



**KENT STATE**  
UNIVERSITY  
**Procurement Department**

**REQUEST FOR PROPOSAL #2021**

**RFP #2021:** **A Constituent Resource Management (CRM) System of Engagement for the Division of Enrollment Management**

**DATE OF ISSUE:** **Monday, March 9, 2026**

**PROPOSALS DUE:** **Friday, March 27, 2026, no later than 4:30 PM Eastern**

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Proposals must be received electronically through DynamicForms. No other submission method will be accepted, unless otherwise disclosed in the RFP Instructions and Specifications. The confirmation of receipt of your response must be noted as “Signed” no later than the “Proposals Due” date and time specified above. The Forms History of your DynamicForms account will also note the date and time of your proposal submission. Proposals submitted after the “Proposals Due” date and time specified above will be rejected.

Proposals are to be submitted in accordance with the enclosed Proposal Instructions and Specifications. There will not be a formal proposal opening.

The Procurement Department shall at all times reserve the right to reject any or all proposals, award partial proposals, waive any proposal informalities or irregularities, and request new proposals if doing so is deemed to be in the best interests of Kent State University.

Questions pertaining to any specifications contained herein should be directed to:



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## 1.0 PROJECT TIMELINE

All respondents are expected to adhere to the following timeline in completion of the Request for Proposal process:

- **Monday, Marh 9, 2026:** RFP issued
- **Friday, March 27, 2026, 4:30 PM Eastern:** Proposals due via DynamicForms submission; distribution of proposals received and evaluations to begin the following **Monday, March 30, 2026**
- **Period of March 30 through April 10, 2026:** Evaluation of proposals received; follow-up questions sent to select respondents AND/OR selection and scheduling of finalists for presentations/interviews, if necessary
- **Week of April 13, 2026, specific date(s) TBA:** Vendor presentations, if necessary
- **Late April 2026:** Anticipated announcement of contract award; drafting and negotiation of contract
- **May 2026:** Formal execution of contract, and integration logistics with awarded vendor to follow
- **Wednesday, July 1, 2026:** Launch of new solution

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## 2.0 OVERVIEW OF KENT STATE UNIVERSITY

**Overview of Kent State University:** Kent State University is classified as an R1: Doctoral Universities – Very High Research Activity institution under the Carnegie Classification of Institutions of Higher Education. This designation reflects the university's scale, research output, and doctoral education activity.

Kent State University operates an eight-campus system serving nearly 41,000 students systemwide. The Kent Campus, which houses the university's central administration and primary procurement operations, enrolls approximately 26,000 students, including undergraduate, graduate, and professional populations. The university supports a significant residential student population and provides academic, research, healthcare, housing, dining, athletic, and auxiliary services across its campuses.

Kent State University includes the following facilities relevant to procurement and contract performance:

- Kent Campus (Kent, Ohio): Main campus and administrative headquarters
- Seven Regional Campuses across Northeast Ohio
- College of Podiatric Medicine (Independence, Ohio)
- Urban and Professional Academic Centers (Cleveland, Columbus, and New York City)
- International Academic Sites in Florence (Italy) and Geneva (Switzerland)

Kent State University offers more than 430 academic programs spanning certificate, associate, bachelor's, master's, doctoral, and professional degrees. Academic programs are organized into ten (10) colleges and one independent school, supporting a broad range of instructional and research activities. As an R1 research institution, Kent State conducts high-volume sponsored research, supports advanced laboratories and data environments, and requires vendors to meet elevated standards for security, reliability, compliance, and performance.

The university serves a diverse student body, including international students from more than 100 countries, creating operational requirements related to accessibility, data protection, logistics, and global engagement.

Kent State University sponsors nineteen (19) NCAA Division I varsity athletic teams competing in the Mid-American Conference (MAC), including Football Bowl Subdivision (FBS) football. Athletics and campus life operations contribute to procurement needs across facilities, equipment, events, health, wellness, and support services.

As a public institution, Kent State University conducts procurement in accordance with:

- State of Ohio competitive solicitation requirements
- Public transparency and records-retention laws
- Ethical standards and audit requirements

The university seeks vendors with demonstrated experience in:

- Public-sector or higher-education contracting
- Multi-year and performance-based agreements
- Regulatory, data security, and cybersecurity compliance
- Scalable and sustainable service delivery

Kent State University represents a large, complex, research-intensive public university customer with systemwide operational needs. Vendors responding to this RFP should be prepared to support multi-campus environments, comply with public-sector requirements, and operate as long-term institutional partners.

**The Division of Enrollment Management:** The Division of Enrollment Management serves students and their families through the offices of Admissions, Research and Analytics, University Registrar, University Scholarships and Financial Aid and the Financial, Billing and Enrollment Center. We provide leadership and expertise through a strategic enrollment management approach that seeks to serve current and prospective students by providing high-

quality service through personal connections, technology, and streamlined business processes throughout the student life cycle, from recruitment through graduation.

For more information about Kent State, visit [www.kent.edu](http://www.kent.edu).

