre-send email testing capabilities exclusive of A/B testing (e.g., spam testing, rendering previews across clients and devices).
12. Can users preview emails prior to sending?
13. Describe the approval workflow for testing and sending emails.
14. Does your system support the ability to pause and restart scheduled campaigns, or make changes after activation?
15. Can recipient lists and suppression lists be built from within the email tool based on characteristics in the data set?
16. Can the platform handle both marketing emails and operational/transactional emails?
17. How does your platform handle hard and soft email bounces?
18. Does your system provide deliverability support and deliverability metrics? Describe the capabilities.
19. Describe the spell-check capabilities of your system.
20. Do you support the use and tracking of video content in emails?
21. Can email templates be restricted by team or department?

C. Text Messaging (SMS)

1. Does your system provide a hard stop for text messaging once a message has begun to send? Describe the process.
2. Describe the capabilities of your system to create automated text messages and automated responses.
3. Can your system incorporate an SMS text message step into a cross-channel or omni-channel campaign workflow?
4. Will your system support an SMS-only campaign?
5. Can SMS messages be personalized with data stored in the contact record?
6. Can SMS messages be triggered based on data stored in the contact record?
7. Can SMS messages or app notifications be sent in real time? Describe the timeframes for sending.
8. Does your system support sending SMS messages within specified time windows (e.g., no messages before 8 a.m. or after 10 p.m.)?
9. Does your platform perform SMS delivery directly or through a third party? If through a third party, identify the provider.
10. Can individual SMS phone numbers be assigned to Admissions Recruiters or other staff so prospects can text them directly?
11. Does your system support both one-to-one texting and broadcast texting?
12. Is SMS messaging priced per message, per contact, or bundled into the platform license? What are the overage costs if the College exceeds a defined volume threshold?
13. Does the platform support frequency capping at the individual contact level to prevent over-communication across email and SMS channels?
14. Does the platform provide sending alerts or automated hard stops when a campaign exceeds a defined volume or frequency threshold?

D. Lead Generation

1. Describe your system's overall ability to integrate with paid media channels.
2. Describe the platform's ability to acquire leads from various paid media sources and agencies.
3. Does your platform support integration with Google Ads and/or Google Analytics?
4. Do you have a URL shortener built into the platform?
5. Is it possible to clone an entire marketing campaign (including emails, text messages, landing pages, links, and segments) intact?

6. Can campaigns be triggered by a contact's engagement with specific content?
7. Describe your system's ability to track cookie IDs, Social IDs, and similar identifiers.
8. Can the system capture and store UTM parameters (source, medium, campaign, content, term) on every lead record at the point of acquisition?
9. Can UTM parameter data be used in segmentation rules, reporting filters, and automated workflow triggers?
10. Does the platform provide a source-to-enrollment funnel report showing cost-per-lead and cost-per-enrollment by advertising channel?
11. Can the system integrate natively with paid social media lead generation forms (e.g., Facebook and Instagram lead ads)?

E. Landing Pages and Forms

1. Describe the process to create and customize landing pages within your system.
2. Comment on the ease of setting up landing pages and forms and how they are integrated into a website.
3. Does the landing page creator have a drag-and-drop interface, or must pages fit into predefined templates?
4. Does the landing page creator support HTML import and editing?
5. Does your WYSIWYG landing page editor include a spell-check tool?
6. Can landing pages be shared across multiple campaigns?
7. Does your system support personalized content blocks on a landing page (text, images, custom fields, calls to action) based on behavioral and demographic segmentation, without requiring code manipulation?
8. Does your form builder allow export of form code for embedding into external web pages such as the College's main website?
9. Does your form builder support custom formatting so the College can control the look and feel of forms?
10. Does your system support easy setup of A/B testing for two or more landing page versions?
11. Can forms use progressive profiling to gather additional information from known contacts to help complete their lead record?
12. Can the system populate a hidden form field based on a URL parameter or cookie without custom code (e.g., passing lead traffic source from the URL to the hidden field)?
13. Does the system deduplicate leads submitted via forms? Describe the process.

14. How do your forms handle multiple submissions from the same contact? Can a full history of all submissions be stored or displayed?
15. Can landing pages be previewed before deployment?
16. Does your system support the use and tracking of video content on landing pages?
17. Can landing pages be personalized when a known contact visits?

F. Digital Assets and Data Integration

1. Digital Asset Management

- a) What file types can be stored within the system for frequent access (logos, images, video, etc.)?
- b) Can the College use its own file naming conventions when saving image and asset files?
- c) Can asset files be organized into folders with searchable naming conventions for quick access?
- d) Can images be edited directly within the platform (crop, resize, overlay text, apply filters, etc.)?
- e) Does your platform support import from a separate Digital Asset Management (DAM) system? The College currently uses PhotoShelter. Does your platform integrate with PhotoShelter?

2. Data Integration

- a) What tools and technologies do you use to accomplish data integration?
- b) Does your system support scheduled or on-demand bulk import of CSV/Excel files? Can this process be automated via SFTP or a monitored file-drop location?
- c) What is the field mapping process when importing data from external files? Can mapping templates be saved and reused across recurring imports?
- d) How does the system handle record matching and deduplication during import when a unique identifier may shift (e.g., a prospect's personal email transitioning to a @dupage.edu address upon enrollment)?
- e) Can the system trigger automated workflows upon successful completion of a data import?
- f) What happens to records that fail validation during an import? Are errors logged in a reviewable report, and can partial imports complete with failed records held for correction?
- g) Describe the full experience a non-technical user would have managing a recurring SFTP import — from initial file receipt through record update through error resolution — without involvement from IT staff.

- h) Describe the complete process for moving data into the system via file-based import. What file formats are supported, what steps does the user take, and what confirmation or audit trail is generated upon completion?
- i) What built-in deduplication logic runs on every import? Describe what the user interface looks like when record conflicts or import errors are flagged — including how the user is notified, what information is presented, and how conflicts are resolved.

G. Scheduling, AI, and Reporting

1. Scheduling and Appointment Management

- a) Does your system include native appointment scheduling functionality for campus visits, advisor meetings, and information sessions?
- b) Does your platform support integration with third-party scheduling tools such as Calendly? Can scheduled appointments be written back to the contact record and used to trigger automated workflows?
- c) Does your platform support calendar synchronization with Microsoft Outlook or Microsoft Exchange, with bidirectional availability sync so scheduling reflects real-time staff availability?
- d) Can prospects self-schedule appointments directly from within an email or landing page without leaving the marketing platform?
- e) Are appointment reminder messages (email and/or SMS) automated and tied to the contact record and the scheduled event?

2. Artificial Intelligence and Predictive Analytics

- a) Does your platform include AI-powered lead scoring? Describe the model inputs, how scores are calculated, and how they are surfaced to users within the system.
- b) Can your system use AI to recommend the optimal send time or communication channel for individual contacts based on prior engagement data?
- c) Does your platform offer predictive enrollment likelihood scoring to identify which prospects are most likely to apply or enroll? Describe the methodology and how predictions integrate with campaign workflows.
- d) Can your system ingest multi-source advertising data (paid search, paid social, programmatic display, direct mail) and apply AI or attribution modeling to identify which sources drive enrollment outcomes — beyond clicks or leads?
- e) Does your system support multi-touch attribution modeling? Can it compare first-touch, last-touch, and linear attribution within the same reporting environment?
- f) Can AI surface anomalies or trends in your data automatically (e.g., a statistically significant drop in email open rates from a specific lead source, or a shift in enrollment funnel conversion)?
- g) Given that the College's data exchange with its Student Information System is file-based and not real-time, describe how your AI and predictive features perform in this environment. Which features require real-time data connections to function effectively, and which are designed to operate on scheduled batch data?