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### 3.0 REQUEST FOR PROPOSAL INSTRUCTIONS

- 3.1 Proposal Instruction and Information:** In order to receive consideration, companies responding to this RFP are required to submit their proposal electronically through DynamicForms. No other submission method will be accepted, unless otherwise disclosed in the RFP Instructions and Specifications. The confirmation of receipt of your response must be noted as “Signed” no later than the “Proposals Due” date and time specified above. The Forms History of your DynamicForms account will also note the date and time of your proposal submission. Proposals submitted after the “Proposals Due” date and time specified above will be rejected.

**Forms 1 through 9 must be completed, dated, and signed by a responsible company official, in addition to the information requested of your company.**

**It is the responsibility of the respondent to ensure that all required documentation, as enumerated above, is submitted on time. Any submissions received after the stated date and time, or those that do not contain the required information as enumerated above, will be considered incomplete and unresponsive, and will be disqualified.**

Instructions, manufacturer’s model or catalog numbers, etc., where shown herein, are for descriptive purposes to guide the proposer in interpretation of the quality, design, and performance desired, and shall not be construed to exclude proposals based on furnishing other types of material or service which may be judged as an acceptable alternate. If the description of your offer differs in any way, you must give a complete detailed description of your quotation including pictures and literature where applicable. Unless specific exception is made, assumption will be that you are submitting a proposal exactly as the specifications of this document require. All prices MUST BE FIRM. Proposers will be expected to deliver on order(s) at the price quoted.

This RFP is part of a competitive procurement process which helps to serve the University’s best interests. It also provides Vendors with a formal and unrestrictive opportunity for their services to be considered. The process of competitive negotiation being used in this case should not be confused with the process of competitive sealed bidding. The latter process is usually used where the goods and services being procured can be precisely described and price is generally the determinative factor. With an RFP and competitive negotiation, however, price is not required to be the determinative factor, although it may be, and the University has the flexibility to negotiate with one or more Vendors to arrive at a mutually agreeable relationship. Check your proposal carefully for it may not be corrected after the proposal has been opened.

- 3.2 New Product Lines:** Upon written request by the successful proposer, new related product lines not available at the time of proposal bidding, may be added during the course of any agreement resulting from this RFP at like discounts for the represented manufacturers.
- 3.3 Specifications:** Specifications have been based on products and services familiar to the University and are used for the purpose of description and establishing quality desired. Acceptable alternates will also be considered.
- 3.4 Exceptions to Specifications:** The proposer shall clearly state in the quote any exceptions to, or deviations from, these specifications, terms or conditions; otherwise, the proposer will be responsible for compliance with all requirements listed herein. Proposers shall provide a separate, itemized list of any and all exceptions. Such list must be cross referenced to the corresponding numbered item in this bid.
- 3.5 Additional Information:** In the event that information submitted by the proposer is unclear to the University, the University may request additional explanation from the proposer for the purpose of evaluation and decisions. The proposer shall answer requests for additional information or clarification in writing, and these responses will become part of the company’s overall submission. Proposers failing to provide adequate information on any issue in a timely manner to allow a comprehensive evaluation by the University shall be considered unresponsive, and their proposal subject to rejection.

**3.6 Verbal Information:** Respondents shall NOT base the proposal on verbal information from any employee of the University from the date and time the RFP is received by the proposer, unless otherwise noted elsewhere in the RFP. Any such incident will invalidate the proposal, and bar that particular vendor from receiving a purchase or contract award. In case errors or omissions are found in the proposal document, companies submitting proposals shall at once inform the signee in the Procurement Department who will publish the correction to all companies.

**3.7 Evaluation and Contract Award:** Selection and award of contract will be made to the vendor(s) whose proposal, in the sole opinion of Kent State University, represents the best overall value to the University. Factors which determine the award are more fully detailed in the specifications, and will include, but will not be limited to, the following: The proposer's responsiveness to all specifications in the RFP, quality of the proposer's products and/or services, ability to fulfill the contract, and general responsibility as evidence of past performance. Payment terms and cash discounts will be considered as determining factors in the contract award.

Should the total potential spend of the contract resulting from this RFP, inclusive of all possible renewals, exceed or appear to exceed \$1.0 million, the final selection will be pending Board of Trustees approval at its next scheduled meeting; and appropriate contract review, approval and execution pursuant to University Policy.

Notwithstanding the above, this RFP does not commit the University to enter into any contracts as described in this document. The University reserves the right to reject any or all offers and to waive formalities and minor irregularities in the proposals it receives.

**3.8 Proposer Presentations:** Proposers submitting proposals which meet the selection criteria and which are deemed to be the most advantageous to the University may be required to give an oral presentation to the University selection team. Scheduling of these oral presentations will be done by the Procurement Department.

**3.9 Samples:** Requested samples necessary for evaluation must be provided without cost or obligation to Kent State University, and shall become the property of the University. Upon request by the supplier, unless destruction, alteration or retention of the sample is required for evaluation purposes, samples may be returned to supplier at supplier's expense.