3. System Metrics and Reporting

- a) Describe your approach to reporting for users, managers, and administrators.
- b) Can any user with permissions run reports, or only system administrators?
- c) Does your system allow supervisors and administrators to run performance reports such as number of outreach completed, number of appointments scheduled, etc.?
- d) Are built-in reports and report templates available? If so, list the most commonly used reports.
- e) Are there built-in dashboards or metrics providing at-a-glance real-time insight into system and user activity?
- f) Can key users create and save customized ad hoc reports through the user interface to review student populations (demographics, GPA breakdown, enrollment status, program enrollment, caseloads)?
- g) Is training necessary to create reports?
- h) Can reports be automated to send to a specified group of recipients on a recurring basis by email?
- i) Can dashboards and reports be shared with non-users of the application (e.g., administrators and senior leadership)?
- j) What options do you provide for report format and delivery? Can reports be downloaded as PowerPoint, Excel, or PDF?
- k) Will your platform enable the College to identify which campaigns and content are most effective, which are trending at specific times, and which programs are working within fine segments?
- l) Describe how your system measures and displays progression from marketing prospects to enrollments.
- m) Can basic reports be filtered by a custom segment (e.g., email performance for Traditional Undergrad prospects only, or leads aged 24 and over)?
- n) Can the College track and report on direct mail or other communications delivered outside the system to contacts within the database?

H. Migration from Salesforce Marketing Cloud

The College is currently operating on Salesforce Marketing Cloud (SFMC) and will be migrating to the new platform upon contract award. Vendors must describe their experience with SFMC migrations and their recommended approach for transitioning the College's existing data, campaigns, and assets.

1. Describe your organization's experience migrating clients from Salesforce Marketing Cloud. How many SFMC migrations has your team completed, and can you provide references from institutions that have made this transition?

2. What data can be migrated from SFMC to your platform? Specifically address: contact records and attributes, communication history (sent emails, SMS, engagement data), email and SMS templates, campaign and journey/workflow definitions, suppression lists, and reporting data.
3. What data cannot be migrated, or is typically left behind in an SFMC-to-new-platform transition? How do you recommend the College handle these gaps?
4. Provide a proposed migration timeline with key milestones. At a minimum, include: kickoff and discovery, data audit and mapping, data migration and validation, template and campaign rebuild or import, parallel operation/testing period, and go-live.
5. Does your organization provide migration services directly, or is this managed by a third-party implementation partner? If a partner, identify the firm and describe their qualifications.
6. How do you recommend the College handle the period of parallel operation, when both SFMC and the new platform may need to be active simultaneously?
7. What is the College's role in the migration process? What staff time, access, and resources will be required from our team?
8. Are migration services included in your implementation cost, or are they priced separately? Please itemize any migration-specific costs in your cost proposal.
9. What is your quality assurance process for validating migrated data prior to go-live? How do you ensure contact records, opt-out statuses, and engagement history are accurately transferred?

I. Hosting, Security, and Compliance

1. If hosted, where are your data centers located? Who owns them?
2. What preventative infrastructure, policy, monitoring, and security controls are in place at the data centers?
3. What security measures govern the transmission of data from end users to the application?
4. Describe your access and authorization processes, and how your system supports single sign-on authentication.
5. Describe how your system implements role-based security and access permissions.
6. Does your system support templates for assigning privileges based on user role?
7. Have you ever had a security breach? If yes, describe the incident and remediation steps taken.
8. Describe how you communicate unexpected system interruptions and planned downtime to clients.
9. How does your system enforce TCPA compliance for SMS communications, including prior written consent documentation and opt-out management?

10. Does your system support automated CAN-SPAM and CASL compliance for email communications?
11. How does your system handle FERPA-governed student records, particularly in scenarios where faculty, advisors, or other non-administrative users have access to prospect or student data?

Tab 3: Implementation and Support

In this section, describe the implementation process and training support you will provide.

A. Implementation

1. What is the typical implementation timeframe to reach go-live? Provide a high-level milestone timeline.
2. Describe the team the College should allocate to support implementation. What skills are required and what time commitment should be expected?
3. Describe how your system supports single sign-on (SSO) for internal staff.
4. What type of training is provided prior to go-live? Is this provided by the vendor or a third party?
5. Is additional on-premise hardware required to implement your system?
6. Does your product require specific versions of server OS, MS Dynamics CRM, or MS SQL to be compatible?
7. What browsers and operating systems are supported?
8. Can your system be accessed and used to its full capability remotely?
9. Does your system have a mobile app?

B. Ongoing Support

1. How is support handled during implementation? Is one vendor providing support for the entire implementation?
2. After initial implementation, what can the College expect in terms of ongoing consultation and product support?
3. How will support staff be accessible (telephone, in person, virtual, chat)?
4. Is there a limit on the number of staff able to access support?
5. What are your support hours (days and hours)?
6. What is your response time policy? Describe SLA tiers if applicable.
7. Describe the training support you will provide to College staff.
8. What is your product roadmap for AI and marketing automation features over the next 12 to 24 months?

9. Describe your company's financial stability and ownership structure. Has the company undergone ownership changes, mergers, or acquisitions in the past three years?
10. What is your average annual customer retention rate? Describe the process by which the College can export all data — including contact records, communication history, campaign assets, and reporting data — in a portable format if it wishes to exit the platform.

Tab 4: References

- A. Provide at least three (3) references, preferably higher education institutions, and include the following:
 1. Client Name
 2. Contact Name
 3. Contact Title
 4. Contact Phone Number
 5. Contact Email Address
 6. Contract Date(s) and brief description of services provided

Tab 5: Cost Proposal

- A. Vendors shall provide an all-inclusive cost proposal associated with the platform, implementation, training, support, and any required third-party services. The College will not accept claims of additional fees after award. Pricing should be based on the usage volumes provided in Section 3.2.
- B. Describe your licensing model (per user, per contact, flat fee, tiered, etc.) and identify any volume thresholds that would affect the pricing above. Include any additional fees not captured in the table below the schedule on the Pricing Form found in Attachment A.

4.2. EVALUATION AND SELECTION PROCESS

The College will appoint an Evaluation Committee whose responsibility will be to review all responses to this RFP. The College will consider the information provided in the response and the quality of that information when evaluating the Proposal. During the evaluation process, proposers may be requested to provide additional information and/or clarify contents of their proposal.

All proposals will be reviewed to determine if they contain all the required submittals specified in this RFP. Those not submitting all required information in the prescribed format may be rejected.

The Committee will review all responsive and responsible proposals based upon the criteria detailed herein. The selection process may include a request for additional data or oral presentations as deemed necessary by the College. The following criteria will be used in the evaluation of all proposals, not necessarily in level of importance:

- Product specifications and metrics
- Detailed plan for implementation, training and ongoing support
- Vendor's experience in higher education and quality of references
- Cost Proposal

- Proposer's demonstrated Commitment to Diversity/State of Illinois Business Enterprise Program (BEP)

After the evaluation, The College may choose to invite a subset of responders to participate in on-site demonstrations or online Webinar format activities. The purpose of these activities would be to clarify information presented in the written RFP responses. These demonstrations/webinars will be of no cost to the College.

Upon selection and designation of a Proposer, the College intends to negotiate an agreement with the designated Provider. Nothing in this RFP, the proposals, or the College's acceptance of a proposal shall obligate the College to enter into or complete negotiations with any financial advisor.

4.3. SELECTION OF AWARD

A. Basis of Award

The award of the contract will be based on best-value to the College according to the evaluation criteria set forth in this document.

B. Selection Process

The award of the contract will be after the Evaluation Committee submits their Recommendation of Award of the selected Respondent(s) for approval by the College of DuPage Board of Trustees. The College of DuPage reserves the rights to award one (1) or more contracts to select Respondent(s) and/or to reject any and all responses when the best interest of the College will be served thereby. The successful Respondent(s) will be notified by electronic mail that their Proposal has been accepted and that they have been awarded the contract after the approval by the College of DuPage Board of Trustees. Notification will also be posted on the College's Procurement Service website at [http://www.cod.edu/about/Procurement Service/](http://www.cod.edu/about/Procurement%20Service/). Failure to execute performance as per accepted Proposal may result in legal action by the College of DuPage to recover damages.

END OF SECTION

5.0 BUSINESS ENTERPRISE PROGRAM

STATE OF ILLINOIS BUSINESS ENTERPRISE PROGRAM MINORITIES, FEMALES, PERSONS WITH DISABILITY PARTICIPATION AND UTILIZATION PLAN

The Business Enterprise for Minorities, Females and Persons with Disabilities Act (BEP) establishes a goal for community colleges contracting with businesses that have been certified as owned and controlled by persons who are minorities (MBE), female (FBE/ also referred to as WBE), or persons with disabilities (PDBE) (collectively, BEP certified vendor(s)). 30 ILCS 575

Contract Goal to be achieved by Vendor: This solicitation includes an aspirational **BEP** participation goal of 30% based on the availability of BEP certified vendors to perform or provide the anticipated services and/or supplies required by this solicitation.

The BEP participation goal is applicable to all bids or offers. In addition to the award criteria established for this solicitation, the College will award this contract to a Vendor that meets the goal or demonstrates good faith efforts to meet the goal. This goal is applicable to change orders and allowances within the scope of work provided by the BEP certified vendors. **If Vendor is an MBE and FBE certified vendor, the entire goal is met and no subcontracting with a BEP certified vendors is required; however, Vendor must submit a Utilization Plan indicating that the goal will be met by self-performance.**

Following are guidelines for Vendor's completion of the Utilization Plan. The Utilization Plan must demonstrate that Vendor has either: (1) met the entire contract goal; or (2) made good faith efforts towards meeting the goal.

At the time of bid or offer, Vendor, or Vendor's proposed Subcontractor, must be certified with the Illinois Department of Central Management Services as a BEP certified vendor.

Failure to complete a Utilization Plan or provide Good Faith Effort documentation shall render the bid or offer non-responsive; and subject to rejection and/or disqualification in the College's sole discretion.

1. If applicable where there is more than one prime vendor, the Utilization Plan should include an executed Joint Venture Agreement specifying the terms and conditions of the relationship between the parties and their relationship and responsibilities to the contract. The Joint Venture Agreement must clearly evidence that the BEP certified vendor will be responsible for a clearly defined portion of the work and that its responsibilities, risks, profits and contributions of capital, and personnel are proportionate to its ownership percentage. It must include specific details related to the parties' contributions of capital, personnel, and equipment and share of the costs of insurance and other items; the scopes to be performed by the BEP certified vendor under its supervision; and the commitment of management, supervisory personnel, and operative personnel employed by the BEP certified vendor to be dedicated to the performance of the contract. Established Joint Venture Agreements will only be credited toward BEP goal achievements for specific work performed by the BEP certified vendor. **Each party to the Joint Venture Agreement must execute the bid or offer prior to submission of the bid or offer to the College.**

2. An agreement between a vendor and a BEP certified vendor in which a BEP certified vendor promises not to provide subcontracting or pricing quotations to other vendors is prohibited. The College may request additional information to demonstrate compliance. Vendor agrees to cooperate promptly with the College in submitting to interviews, allowing entry to places of business, providing further documentation, and to soliciting the cooperation of a proposed BEP certified vendor. Failure to cooperate by Vendor and BEP certified vendor may render the vendor or offeror non-responsive or not responsible. **The contract will not be awarded to Vendor unless Vendor's Utilization Plan is approved by the College.**
3. **BEP Certified Vendor Locator References:** Vendor may consult CMS' BEP Vendor Directory at <https://supplierdiversitymanagementportal.illinois.gov/VendorDirectory.aspx>, as well as the directories of other certifying agencies, but firms **must be certified with CMS as BEP certified vendors at the time of bid or offer.**
4. **Vendor Assurance:** Vendor shall not discriminate on the basis of race, color, national origin, sexual orientation or sex in the performance of this contract. Failure by Vendor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy, as the College deems appropriate. This assurance must be included in each subcontract that Vendor signs with a subcontractor or supplier.
5. **Calculating BEP Certified Vendor Participation:** The Utilization Plan documents work anticipated to be performed, or goods/equipment provided by all BEP certified vendors and paid for upon satisfactory completion/delivery. Only the value of payments made for the work actually performed by BEP certified vendors, by subcontractors or suppliers to such vendors, is counted toward the contract goal. Applicable guidelines for counting payments attributable to contract goals are summarized below:
 - 5.1 The value of the work actually performed or goods/equipment provided by the BEP certified vendor shall be counted towards the goal. The entire amount of that portion of the contract that is performed by the BEP certified vendor, including supplies purchased or equipment leased by the BEP certified vendor shall be counted, except supplies purchased and equipment rented from the Prime Vendor submitting this bid or offer.
 - 5.2 A vendor shall count the portion of the total dollar value of the BEP contract equal to the distinct, clearly defined portion of the work of the contract that the BEP certified vendor performs toward the goal. A vendor shall also count the dollar value of work subcontracted to other BEP certified vendor. Work performed by the non- BEP certified party shall not be counted toward the goal. **Work that a BEP certified vendor subcontracts to a non-BEP certified vendor will not count towards the goal.**
 - 5.3 A Vendor shall count toward the goal 100% of its expenditures for materials and supplies required under the contract and obtained from a BEP certified vendor manufacturer, BEP certified regular dealer, or BEP certified supplier. A Vendor shall count toward the goal the following expenditures to BEP certified vendors that are not manufacturers, regular dealers, or suppliers:

- 5.3.1** The fees or commissions charged for providing a bona fide service, such as professional, technical, consultant or managerial services and assistance in the procurement of essential personnel, facilities, equipment, materials or supplies required for performance of the contract, provided that the fee or commission is determined by College to be reasonable and not excessive as compared with fees customarily allowed for similar services.
- 5.3.2** The fees charged for delivery of materials and supplies required by the contract (but not the cost of the materials and supplies themselves) when the hauler, trucker, or delivery service is not also the manufacturer or a supplier of the materials and supplies being procured, provided that the fee is determined by the College to be reasonable and not excessive as compared with fees customarily allowed for similar services. The BEP certified vendor's trucking firm must be responsible for the management and supervision of the entire trucking operation for which it is responsible on the contract, and must itself own and operate at least one fully licensed, insured and operational truck used on the contract.
- 5.3.3** The fees or commissions charged for providing any bonds or insurance specifically required for the performance of the contract, provided that the fee or commission is determined by the College to be reasonable and not excessive as compared with fees customarily allowed for similar services.
- 5.4** BEP certified vendors who are performing on contract as second tier subcontractors may be counted in meeting the established BEP goal for this contract as long as the Prime Vendor can provide documentation indicating the utilization of these vendors.
- 5.5** A Vendor shall count towards the goal only expenditures to firms that perform a commercially useful function in the work of the contract.

 - 5.5.1** A firm is considered to perform a commercially useful function when it is responsible for execution of a distinct element of the work of a contract and carries out its responsibilities by actually performing, managing, and supervising the work involved. The BEP certified vendor must also be responsible, with respect to materials or supplies used on the contract, for negotiating price, determining quality and quantity, ordering the materials or supplies, and installing the materials (where applicable) and paying for the material or supplies. To determine whether a firm is performing a commercially useful function, the College shall evaluate the amount of work subcontracted, whether the amount the firm is to be paid under the contract is commensurate with the work it is actually performing and the credit claimed for its performance of the work, industry practices, and other relevant factors.
 - 5.5.2** A BEP certified vendor does not perform a commercially useful function if its role is limited to that of an extra participant in a transaction or contract through which funds are passed through in order to obtain BEP certified vendor participation. In determining whether a BEP certified vendor is such an extra participant, the College shall examine similar transactions, particularly those in which BEP certified vendors do not participate, and industry practices.

5.6 A Vendor shall not count towards the goal expenditures that are not direct, necessary and related to the work of the contract. Only the amount of services or goods that are directly attributable to the performance of the contract shall be counted. Ineligible expenditures include general office overhead or other Vendor support activities.

6. Good Faith Effort Procedures: Vendor must submit Utilization Plans, subcontract documents, and/or Letters of Intent that meet or exceed the published goal. If Vendor cannot meet the stated goal, Vendor must document and explain within the Utilization Plan the good faith efforts it undertook to meet the goal. Utilization Plans are due at the time of and must be enclosed and sealed with the bid or offer submission. Copies of subcontract documents and/or Letters of Intent shall be due upon request.