**3.10 Rights Reserved:** The University reserves, and in its sole discretion may, but shall not be required to, exercise the following rights and options with respect to the proposal submission, evaluation and selection process under this RFP:

- To reject any proposal if, in the University's sole discretion, the proposal is incomplete or is not responsive to the requirements of this RFP, the Respondent does not meet the Qualifications set forth in the RFP, or it is otherwise in the University's best interest to do so;
- To supplement, amend, substitute or otherwise modify this RFP at any time prior to selection of one or more respondents for negotiation or to cancel this RFP with or without issuing another RFP;
- To accept or reject specific items or elements in any proposal and award a contract based only on such items or elements if it is deemed in the University's best interest to do so;
- To reject the proposal of any respondent that, in the University's sole judgment, has been delinquent or unfaithful in the performance of any contract with the University, or is financially or technically incapable or is otherwise not a responsible respondent;
- To waive any informality, defect, non-responsiveness and/or deviation from this RFP and its requirements that is not, in the University's sole judgment, material to the proposal;
- To permit or reject at the University's sole discretion, corrections (including for information inadvertently omitted), of proposals by some or all of the respondents following proposal submission;
- To request that some or all of the respondents modify proposals based upon the University's review and evaluation;
- To request additional or clarifying information or more detailed information from any respondent at any time, before or after proposal submission, including information inadvertently omitted by a respondent;
- To inspect and otherwise investigate projects performed by the respondent, whether or not referenced in the proposal, with or without the consent of or notice to the respondent;

- To conduct such investigations with respect to the financial, technical, and other qualifications of respondents as the University, in its sole discretion, deems necessary or appropriate.
- To enter into post-submission negotiations and discussions with any one or more respondents regarding price, scope of services, and/or any other term of their proposals, and such other contractual terms as the IUC-PG may require, at any time prior to execution of a final contract. The University may, at its sole election, enter into simultaneous, competitive negotiations with multiple respondents or negotiate with individual respondents seriatim. In the event negotiations with any respondent(s) are not satisfactory to the University, the University reserves the right to discontinue such negotiations at any time; to enter into or continue negotiations with other respondents; and, to solicit new proposals from entities that did not respond to this RFP.

### 3.11 Procedure for Conducting Negotiations:

#### —Who To Negotiate With First

After completion of the initial evaluation process, the University may begin negotiations with one or more vendors whose proposals are most in keeping with the University's requirements as enumerated in the RFP. Notification of such negotiations will be offered after a reasonable amount of time has elapsed from the proposal deadline. Negotiations shall continue to the satisfaction of the University or, if the University determines a satisfactory agreement cannot be reached, the University may initiate negotiations with one or more of the remaining vendors.

#### —Negotiations With Multiple Vendors

The University reserves the right, at all times during the negotiation process, to negotiate with one or more vendors at the same time, but is under no obligation to do so. The vendor(s) with whom the University enters into negotiations must have present a representative with decision-making authority.

#### —If Negotiations Are Unsuccessful

With respect to any of the services that are a part of this RFP, in the event that the University determines that a contract cannot be negotiated with any of the vendors who respond to the RFP, the University shall have the right to issue a new RFP or other process to seek qualified applicants, to provide the services itself, or to use another process (e.g., sole source contracting) in order to have the product(s) and/or service(s) provided.

- 3.12 **Valid Proposals:** Proposals will be considered valid for a period of one hundred-twenty (120) days after the scheduled due date, unless otherwise noted.

- 3.13 **Preferred Invoicing and Payment Methods:** The successful proposer must invoice products or services awarded exactly as indicated on a resultant University purchase order, to include cost, unit specified, quantity ordered, item descriptions, etc.

The University prefers to receive invoices for goods and services via electronic means. It is the goal of the University to make payment on invoices via Automated Clearing House (ACH) transfer or Credit Card. To that end, please indicate your company's capabilities for electronic invoicing and ACH/Credit Card payment where appropriate in Section 8 of this document.

- 3.14 **Dun and Bradstreet Data:** Kent State University reserves the right to request data from Dun and Bradstreet concerning history of company's financial and payment statistics. Proposals from companies failing to provide the requested data to Dun and Bradstreet will not be considered.

- 3.15 **Preference to United States and Ohio Products:** State of Ohio Am. H.B. 271 requires that preference be given to products produced or mined in the United States and in Ohio

- 3.16 **Buy America:** Proposals will be evaluated to determine that a proposer's offering is for a "domestic source end product", as defined in the Federal Buy America Act, 41 U.S.C.A., section 10a-10d. Any proposer's offering that does not meet this requirement shall be rejected, except in those circumstances where a determination has been made that certain articles, materials and supplies are not mined, produced or manufactured in the U.S. in sufficient and reasonably available commercial quantities and of satisfactory quality.

- 3.17 Buy Ohio:** Sections 125.09 and 125.11 of the Ohio Revised Code require that in the evaluation of bids, the University give preference to products which are “mined, excavated, produced, manufactured, raised, or grown in the state by a person where the input of Ohio products, labor, skill, or other services constitutes no less than 25% of the manufactured cost”, or products offered by bidders who have a “significant Ohio presence”, defined to mean that the bidders: (1) pay required taxes to the state of Ohio; (2) are registered and licensed to do business in the state of Ohio with the Office of Secretary of State; and (3) have ten or more employees based in Ohio, or seventy-five percent or more of their employees based in Ohio.