7. Contract Compliance: Compliance with this section is an essential part of the contract. The following administrative procedures and remedies govern Vendor's compliance with the contractual obligations established by the Utilization Plan. **After approval of the Plan and award of the contract, the Utilization Plan becomes part of the contract.** If Vendor did not succeed in obtaining BEP certified vendor participation to achieve the goal and the Utilization Plan was approved and contract awarded based upon a determination of good faith, the total dollar value of BEP certified vendor work calculated in the approved Utilization Plan as a percentage of the awarded contract value shall become the contract goal.

7.1. The Utilization Plan may not be amended after contract execution without the College's prior written approval.

7.2. Vendor may not make changes to its contractual BEP certified vendor commitments or substitute BEP certified vendors without the prior written approval of the College. Unauthorized changes or substitutions, including performing the work designated for a BEP certified vendor with Vendor's own forces, shall be a violation of the utilization plan and a breach of the contract, and shall be cause to terminate the contract, and/or seek other contract remedies or sanctions.

7.3. If it becomes necessary to substitute a BEP certified vendor or otherwise change the Utilization Plan, Vendor must notify the College in writing of the request to substitute a BEP certified vendor or otherwise change the Utilization Plan. The request must state specific reasons for the substitution or change. The College shall notify the Council or its delegate of the request to substitute a BEP certified vendor or change the Utilization Plan. The College reserves the right to approve or deny a request for substitution or other change in the Utilization Plan.

7.4. Where Vendor has established the basis for the substitution to the College's satisfaction, it must make good faith efforts to meet the contract goal by substituting a BEP certified vendor. Documentation of a replacement BEP certified vendor, or of good faith efforts to replace the BEP certified vendor, must meet the requirements of the initial Utilization Plan. If the goal cannot be reached and good faith efforts have been made, Vendor may substitute with a non- BEP certified vendor or Vendor may perform the work.

- 7.5.** If a Vendor plans to hire a subcontractor for any scope of work that was not previously disclosed in the Utilization Plan, Vendor must obtain the approval of the College to modify the Utilization Plan and must make good faith efforts to ensure that BEP certified vendors have a fair opportunity to submit a bid or offer on the new scope of work.
- 7.6.** A new BEP certified vendor agreement must be executed and submitted to the College within five business days of Vendor's receipt of the College's approval for the substitution or other change.
- 7.7.** Vendor shall maintain a record of all relevant data with respect to the utilization of BEP certified vendors, including but without limitation, payroll records, invoices, canceled checks and books of account for a period of at least three years after the completion of the contract. Full access to these records shall be granted by Vendor upon 48 hours written demand by the College to any duly authorized representative thereof, or to any municipal, state or federal authorities. The College shall have the right to obtain from Vendor any additional data reasonably related or necessary to verify any representations by Vendor. After the performance of the final item of work or delivery of material by the BEP certified vendor and final payment to the BEP certified vendor by Vendor, but not later than 30 calendar days after such payment, Vendor shall submit a statement confirming the final payment and the total payments made to the BEP certified vendor under the contract.
- 7.8.** The College will periodically review Vendor's compliance with these provisions and the terms of its contract. Without limitation, Vendor's failure to comply with these provisions or its contractual commitments as contained in the Utilization Plan, failure to cooperate in providing information regarding its compliance with these provisions or its Utilization Plan, or provision of false or misleading information or statements concerning compliance, certification status or eligibility of the BEP certified vendor, good faith efforts or any other material fact or representation shall constitute a material breach of this contract and entitle the College to declare a default, terminate the contract, or exercise those remedies provided for in the contract or at law or in equity.
- 7.9.** The College reserves the right to withhold payment to Vendor to enforce these provisions and Vendor's contractual commitments. Final payment shall not be made pursuant to the contract until Vendor submits sufficient documentation demonstrating compliance with its Utilization Plan.

UTILIZATION PLAN PART I: COMMITMENT AND SIGNATURE **Required**

The Utilization Plan and either a Letter of Intent written by the Vendor or the Demonstration of Good Faith Efforts to Achieve Goal and Request for Waiver Form must be submitted with Proposal.

_____ (Vendor) submits the following Utilization Plan as part
Respondent Name
of our bid or offer in accordance with the requirements of the BEP Program Status and Participation section of this solicitation.

We understand that all subcontractors must be certified with the CMS BEP Program at the time of submission of all bids and offers. **We understand that compliance with this section is an essential part of this contract and that the Utilization Plan will become a part of the contract, if awarded.**

Vendor submits the following statement:

- Vendor is a BEP certified firm and plans to fully meet the goal through self-performance.
- Vendor has identified BEP certified subcontractor(s) to fully meet the established goal and submits the attached executed Letter(s) of Intent; or
- Vendor has made good faith efforts towards meeting the entire goal as indicated on the attached Utilization Plan, or a portion of the goal, and hereby requests a waiver (complete checklist below).

Vendor's person responsible for compliance with this BEP goal:

Name: _____

Title: _____

Telephone: _____

Email: _____

UTILIZATION PLAN PART II: PARTICIPATION AGREEMENT (Letter of Intent)

Instructions: The Prime Vendor is required to submit a separate, signed and fully completed Participation Agreement from each Business Enterprise Program (BEP) certified vendor or Veteran Small Business certified vendor (VSB). Once signed and submitted with the bid/offer, this Participation Agreement, along with the other Parts of this Utilization Plan, will become a mandated part of the contract, if awarded. The Prime Vendor shall not prohibit or otherwise limit the BEP/VSB certified vendor(s) from providing subcontractor quotes to other potential vendors/offerors.

Project Name: _____ Project/Solicitation Number: _____

Name of Prime Vendor: _____

Address: _____

City, State and Zip: _____

Telephone: _____ Fax: _____ Email: _____

Vendor's Contact responsible for compliance with this Participation Agreement: _____

Name of BEP/VSB Certified Vendor: _____

Type of Certified Vendor: MBE WBE DBE

Address: _____

City, State and Zip: _____

Telephone: _____ Fax: _____ Email: _____

BEP Vendor's Contact responsible for compliance with this Participation Agreement: _____

Type of Agreement: Services Supplies Both Services and Supplies

(a) Proposed % of Contract to be performed by the BEP Certified Vendor _____%
NOTE: The Prime Vendor must indicate the percentage of the estimated contract award that will be subcontracted to the certified BEP Vendor.

(b) Anticipated start date of the Certified BEP Vendor: _____.

(c) This participation agreement shall have a term of _____ to _____, with a total period of years and months, including renewals, change orders or extensions to the underlying contract.

DEMONSTRATION OF GOOD FAITH EFFORTS TO ACHIEVE GOAL AND REQUEST FOR WAIVER

If the BEP participation goal was not achieved, the vendor must provide documented evidence of good faith efforts to achieve the goal.

Below is a checklist of actions that will be used to evaluate a Vendor's Demonstration of Good Faith Efforts and Request for Waiver. **Please check the actions which you completed.** If any other efforts were made to obtain BEP participation in addition to the items listed below, attach a detailed description of such efforts. The College reserves the right to review and audit the results of the vendor's efforts as described below.

- Utilize the CMS' BEP Vendor Directory at <https://ceibep.diversitysoftware.com/?TN=ceibep> to identify BEP certified vendors within the respective commodity/service codes denoted above and at a minimum email all listed vendors and solicit quotes from all vendors who express an interest via follow-up emails or telephone calls.
- Solicit through all reasonable and available means (e.g., attendance at a vendor conference, advertising and/or written notices) the interest of BEP certified vendors that have the capability to perform the work of the contract. Vendor must solicit this interest within sufficient time to allow the BEP certified vendors to respond to the solicitation. Vendor must determine with certainty if the BEP certified vendors are interested by taking appropriate steps to follow up initial solicitations and encourage them to submit a bid or proposal. Vendor must provide interested BEP certified vendors with adequate information about the plans, specifications, and requirements of the contract in a timely manner to assist them in responding promptly to the solicitation.
- Select portions of the work to be performed by BEP certified vendors in order to increase the likelihood that the goal will be achieved. This includes, where appropriate, breaking out contract work items into economically feasible units to facilitate BEP certified vendor participation, even when Vendor might otherwise prefer to perform these work items with its own forces.
- Make a portion of the work available to BEP certified vendors and selecting those portions of the work or material needs consistent with their availability, so as to facilitate BEP certified vendor participation.
- Negotiate in good faith with interested BEP certified vendors. Evidence of such negotiation must include the names, addresses, email addresses, and telephone numbers of BEP certified vendors that were considered and an explanation as to why an agreement could not be reached.
- Thoroughly investigate the capabilities of BEP certified vendors and not reject them as unqualified without sound reasons.
- Make efforts to assist interested BEP certified vendors in obtaining lines of credit or insurance as required by the College.
- Make efforts to assist interested BEP certified vendors in obtaining necessary equipment, supplies, materials, or related assistance or services.

6.0 CERTIFICATIONS **REQUIRED**

IMPORTANT: All Respondents are required to complete this form. Completed form must be returned with response by the RFP deadline. **Failure to return this completed form will result in disqualification of response.**

THE UNDERSIGNED IS CAUTIONED TO CAREFULLY READ THESE CERTIFICATIONS PRIOR TO SIGNING THE SIGNATURE PAGE. SIGNING THE SIGNATURE PAGE SHALL CONSTITUTE A WARRANTY BY THE UNDERSIGNED THAT ALL THE STATEMENTS, CERTIFICATIONS AND INFORMATION SET FORTH WITHIN THESE CERTIFICATIONS ARE TRUE, COMPLETE AND CORRECT AS OF THE DATE THE SIGNATURE PAGE IS SIGNED. THE UNDERSIGNED IS NOTIFIED THAT IF THE COLLEGE LEARNS THAT ANY OF THE FOLLOWING CERTIFICATIONS WERE FALSELY MADE, THAT ANY CONTRACT ENTERED INTO WITH THE UNDERSIGNED SHALL BE SUBJECT TO TERMINATION.

- A. Prevailing Wage Act. To the extent required by law, Contractor shall not pay less than the prevailing wage as established pursuant to an Act Regulating the Wages of Laborers, Mechanics, and Other Workman employed under Contract for Public Workers 820 ILCS 130/1 *et seq.* Our company certifies that it is eligible for bidding on public contracts and has complied with section 11a of the Prevailing Wage Act, 820 ILCS 130.01-12.
Yes _____ No _____
- B. Human Rights Act. To the extent required by law, Contractor shall abide by the Illinois Human Rights Act, 775 ILCS 10/0.01 *et seq.*
- C. Drug Free Workplace. To the extent required by law, Contractor shall abide with the requirements of the Drug Free Workplace Act 30 ILCS 580.1 *et seq.*
- D. Sexual Harassment Policy. Contractor represents by the signing of this agreement that it has a written sexual harassment policy that is in accordance with 775, ILCS 5/2-105 (A) (4).
- E. Non-debarment. By executing this agreement Contractor certifies that it has not been debarred from public contracts in the State of Illinois for violating either 33E-3 or 33E-4 of the Public Contracts Act, 720 ILCS 5/33E-1 *et seq.* (If Applicable)
- F. Fair Employment Practice: Contractor is in compliance with all State and Federal laws regarding Fair Employment Practice as well as all rules and regulations.
Yes _____ No _____
- G. Our company has an Equal Employment Opportunity and Affirmative Action Program which complies with Executive Order 11246, the Vietnam Era Veterans' Readjustment Assistance Act of 1974, and the Rehabilitation Act of 1973.
Yes _____ No _____
- H. When required by law, the Respondent and all Respondent's Subcontractors must participate in applicable apprenticeship and training programs approved by and registered with the United States Department of Labor's Bureau of Apprenticeship and Training as required by Illinois Public Act 093-0642.

ADVICE

- A. MINORITY/WOMAN-OWNED, DISADVANTAGED BUSINESS? **YES _____ NO _____.**
If yes, please attach copy of certification and advise certification number and expiration date below:

Name of Certifying Entity: _____
 Certification #: _____ Expiration Date: _____

- B. STATE NEGOTIATED COOPERATIVE AGREEMENT: YES _____ NO _____
 Contract No. _____

Signature

Respondent/Company Official: _____ Date: _____

7.0 SIGNATURE PAGE **REQUIRED**

IMPORTANT: All Respondents are required to complete and sign this form. Completed form must be returned with proposal by the RFP deadline. **Failure to return this completed form will result in disqualification of proposal.**

Check One:

SOLE PROPRIETOR **PARTNERSHIP** (and/or JOINT VENTURE) **LIMITED LIABILITY COMPANY** **CORPORATION**

The undersigned acknowledges receipt of a full set of RFP Documents and Addenda Numbers _____ (None unless indicated here). **All issued addenda must be signed and returned to the College as per the instructions in the addenda or response will not be accepted.**

The undersigned makes the foregoing response to RFP subject to all of the terms and conditions of the RFP Documents. The undersigned certifies that all of the foregoing statements of the Vendor Certifications are true and correct. The undersigned warrants that all of the facts and information submitted by the undersigned in connection with this response are true and correct.

BUSINESS NAME: _____

BUSINESS ADDRESS: _____

BUSINESS TELEPHONE: _____ FAX NUMBER: _____

EMAIL ADDRESS: _____

CELLULAR TELEPHONE NUMBER: _____

FEIN/SSN: _____

AUTHORIZED SIGNATURE: _____

PRINT NAME: _____ TITLE: _____ DATE: _____

Subscribed to and sworn before me this _____ day of _____, 2026.

My commission expires: _____

Notary Public Signature

Notary Seal

- * Attach hereto a partnership resolution or other document authorizing the individual signing this Signature Page to so sign on behalf of the Partnership.
- ** If the LLC is not registered in the State of Illinois, a copy of a current Certificate of Good Standing from the state of incorporation must be submitted with this Signature Page.
- *** Attach either a certified copy of the by-laws, articles, resolution or other authorization demonstrating such persons to sign the Signature Page on behalf of the LLC.
- *** If the corporation is not registered in the State of Illinois, a copy of the Certificate of Good Standing from the state of incorporation must be submitted with this Signature Page.
- ***** In the event that this Signature Page is signed by any persons other than the President and Secretary, attach either a certified copy of the corporate by-laws, a resolution or other authorization by the corporation, authorizing such persons to sign the Signature Page on behalf of the corporation.

8.0 CONFLICT OF INTEREST DISCLOSURE AND NON-COLLUSION FORM **REQUIRED**

IMPORTANT: All Respondents are required to complete and sign this form. Completed form must be returned with proposal by the RFP deadline. **Failure to return this completed form will result in disqualification of proposal.**

RFP #: _____ DATE: _____

CONFLICT OF INTEREST DISCLOSURE

College of DuPage (COD) reserves the right, at its sole discretion, to reject any and all responses, revise the submission timeline as described in the solicitation, and to discontinue at any time the submission process as described in the solicitation. College of DuPage is requiring that any and all relationships with the College, its Administrators, Trustees, Committee members, COD Foundation Trustees, or any other Employee of the College be disclosed in writing as a part of any response submitted. Contact with any employee of the College of DuPage during the pre-award period, except as noted in the RFP documents, is strictly forbidden and is considered sufficient grounds for dismissal from the RFP process.

VENDOR CONFLICT OF INTEREST DISCLOSURE

Define the relationship with any College of DuPage Administrator, Trustee, Employee, COD Foundation Board member, Committee member, or their immediate family member, with which your company or any of its owners, officers, Trustees, employees, or their immediate family, does business or is likely to do business with, or for which there is an opportunity to influence a related College decision; include the name and relationship to any immediate family member.

Vendor certifies that there is no known conflict of interest with any COD Administrator, Employee, Trustee, Committee member, or COD Foundation Trustee, or their immediate family.

Vendor Printed Name: _____ Title: _____

Signature: _____ **Date:** _____

NON-COLLUSION STATEMENT

The undersigned affirms that he/she is duly authorized to execute a contract and that this company, corporation, firm, partnership or individual has not prepared this response in collusion with any other Respondent, and that the contents of said response have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this response.