Any bids meeting the above criteria will be given a preference of up to five (5) percent over the lowest price "non-Ohio" bid submitted; except that such preference will not be applied against vendors from bordering states, provided that the border state imposes no greater restrictions than contained in sections 125.09 and 125.11 of the Ohio Revised Code. Where it has been determined that selection of the lowest Ohio proposer, if any, will not result in an excessive price or a disproportionately inferior product or service, the contract shall be awarded to the low Ohio proposer at the proposal price quoted. Where it is advantageous to award the contract to other than an Ohio proposer or Proposers from a border state, then the contract shall be awarded accordingly.

- 3.18 H.B. 476, State Contract and Boycotting:** Pursuant to R.C. 9.76(B), by responding to this RFP, respondent warrants that it is not boycotting any jurisdiction with whom the State of Ohio can enjoy open trade, including Israel, and will not do so during the term of any contract that may result from this RFP.

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#### 4.0 REQUEST FOR PROPOSAL CONTRACTING AND AGREEMENT TERMS

4.1 **Contract:** The following terms and conditions shall be incorporated in any final contract or purchase order resulting from this RFP except as such terms and conditions are otherwise expressly specified in any such contract or purchase order.

4.2 **Term/Period of Agreement:** The initial term of the agreement will be for three (3) years with a target inception date to be determined/negotiated post-award, but implementation of the new solution to begin Wednesday, July 1, 2026.

After the initial three (3)-year term, Kent State University reserves the right to renew this contract for additional one (1)-year terms, with mutual assent, not to exceed two (2) such renewals. Any renewal agreed upon shall occur ninety (90) days prior to the expiration of the contract then in force, for a five (5)-year maximum contract duration. Any renewal agreed upon shall occur ninety (90) days prior to expiration of the contract then in force and shall be executed upon the mutually signed agreement of both parties.

It is understood and agreed that Kent State University reserves the right to extend the contract period a maximum of thirty (30) days beyond the normal expiration of this contract. Any further extension as may be required will be exercised through mutual assent.

4.3 **Termination:** Either party may terminate this contract after the expiration of sixty (60) days from the effective date of the contract. Termination may occur by giving the other party ninety (90) days prior written notice of its intent to terminate the contract, except that any breach of this contract shall be just cause for the University to terminate the contract immediately without such prior notice to you. The in case of any termination resulting from breach of contract, the Procurement Department may, at its discretion, prohibit proposer from submitting a proposal on any project at the University for a period of up to three (3) years.

4.4 **Choice of Law:** This Request for Proposal will be governed, interpreted and construed in accordance with the laws of the State of Ohio.

4.5 **Extended Payment Clause:** Kent State University may, upon written notice to the proposer receiving the contract, suspend or terminate the unpaid balance of this contract, if the Ohio General Assembly, in a subsequent biennium, fails to appropriate funds making possible the continuation of such payment.

4.6 **Vendor Responsibilities:** Vendor may not, during the term of the contract, or any renewals or extensions thereof, assign or transfer all or any part of the contract without the prior written consent of the University; and, should Vendor become insolvent, or if proceedings in bankruptcy shall be instituted by or against Vendor the remaining or unexpired portion of the contract shall, at the election of the University, be terminated.

4.7 **Value:** The contract will not guarantee a specific amount of business, or income and is not an exclusive contract. The University reserves the right to place purchase orders in any manner deemed by the University to be in its own best interest.

4.8 **Estimated Requirements:** The University in no way obligates itself to purchase the full quantities indicated, but the entire amount of any discount offered must be allowed whether or not the purchases are more or less than the full quantities indicated. The University's requirements may be greater than or less than the quantities shown, and the Vendor shall be obligated to fulfill all requirements as shown on the purchase orders whose mailing dates fall within the term of the contract.

4.9 **Sales Tax:** Kent State University is exempt from Ohio sales tax and federal tax and will furnish an exemption certificate upon request.

- 4.10 Price and Freight:** All pricing must be quoted FOB Destination, Kent, Ohio. Include all freight, transportation, and any applicable handling and/or installation charges necessary to complete delivery on an FOB Destination basis. Please specify if your pricing is quoted delivered or pickup.
- 4.11 Title and Risk of Loss:** Supplier shall retain title and bear the risk of any loss or damage to the items purchased until they are delivered at the specified FOB point; and upon such delivery, title shall pass and supplier's responsibility for loss or damage shall cease except as resulting from the supplier's negligence or failure to comply to all stated terms and conditions. Passing of title upon such delivery shall not constitute acceptance of the terms by Kent State University.
- 4.12 Supplier Onboarding System:** Kent State University utilizes a designated third-party provider for onboarding and managing vendors in our system. Vendors awarded contracts with Kent State University must register with our designated third-party provider and provide their business information as required by our provider. Vendors are responsible for maintaining and updating their profile information via the designated third part providers system. More information about Kent State University's vendor onboarding provider and process can be found on Accounts Payables homepage <https://www.kent.edu/accountspayable>
- 4.13 Payment Terms and Cash Discounts:** Kent State University will endeavor to use any cash terms offered, and these could be considered in determining the final net price depending on the discount period.