Company Name: _____ Owners/Principal(s) Name(s)/Title(s): _____

Vendor Address: _____ City, State, Zip: _____

Phone Number: _____ Fax Number: _____

Email Address: _____

Signature
Respondent/Company Official: _____ **Date:** _____

ATTACHMENT A
PRICE PROPOSAL FORM

Cost Item	Cost (USD)
Licensing - Year 1	\$
Licensing - Year 2	\$
Licensing - Year 3	\$
Licensing - Year 4 (Optional Renewal)	\$
Licensing - Year 5 (Optional Renewal)	\$
Implementation / Onboarding	\$
Data Migration Assistance (if offered)	\$
System Administration Training (Train-the-Trainer)	\$
Ongoing Support / Maintenance / Upgrades (annual)	\$
Any Additional Fees or Services Offered (describe below)	\$
TOTAL — Initial 3-Year Base Contract	\$
TOTAL —Option Years 4 and 5	\$

Describe your licensing model (per user, per contact, flat fee, tiered, etc.) and identify any volume thresholds that would affect the pricing above. Include any additional fees not captured in the table in a narrative below the schedule.

ATTACHMENT B

CAMPUS MAP



College of DuPage

425 Fawell Boulevard
 Glen Ellyn, Illinois
 60137-6599
 (630) 942-2800
 www.cod.edu

Buildings

BIC Rodney K. Berg Instructional Center
 CHC Culinary & Hospitality Center
 GH Greenhouse
 HEC Robert J. Miller Homeland Security Education Center
 HSC Health and Science Center
 HTC Homeland Security Training Center

IRC Institutional Resource Center
 MAC Harold D. McAninch Arts Center
 PEC Physical Education and Community Recreation Center
 SCC Seaton Computing Center
 SRC Student Resource Center
 SSC Student Services Center
 TEC Technical Education Center

Bids must be delivered to the College of DuPage Procurement Services between the hours of 8:00 a.m. to 5:00 p.m. Central Time, Monday through Thursday, in the Institutional Resource Center (IRC) Building, Room 1001, 425 Fawell Blvd., Glen Ellyn, IL 60137 by the due date and time. Note: The College is closed on Fridays during the summer. Proposals will not be accepted on Fridays.

Late Bids will not be accepted. Bids received after the deadline will not be accepted and will be returned to the vendor unopened.

ATTACHMENT C
SAMPLE SERVICE AGREEMENT



SERVICE AGREEMENT ~ \$5000 AND OVER
BETWEEN COLLEGE OF DUPAGE AND _____ (Vendor Name)

This AGREEMENT (“Agreement”) is entered into on _____ by and between **College of DuPage, Community College District No. 502, Counties of DuPage, Cook and Will, and State of Illinois (“College”)** having its main address at 425 Fawell Blvd., Glen Ellyn IL 60137 and **(Vendor Name (“Contractor”))** having an address at Vendor Address.

The College and Contractor desire to enter into this Agreement, by which Contractor shall perform certain services in connection with the project as described below. In consideration of the performance of services by Contractor and the payment for those services by the College, the parties agree as follows:

1. Scope of Services

As directed by the College, Contractor will perform services for Description of Services in connection with the project, including, specifically, the matters set forth on Exhibit 1. Contractor will perform duties at the College using College facilities as appropriate.

2. Performance of Services

Contractor will perform the services with the highest professional standards as practiced in a timely manner and in accordance with any project schedule set forth in Exhibit 1. The parties agree that time is of the essence with respect to Contractor’s performance.

Contractor will assign qualified and experienced personnel to perform the services. Accordingly, all Contractor personnel performing work or services relating to this Agreement will be subject to the College’s approval. Where Exhibit 1 identifies specific Contractor personnel, these individuals will remain assigned to provide the services throughout the term of this Agreement, in accordance with their roles and responsibilities identified in Exhibit 1, unless otherwise approved in writing by the College. No provision of this Agreement (including any incorporated documents) will be effective to any extent that it abridges or abrogates the foregoing standard of care. Contractor will maintain a sufficient staff to perform all services in the most expeditious and economical manner consistent with the interests of the College. Contractor must promptly notify the College immediately in writing: (i) of any information required from the College so Contractor can complete their services in a timely manner; and (ii) of any work requested by the College that is not included in the scope of work provided in Exhibit 1.

Contractor will perform the services in accordance with all applicable laws, rules and regulations, including equal employment opportunity and import and export control laws and regulations. If services are funded through a government grant or contract, Contractor will comply with all laws, regulations, standards, and rules applicable to such grant or contract, as if they were fully set forth in this Agreement.

3. Documents:

All documents (including those in electronic form) prepared by Contractor under this Agreement are the property of the College; provided, however, that any use of such documents, drawings, and surveys, other than for this project, shall be at the College’s sole risk and without liability to Contractor. Among other things, the College will have the right to utilize such documents, drawings, and surveys in the event the

College expands the project, corrects any deficiencies, or makes any repairs or renovations to the project. Contractor shall submit any document, publication, brochure, electronic media, etc., which was developed for College of DuPage under this Agreement to the College for copyright or trademark by the College at its sole discretion.

Upon termination of this Agreement, or at any such time as the College may request, Contractor will deliver to College of DuPage all copies of documents relating to this Agreement in Contractor's possession.

4. Term

The term of this Agreement is from Date to Date unless otherwise terminated in accordance with this Agreement. Services shall not begin, nor shall any payment to Contractor be made or authorized, before execution of this Agreement by an authorized signatory of the College.

The College has the option to extend the term of this Agreement for # of Years additional one-year terms. Before expiration of the then current term, the Purchasing Manager will give Contractor notice, in writing, that the College seeks to exercise its option to renew the Agreement for the approaching option period. The date on which the Purchasing Manager gives notice is the date the notice is mailed, if it is mailed, or the date the notice is delivered, if sent by courier or messenger service. After notification, the Agreement will be amended to reflect the term extension.

5. Contractor

It is understood, acknowledged, and agreed by the Parties that neither Contractor, nor any employee or agent of Contractor, is an employee or agent of the College and thus shall not be entitled to any benefits provided to employees of the College. Contractor has no authority to employ/retain any person as an employee or agent for or on behalf of the College for any purpose. Contractor shall not represent to anyone that Contractor is an employee of the College.

6. Payment

The College will pay Contractor for services properly performed and provided under this Agreement the amounts defined as fees. The fees represent the College's total financial commitment to Contractor for all services and deliverables, applicable taxes, and other obligations under this Agreement. The College is not subject to any sales or use taxes and such taxes will not be included in the fees charged by Contractor. The total amount due to Contractor under this Agreement shall not exceed the following total contract sum without the College's prior written approval:

Total Contract Sum: \$Total Cost

Contractor will provide invoices in a format acceptable to the College for services rendered directly to the Project Director identified in Section 7.

Undisputed invoices will be paid within sixty (60) days of receipt of properly submitted invoices to Contractor, in accordance with the Local Government Prompt Payment Act. Monthly statements shall detail "Current Amount Due," "Previous Amount Billed," and "Balance of Contract Outstanding." In the event the College terminates this Agreement as provided below, Contractor will be paid for services properly rendered before such termination. Reimbursement by the College of expenses and expendables incurred by Contractor will be limited as provided in Exhibit 1.

Contractor must agree to receive all payments from the College via an Automated Clearing House (ACH) transfer (CCD file format only). Instructions for registering for ACH payments are available on the College's Purchasing Department website: <http://www.cod.edu/about/purchasing/index.aspx>.

7. College of DuPage Liaison

While performing these services, it is understood that Contractor will coordinate with Project Manager's Name, Title, College of DuPage.

8. Default

If the Contractor fails to perform the required services within the specified time schedule, or if the Contractor shall become insolvent or be declared bankrupt and shall not cure said condition within seven days or shall make an assignment for the benefit of creditors, the College may give notice in writing to the Contractor and his surety of such default, specifying the same. If Contractor, within a period of seven days after such notice, does not proceed in accordance with the terms of this Agreement, the College shall have full power and authority to declare the forfeiture of this Agreement, and to forfeit any rights of Contractor(s) remaining under this Agreement.

Reliance upon the foregoing remedies, regardless of whether they are exercised by the College due to a default by Contractor, shall not exclude or constitute a waiver of any remedies otherwise provided by law or in equity.

9. Indemnification

To the fullest extent allowed by law, Contractor will indemnify and hold the College, its trustees, officers, agents, employees and any other parties designated by the College (hereinafter collectively called the "Indemnitees") harmless from all losses, claims, liabilities, injuries, damages and expenses, including but not limited to, all attorneys' fees, defense and court costs and expenses, that the Indemnitees may incur arising out of, or occurring in connection with, the acts or omissions by Contractor of its duties and obligations under or pursuant to this Agreement.

10. Insurance

The Contractor shall not commence work under this contract until all insurance required herein is obtained and approved by the Owner. Nor shall the Contractor allow any subcontractor to commence work until all similar insurance required of the subcontractor has been so obtained.

The Contractor shall furnish the College of DuPage with a Certificate of Insurance, with College of DuPage, its trustees, officers, agents, employees, and any other parties designated by COD named as an additional insured for Commercial General and Automobile Liability, showing the minimum coverage indicated below. Insurance companies must have a Best Rating of at least A VI and otherwise be acceptable to the College. Workers' Compensation insurance shall include a waiver of subrogation in favor of the College of DuPage. The College will also be shown as the certificate holder. Further, the Certificate of Insurance shall state that coverage provided is primary to any other coverage available to College of DuPage. An endorsement page showing coverage must accompany the certificate of insurance. The foregoing certificate shall contain a provision that coverage afforded under the policies will not be cancelled or non-renewed until at least sixty (60) days prior written notice has been given to College of DuPage.

TYPE OF INSURANCE

MINIMUM INSURANCE COVERAGE

Combined Single Limit Per Occurrence/Aggregate

Commercial General Liability including:

THIS AGREEMENT IS NOT LEGALLY BINDING UPON THE COLLEGE OF DUPAGE UNLESS AND UNTIL IT IS EXECUTED BY AN AUTHORIZED SIGNATORY OF THE COLLEGE OF DUPAGE. THE COLLEGE OF DUPAGE WILL HONOR NO OTHER APPROVAL OR AUTHORIZATION FOR PERFORMANCE OF OR PAYMENT FOR SERVICES BY THE SERVICE PROVIDER.	PAGE 3 OF 11
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- 1. Premises – Operations \$1,000,000 / \$2,000,000
- 2. Explosion, Underground and Collapse Hazard
- 3. Products/Completed Operations
- 4. Contractual Insurance
- 5. Broad Form Property Damage
- 6. Independent Contractors
- 7. Bodily Injury

Automobile Liability

Owned, Non-owned, or Rented \$1,000,000 / \$2,000,000

Workers' Compensation and Employers' Liability

As Required by Applicable Laws

Professional Liability

If Performance Specifications are Required by the Contract

11. Business Enterprise Program

The College of DuPage encourages the participation of qualified minorities, females, and persons with disabilities owned businesses in public contracts. It is the College's policy to promote and encourage the continuing economic development of businesses owned by minorities, females, and persons with disabilities by setting aspirational goals to award contracts to such businesses for certain services, and to award contracts to such businesses for certain services in accordance with the provisions of the Business Enterprise for Minorities, Females, and Persons with Disabilities Act, 30 ILCS 575/0.01 *et seq.*

12. Warranty

Contractor warrants all goods and/or services covered by this Agreement to be as specified, or in conformity with any sample provided by seller suitable for the purpose intended, of merchantable quality and free of defects in material, workmanship and design for a period of one year after being placed in service by the College, or two years from delivery to College, whichever is shorter. Contractor agrees to repair or replace (F.O.B. Contractor's original point of delivery and without expense to the College) any article or workmanship not conforming to this warranty.

13. Compliance with All Laws

Contractor agrees to comply with all applicable local, state, and federal laws, rules, regulations, and executive orders, including the following provisions, that relate to the manufacture, sale, and shipment of the goods covered by this Agreement.

- a. Human Rights Act: To the extent required by law, contractor shall abide by the Illinois Human Right Act, 775 ILCS 5/1-101 *et. seq.*
- b. Drug Free Workplace: To the extent required by law, Contractor shall abide with the requirements of the Drug Free Workplace Act 30 ILCS 580.1 *et. seq.*
- c. Sexual Harassment Policy: Contractor represents by the signing of this Agreement that it has a written sexual harassment policy that is in accordance with 775 ILCS 5/2-105.
- d. Equal Employment Opportunity: Contractor agrees to comply fully with the Federal Equal Employment Opportunities Act, including 29 C.F.R./Part 1609 "Guidelines on Harassment," the Illinois Human Rights Act, the Americans with Disabilities Act, and all applicable rules and regulations promulgated thereunder and all amendments made thereto, Title VII of the Civil Rights Act of 1964, as amended, and Section 504 of the Rehabilitation Act of 1973, and any additions or amendments, and Contractor represents certifies and agrees that it has implemented a sexual harassment policy pursuant to 775 ILCS 5/2-105 and that no person shall be denied or refused service or other full or equal use of Contractor services, or denied employment

opportunities by Contractor on the basis of race, creed, color, religion, sex, national origin or ancestry, age disability unrelated to ability, marital status, or unfavorable discharge from military service.

- e. Fair Employment Practice: Contractor represents it is in compliance with all State and Federal laws regarding Fair Employment Practice as well as all rules and regulations.
- f. Prevailing Wage Act: To the extent required by law, Contractor may not pay less than the prevailing wage as established pursuant to an Act regulating the wages of laborers, mechanics, and other workman employed under Contract for Public Workers 820 ILCS 130/1 *et seq.*
- g. Non-debarment: Contractor certifies that it has not been debarred from public contracts in the State of Illinois for violating either 33E-3 or 33E-4 of the Public Contracts Act, 720 ILCS 5/33E-1 *et seq.*

14. Entire Agreement

This Agreement represents the entire agreement between Contractor and the College and supersedes all previous negotiations or agreements, written or oral, which are not included in this Agreement. This Agreement may only be amended by written instrument executed by the College and Contractor. In the event of a conflict between this Agreement and any proposal and related exhibits provided by Contractor, this Agreement shall control.

15. Governing Law and Venue

This Agreement shall be governed by and construed in accordance with the laws of the State of Illinois, without regard to conflict of law provisions. Venue for any disputes arising under or in connection with this Agreement shall be in the Circuit Court of the Eighteenth Judicial Circuit of the State of Illinois, or in the United States District Court for the Northern District of Illinois, Eastern Division.

16. Severability and Non-Waiver

If any provision of this Agreement is found to be unenforceable, the other provisions of this Agreement shall not be affected but shall remain in full force and effect. No waiver by either party of any breach or default by the other party shall be construed to be a waiver of any other breach or default by such other party.

17. Notices

All communications and notices or matters relating to contract interpretation, a dispute, or indemnification obligations to the College from the Contractor must be faxed, delivered personally, electronically mailed or mailed first class, postage prepaid, to the using department that appears on the applicable purchase order, with a copy to the College of DuPage Purchasing Department. Contractor must include the College's contract number or relevant purchase order number in any notice.

Notice to:

College of DuPage

College of DuPage
Procurement Department
Institutional Resource Center
IRC - Room 1001
425 Fawell Blvd.
Glen Ellyn, Illinois 60137
Attention: Procurement Manager
purchasing@cod.edu

Contractor

Vendor Name
Vendor Address
City, State, Zip Code
Attention: Contact Name
Email: **Contact Email Address**

18. No Assignment by Contractor

Contractor may not, by operation of law, merger, or otherwise, assign any of its rights, agreements, or obligations under this Agreement without the prior written consent of the College. Any purported assignment by Contractor without the prior written consent of the College shall be null and void and shall not bind the College. Subject to the preceding sentence, all of the terms, agreements, covenants, representations, warranties, and conditions of this Agreement shall be binding upon, and inure to the benefit of and are enforceable by, the parties and their respective successors and assigns.

19. Termination

The College may terminate this Agreement and the services at any time, in whole or in part, with or without cause, upon written notice to Contractor. Five (5) days written notice is required in the event the contract is terminated with cause, and 30 days written notice is required in the event the contract is terminated without cause. In the event this Agreement is terminated under this paragraph, Contractor will be compensated for services properly rendered through the date of termination, as can be documented to the reasonable satisfaction of the College. The College shall not be responsible for any services or expenses incurred after the date of termination. In addition, should the College terminate this Agreement for cause, the College will be entitled to all direct, indirect, and consequential damages arising from the breach of Agreement that prompted the termination for cause.