In the event that Kent State University is entitled to a cash discount, the period of computations will commence on the date of delivery or receipt of a correctly completed invoice, whichever is later. If an adjustment is necessary due to damage, the cash discount period shall commence on the date final approval for payment is authorized. If a discount is part of the contract, but the invoice does not reflect the existence of a cash discount, the University is entitled to a cash discount with the period commencing on the date it is determined that a cash discount applies.

- 4.14 Rejection of Goods or Services:** All goods or services purchased herein are subject to approval by Kent State University. Any rejection of goods or services resulting because of nonconformity to the terms and specifications of the contract, whether held by the buyer or returned, will be at the proposer's risk and expense.
- 4.15 Guarantee and Warranty Requirements:** Vendor guarantees all products and installation against any defect in workmanship and/or materials. Full manufacturer's warranty for labor and materials for all equipment proposed, and a comprehensive list of all authorized service centers must be provided by supplier. List to include the company name, location, and telephone number.
- 4.16 Product Substitutions:** There will be no substitutions of ordered product allowed unless the University has first been notified and permission granted.
- 4.17 Price Adjustment:** All prices quoted are expected to remain firm during the initial term of the contract; however, in the event of a price change related to an increase or decrease, prices may be changed subject to a negotiated adjustment to reflect such an increase or decrease. Such negotiations and adjustments will be considered only upon written request to the Procurement Department, documented with cost data, filed prior to our request for delivery and submitted after the expiration of ninety (90) days from the date of the proposal closing.
- 4.18 Audits:** With advance notice to Vendor, from time to time during the contract term and for five (5) years after termination of the contract, Kent State University reserves the right to audit Vendor's performance under, and compliance with the requirements of, the contract. The University will utilize all invoicing and documentation, which relates to Kent State University's final cost, and internal controls documentation required under the contract including, but not limited to any applicable audit or security assessment reports or certifications such as: SAS 70 or its replacement SSAE 16, SOC 2, or ISO 27001, and copies of any applicable corporate information security policies or other supporting documentation. University personnel from the Division of Enrollment Management, the Division of Information Technology, the Procurement Department, and/or the Auditing Department may perform these audits. Audit discrepancies must be resolved to the reasonable satisfaction of Kent State University, and the

University reserves the right to terminate the any contract resulting from this RFP if at any time the audit results are not resolved to its reasonable satisfaction.

Vendor must provide access to files and information reasonably necessary, including, but not limited to all cancelled checks, work papers, books, records and accounts upon which invoices are based, and any and all documentation and justification in support of expenditures or fees incurred pursuant to the contract, to validate cost data and internal controls, and assist in the performance of each audit. Audit discrepancies must be resolved to the satisfaction of Kent State University. Kent State University reserves the right to terminate the contract at any time if the audit results are not resolved to meet the requirements of Kent State University.

- 4.19 Sales Representative:** Vendor will provide the name and telephone number of the company sales representative who may be contacted Monday through Friday 8am to 4pm (EST), exclusive of holidays. Vendor representative shall have primary responsibility for processing and correcting all breaches of this contract and shall be authorized to accept emergency and special orders. Vendor must notify the University when the regular sales representative is on vacation and identify the individual acting in his/her absence.
- 4.20 Extending Resulting Contracts:** Please advise if your company has an interest in extending your offer to the Inter-University Council of Ohio Purchasing Group (IUC-PG) membership. This is a courtesy request and there is no obligation to agree to it. It is not part of the University’s selection criteria. Should you choose to extend usage, participation in the contract by other IUC-PG members is strictly voluntary on their part, and the University’s sole role and responsibility would be to share the contents of the contract with them.

In no way must any decision by your company to extend the contract to the IUC-PG members negatively affect the delivery capability, general service level, prices, discounts, product availability or other contractual obligations to the University.

Please indicate in your response package if your company agrees to extend any resulting contracts to include other IUC-PG members who may have an interest in utilizing it and describe any regional or geographic limitations.

- 4.21 Time is of the Essence:** Time is of the essence in completing this project. Any breach of the terms of this contract, including, but in no way limited to the time period of performance, will be just cause to terminate the contract without prior notice to the Vendor. Termination resulting from breach will be cause, at the sole discretion of the University, to suspend the proposer from proposing on any project at the University for a period of up to three (3) years.
- 4.22 Parking:** Kent State University operates under a paid parking system. All Vendor-owned vehicles and privately-owned vehicles of Vendor personnel that are to be parked on campus must comply with existing parking regulations. If parking permits are required, the successful proposer will purchase appropriate numbers of permits from Kent State University Parking Services. All regulations concerning parking can be obtained from Parking Services. Vendor is to take care that sidewalks are not blocked and all handicap areas are fully accessible.
- 4.23 Federal, State and Local Laws:** Vendor shall, in the performance of work or services, fully comply with all applicable federal, state or local laws, rules, regulations and ordinances, and shall hold Kent State University harmless from any liability from failure of such compliance.
- 4.24 Governmental Approvals:** Vendor shall obtain all permits, certificates of inspection and any and all governmental approvals relating to his/her work, and shall pay all charges connected therewith.
- 4.25 Indemnification/Hold Harmless:** Vendor shall indemnify and hold Kent State University harmless from and against all claims, losses, expenses, damages, causes of actions and liabilities of every kind and nature (including without limitation reasonable attorney’s fees), arising out of any alleged breach of any proposer’s obligations or warranties or from any other acts or omissions of Vendor, its officers, agents, employees and subcontractors.

**4.26 Force Majeure:** If University or Vendor is unable to perform any part of its obligations under this contract by reason of force majeure, the party will be excused from its obligations, to the extent that its performance is prevented by force majeure, for the duration of the event. The party must remedy with all reasonable dispatch the cause preventing it from carrying out its obligations under this contract. The term “force majeure” means without limitation: acts of God; such as epidemics; lightning; earthquakes; fires; storms; hurricanes; tornadoes; floods; washouts; droughts; any other severe weather; explosions; restraint of government and people; war; strikes; and other like events; or any other cause that could not be reasonably foreseen in the exercised of ordinary care, and that is beyond the reasonable control of the party.

**4.27 Insurance for Vendor Services:** If this contract involves services, and unless otherwise approved by the University in writing, Vendor shall, at its sole cost and expense, procure and maintain, in full force and effect, the types and minimum limits of insurance specified below, covering its performance of the services provided hereunder by Vendor, its agents, representatives, employees or subcontractors. Vendor shall procure such insurance from duly licensed or approved non-admitted insurers in the State of Ohio with an “A.M. Best” rating of not less than A-VII or otherwise acceptable to the University:

(a) **Workers’ Compensation/Employers’ Liability.**

Coverage: Worker’s Compensation for losses arising from work performed by or on behalf of the Vendor

- State Fund or Self-Insurance: Statutory Limits
- Proof of Employers' Liability: \$500,000

(b) **General Liability Insurance.**

Coverage: Policy shall include bodily injury, property damage, personal injury, contractual liability, fire legal liability, medical payments coverage, and sexual molestation/abuse if Vendor is interacting with minors

- Each Occurrence: \$1,000,000
- General Aggregate Accrual: \$2,000,000
- Products-Completed Operations Aggregate Accrual: \$2,000,000

(c) **Business Automobile Liability.**

Coverage: Bodily injury and property damage for any owned, leased, hired and non-owned vehicles used in the performance of the Vendor services

- Combined Single Limit: \$1,000,000

(d) **Insurance Required as Applicable:**

(1) **Professional Liability Insurance—if applicable.**

Coverage: Policy required for licensed or certified professionals, including, without limitation, accountants, architects, consultants, and engineers.

- Each Occurrence: \$1,000,000
- General Aggregate: \$2,000,000

Professional Liability Insurance may be written on a claims-made basis provided that coverage for occurrences happening during the performance of the Services required under this Contract shall be maintained in full force and effect under the policy or “tail” coverage for a period of at least three (3) years after completion of the Services.

(2) **Liquor Liability—if applicable.**

Coverage: Policy for service provider distributing, selling or serving alcoholic beverages.

- Each Occurrence: \$1,000,000
- General Aggregate: \$1,000,000

(3) **Crime Coverage—if applicable.**

Coverage: Policy for service provider with access to cash or payments, networks or outsources services such as custodial, building management, dining, etc.

- Single Loss: \$500,000

- (4) **Cyber Liability—if applicable.**  
Coverage: Policy for service provider who has access to credit card information, student or employee records, health records, or any other Personally Identifiable Health Information.
- Each event for Breach Response/Event Services: \$1,000,000
- (5) **Pollution Liability—if applicable.**  
Coverage: Policy for service provider working with pollutants, coverage shall include coverage for 3rd party claims and clean-up.
- Each incident: \$1,000,000

All required policies shall meet the following requirements:

- shall be endorsed on a primary basis, non-contributory with any other insurance coverages and/or self-insurance carried by the University.
- all insurance herein, except Professional Liability and Pollution Liability, shall be written on an “occurrence” basis and not a “claims-made” basis.
- Shall be endorsed to include University and its governing board, officers, agents and employees as additional insureds with respect to liability arising out of the services performed by or in behalf of Vendor. Such endorsement shall be evidenced on the Certificate of Insurance as well as a copy of the endorsement to the Vendor’s insurance.
- Shall contain a waiver of subrogation in favor of University and its board, officers, agents and employees for losses arising from work performed by or on behalf of Vendor.
- Limits may be met with a combination of primary and/or excess/umbrella coverage or equivalent.
- Coverage provided by Vendor shall not be limited to the liability assumed under the indemnification provision set for in Section 4.25 above.