20. Arbitration

At the College’s sole and exclusive option, all claims, controversies, and disputes between the College and Contractor arising out of or relating to this Agreement will be resolved in binding arbitration. Contractor agrees to be joined in any arbitration in which the College is a party to the extent that such arbitration relates to Contractor’s performance under this Agreement. In addition, the College shall have the sole and exclusive option to join as a party to such arbitration any entity that the College determines has an interest in the arbitration.

21. Attorneys’ Fees

In any action to enforce any of the provisions or rights arising under this Agreement, the prevailing party in such litigation, as determined by a court of proper jurisdiction in a final judgment or decree, shall be entitled to its costs, expenses and reasonable attorneys’ fees incurred therein.

22. Conflicts of Interest

Contractor represents that it, to the best of its knowledge, has no relationship or ownership interest and will not acquire any interest, direct or indirect, in any enterprise, which would conflict in any manner or degree with the performance of the services under this Agreement.

Contractor must disclose in writing as a part of any bid submitted or contract if a relationship or ownership interest exists; Contractor must define the relationship with any College of DuPage Administrator, Trustee, employee, Foundation Board Member, committee member, or their immediate family member, with which Contractor or any of its owners, officers, Trustees, employees, or their immediate family, does business or is likely to do business with, or for which there is an opportunity to influence a related College decision; include the name and relationship to any immediate family member.

Contractor certifies that it has no known conflict of interest with any College of DuPage Administrator, employee, Trustee, committee member, or College of DuPage Foundation Board Member, or their immediate family.

Signature Page Follows

THIS AGREEMENT IS NOT LEGALLY BINDING UPON THE COLLEGE OF DUPAGE UNLESS AND UNTIL IT IS EXECUTED BY AN AUTHORIZED SIGNATORY OF THE COLLEGE OF DUPAGE. THE COLLEGE OF DUPAGE WILL HONOR NO OTHER APPROVAL OR AUTHORIZATION FOR PERFORMANCE OF OR PAYMENT FOR SERVICES BY THE SERVICE PROVIDER.	PAGE 6 OF 11
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Contract Signature Page

SERVICE AGREEMENT

Department Name: COLLEGE OF DUPAGE - COD DEPARTMENT NAME

Vendor Name:

Description of Services:

Board Approval Required: Yes [] NO [] Date: Board Approval Date

In consideration thereof, both parties agree to the conditions set forth above. The undersigned, on behalf of the College of DuPage, a Body Politic and Corporate of the State of Illinois, this Agreement is hereby executed by:

Contractor: College of DuPage

Vendor Name

Print Name /Title

Vice President Administration / Chief Financial Officer

Signature

Signature

Tax ID or FEIN

Date

Date

Contractor and the College agree with the terms stated above and certify that Contractor has received a copy of the contract agreement.

EXHIBIT 1

May use template below to provide details regarding the work and specifications to be performed, milestones and deliverables for this Contract or attach Quote clearly detailing the services to be performed:

1. SCOPE OF WORK

1. Description of Services:

1.1. Provide a detailed explanation of the services to be performed (describe need and how the service provider will meet those needs):

1.2. Who will be responsible for performing the services? Please provide names of individuals who will be completing the services in connection with this Scope of Work.

1.3. Provide the name and contact information for the College project or program user.

1.4. What are the milestones and deliverables required during the project? Include a project schedule.

1.5. Where will the services be performed? What, if anything does the College have to provide for the services to be performed?

2. Payment (Itemized):

Contractor will perform and provide all the services and deliverables in accordance with this Agreement for a fixed amount or time and materials not to exceed \$Cost (the “fees”). The total fee includes all other expenses, including transportation and subsistence expenses.

Itemize all costs, time and material rates along with any expenses in connection with the fee or attached quote. Expenses and expendables shall be paid only with the prior written consent of the College.

EXHIBIT 2

Contractor may not commence work under this Agreement until all insurance required herein is obtained and approved by the College. Nor may the Contractor allow any subcontractor to commence work until all similar insurance required of the subcontractor has been so obtained.

Affix Certificate of Insurance

(Sample Certificate Attached)

Exhibit 2: Insurance Certificate of Coverage

Named Insured: _____

Bid # /Contract #: _____

Address: _____
(Number and Street)

(College)

(State)

(ZIP)

Description of Operation/Location	
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The insurance policies and endorsements indicated below have been issued to the designated named insured with the policy limits as set forth herein covering the operation described within the contract involving the named insured and the College of DuPage. The Certificate issuer agrees that in the event of cancellation, non-renewal or material change involving the indicated policies, the issuer will provide at least thirty (30) days prior written notice of such change to the College of DuPage at the address shown on this Certificate. This certificate is issued to the College of DuPage in consideration of the contract entered into with the named insured, and it is mutually understood that the College of DuPage relies on this certificate as a basis for continuing such agreement with the named insured:

Type of Insurance	Insurer Name	Policy Number	Expiration Date	Limits of Liability All Limits in Thousands
General Liability <input type="checkbox"/> Claims made <input type="checkbox"/> Occurrence <input type="checkbox"/> Premise-Operations <input type="checkbox"/> Explosion/Collapse Underground <input type="checkbox"/> Products/Completed-Operations <input type="checkbox"/> Blanket Contractual <input type="checkbox"/> Broad Form Property Damage <input type="checkbox"/> Independent Contractors <input type="checkbox"/> Personal Injury <input type="checkbox"/> Pollution				CSL Per Occurrence \$ _____ General Aggregate \$ _____ Products/Completed Operations Aggregate \$ _____
Automobile Liability <input type="checkbox"/> Excess Liability <input type="checkbox"/> Umbrella Liability				CSL Per Occurrence \$ _____ Each Occurrence \$ _____
Worker's Compensation and Employer's Liability				Statutory/Illinois Employers Liability \$ _____
Builders Risk/Course of Construction				Amount of Contract
Professional Liability				\$ _____
Owner Contractors Protective				\$ _____
Other				\$ _____

- a) Each Insurance policy required by this agreement, excepting policies for worker's compensation and professional liability, will read: "The College of DuPage is an additional insured as respects operations and activities of, or on behalf of the named insured, performed under contract with or permit from the College of DuPage."
- b) The General, Automobile and Excess/Umbrella Liability Policies described provide for severability of Interest (cross liability) applicable to the named insured and the College.
- c) Workers Compensation and Property Insurers shall waive all rights of subrogation against the College of DuPage.
- d) The receipt of this certificate by the College does not constitute agreement by the College that the insurance requirements in the contract have been fully met, or that the insurance policies indicated by this certificate are in compliance with all contract requirements.

Name and Address of Certificate Holder and Recipient of Notice	
Certificate Holder/Additional Insured College of DuPage Purchasing Department 425 Fawell Boulevard, BIC1540 Glen Ellyn, IL 60137	Signature of Authorized Rep. _____ Agency/Company: _____ Address _____ Telephone _____

For College use only

Name of College Department requesting certificate: (Using Dept.) _____

Attention: _____

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ATTACHMENT D
NO BID/PROPOSAL FORM

College of DuPage
NO-BID/RFP RESPONSE
2026-R0021
Marketing Automation Platform

In the event that your organization chooses not to submit a proposal for this solicitation, the College of DuPage Procurement Services Department is interested in the reasons why vendors/consultants have chosen not to submit a bid or proposal response in order to better serve the taxpayers of the College of DuPage. Please indicate your reason(s) by checking all applicable items below and return this form to the email address shown below.

- Could not meet the specifications
- Items or materials requested not manufactured by us or not available to our company
- Insurance requirements too restricting
- Bond requirements too restricting
- Scope of services not clearly understood or applicable (too vague, too rigid, etc.)
- Project not suited to our organization
- Quantities too small
- Insufficient time allowed for preparation of bid/proposal response
- Other (please specify):

Vendor Name: _____

Contact Person: _____

Telephone: _____

Email: _____

If you are not bidding on this solicitation, please email this form to:
College of DuPage Procurement Services
Email: purchasing@cod.edu