Service Provider shall furnish the University’s Procurement Department, at the address provided herein, with Certificates of insurance (ACORD form or equivalent) as required by the services being provided under this Contract. In no event shall Vendor perform any services or other work until Vendor has delivered or caused to be delivered to the University’s Procurement Department the required evidence of insurance coverages.

All insurance coverages shall provide for at least thirty (30) days prior written notice to be given to the University in the event coverage is reduced, suspended, voided, cancelled, or non-renewed.

- 4.28 Proprietary Information Disclosure:** All responses and accompanying documentation will become the property of the University at the time proposals are opened. All submitted proposal materials may be subject to disclosure under the Ohio Public Records Law (ORC 149.43). Personal Social Security numbers, if provided in Section 7, will be redacted prior to release. If you choose to submit documentation containing information your company considers trade secret, please be aware that the University may have a duty to release the documentation in response to a public record request. If you wish to claim that certain information contained in the materials is trade secret, your company bears the burden of identifying that information, as well as taking steps to demonstrate that it is subject to protection under the law.
- 4.29 Marketing and Advertising:** Vendor shall not willfully use the name, identifying marks or property of Kent State University for its own promotional purposes.
- 4.30 Use of Designs:** Vendor agrees that it will keep confidential the features of any equipment, tools, gauges, patterns, designs, drawings, engineering data or other technical or proprietary information furnished by the University and use such items only in the production of item(s) awarded pursuant to the contract. Upon demand or completion of resultant purchase order, the proposer shall return all such item(s) to the university at the expense of the Vendor, or make other disposition thereof as may be directed or approved by the University.
- 4.31 Performance Bond:** If required, Vendor shall, within ten (10) days of the contract award, furnish a performance bond in the amount of 100% of the contract price.

**4.32 Equal Employment Opportunity:** Kent State University is an Equal Opportunity Employer and as such makes the following request: The proposer, in submitting a proposal and /or filling a purchase order, agrees not to discriminate against any employee or applicant for employment with respect to hiring and tenure, terms, conditions, or privileges of employment, or any matter directly or indirectly related to employment, because of race, color, religion, gender, age, sexual orientation, national origin, disability, or identity as a disabled veteran or veteran of the Vietnam era to the extent required by law. The proposer must further agree that every subcontract or order given for the supplying of this order will contain a provision requiring nondiscrimination in employment, as herein specified. This covenant is required pursuant to Federal executive orders 11246 and 11375 and any breach thereof may be regarded as a material breach of the contract or purchase order. Additionally, Proposer must comply with the following:

The Equal Employment Opportunity Act of 1972, as amended, 42 U.S.C. 2000e et seq., which prohibits discrimination in employment because of race, color, religion, sex or national origin. The Rehabilitation Act of 1973, as amended, 29 U.S.C. 701 et seq. and 45 C.F.R. 84.3(J) and (K) implementing Sec. 504 of the Act which prohibits discrimination against qualified individuals with disabilities in the access to or participation in federally-funded services or employment. The Age Discrimination in Employment Act of 1967, as amended, which generally prohibits discrimination based upon age. The Equal Pay Act of 1963, as amended, 29 U.S.C. 206, which provides that an employer may not discriminate on the basis of sex by paying employees of different sexes differently for the same work.

**4.33 Prevailing Wage Rate:** If applicable under Ohio law, Vendor must agree to pay all employees involved with the installation on this project, the prevailing wage rate as ascertained by the Department of Industrial Relations of the State of Ohio.

**4.34 Drug Free Workplace:** Vendor agrees to comply with all applicable state and federal laws regarding drug – free workplace and shall make a good faith effort to ensure that all its employees, while working at Kent State University, will not purchase, transfer, use or possess illegal drugs or alcohol or abuse prescription drugs in any way.

**4.35 Smoke-Free, Tobacco-Free University:** Smoking and the use of nicotine, tobacco-derived or plant based products, and oral tobacco are not permitted on any property owned, operated or leased by Kent State University inclusive of personal vehicles parked on University property. All smoking is prohibited, including the use of electronic smoking devices, mod boxes or electronic nicotine delivery systems that create an aerosol or vapor. Vendors, contractors and other respondents to this RFP may not use cigarettes, cigars, cigarillos, cloves, hookahs, e-cigarettes, herbal and oil vaporizers, pipes, water pipes, any smokeless tobacco (chew, snuff, dip, etc.), and any other non-FDA approved nicotine products while conducting business on University property.

**4.36 Americans with Disabilities Act:** Without limiting the requirements of Subsection 4.49, *Electronic Information Technology Accessibility*, Seller agrees to comply with the Title II of the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. §§ 12131-12134, and it implementing regulation 28 C.F.R. pt. 35, which prohibits public universities from excluding individuals with disabilities from participating in and/or receiving the benefits of University services, programs, and activities, Section 504 of the Rehabilitation Act of 1973, as amended, 29 U.S.C. § 794, and its implementing regulation at 34 C.F.R. Part 104, which prohibits a qualified individual with a disability, solely by reason of disability, from being excluded from participation in, being denied benefits of, or being subjected to discrimination under any University activity, and other applicable State of Ohio laws and regulations regarding accessibility and disability. Accordingly, Seller represents and warrants that the products and/or services provided hereunder are functionally accessible to individuals with disabilities. Compliance means that a person with a disability can acquire the same information, engage in the same interactions, and enjoy the same services as a person without a disability, in an equally effective and integrated manner, with substantially equivalent ease of use.

**4.37 Conflicts of Interest and Ethics Compliance:** Vendor represents, warrants, and certifies that it and its employees engaged in the administration or performance of the Agreement are knowledgeable of and understand the Ohio Ethics and Conflicts of Interest laws. Vendor further represents, warrants, and certifies that neither Vendor nor any of its employees will do any act that is inconsistent with such laws.

- 4.38 Executive Order Banning the Expenditure of Public Funds on Offshore Services:** Vendor affirms that it has read and understands Executive Order 2019-12D issued by Ohio Governor Mike DeWine and shall abide by those requirements in the performance of any Contract arising from this RFP, and shall perform no services required under this Contract outside of the United States.

The Vendor also affirms, understands, and agrees to immediately notify the State of any change or shift in the location(s) of services performed by the Vendor or its subcontractors under this Contract, and no services shall be changed or shifted to a location(s) that are outside of the United States.

If Vendor or any of its subcontractors perform services under this Contract outside of the United States, the performance of such services shall be treated as a material breach of the Contract. The State is not obligated to pay and shall not pay for such services. If Vendor or any of its subcontractors perform any such services, Vendor shall immediately return to the State all funds paid for those services. The State may also recover from the Vendor all costs associated with any corrective action the State may undertake, including but not limited to an audit or a risk analysis, as a result of the Vendor performing services outside the United States.

The State may, at any time after the breach, terminate the Contract, upon written notice to the Vendor. The State may recover all accounting, administrative, legal and other expenses reasonably necessary for the preparation of the termination of the Contract and costs associated with the acquisition of substitute services from a third party.

If the State determines that actual and direct damages are uncertain or difficult to ascertain, the State in its sole discretion may recover a payment of liquidated damages amounting to a percentage of the value of the Contract, such a percentage to be determined.

The State, in its sole discretion, may provide written notice to Vendor of a breach and permit the Vendor to cure the breach. Such cure period shall be no longer than 21 calendar days. During the cure period, the State may buy substitute services from a third party and recover from the Vendor any costs associated with acquiring those substitute services.

Notwithstanding the State permitting a period of time to cure the breach or the Vendor's cure of the breach, the State does not waive any of its rights and remedies provided the State in this Contract, including but not limited to recovery of funds paid for services the Vendor performed outside of the United States, costs associated with corrective action, or liquidated damages.

—Assignment/Delegation

The Vendor will not assign any of its rights, nor delegate any of its duties and responsibilities under this Contract, without prior written consent of the State. Any assignment or delegation not consented to may be deemed void by the State.

- 4.39 Executive Order 2022-02D:** The Vendor confirms that they are not a Russian institution or company and will comply with this order at:  
[https://content.govdelivery.com/attachments/OHIOGOVERNOR/2022/03/03/file\\_attachments/2093123/Signed%20EO%202022-02D.pdf](https://content.govdelivery.com/attachments/OHIOGOVERNOR/2022/03/03/file_attachments/2093123/Signed%20EO%202022-02D.pdf).

“Company” means a sole proprietorship, partnership, corporation, national association, *société anonyme*, limited liability company, limited partnership, limited liability partnership, joint venture, or other business organization, including their subsidiaries and affiliates, that operates to earn a profit. Pursuant to Executive Order 2022-02D and to the extent practicable, the University is prohibited from purchasing services from or investments in Russian institutions or companies.

- 4.40 Finding for Recovery; Debarment:** Ohio Revised Code Section 9.242 prohibits any vendor who has been debarred by any state agency to participate in any contract during the debarment period. Further, Vendor represents and warrants that it is not now, and will not become during the term of any contract resulting from this RFP, subject to an unresolved finding for recovery under ORC Section 9.24 and is not under any suspension or debarment by

any office of the state of Ohio or the federal government. If this representation and warranty is found to be false, any contract resulting from this RFP shall be void, and the Vendor shall immediately repay to the university any funds paid under the contract. If Vendor becomes subject to an unresolved finding for recovery under ORC Section 9.24 and/or is suspended or debarred by any office of the state of Ohio or the federal government during the term of the contract, such finding for recovery, suspension or debarment shall be considered a material breach of such contract, and the University may, at its sole discretion, terminate the contract.

**4.41 Campaign Contributions:** Vendor hereby certifies that all applicable parties listed in Division (I)(3) or (J)(3) of O.R.C. Section 3517.13 are in full compliance with Divisions (I)(1) and (J)(1) of O.R.C. Section 3517.13.

**4.42 Biobased Products Bid Reference Policy:** The Department of Administrative Services, other state agencies and state institutions of higher education must procure biobased products that fall within the designated item categories list compiled by the United States Department of Agriculture, as maintained by the Department of Administrative Services. State agencies must procure equipment, materials, and supplies in accordance with procedures set forth in Ohio Revised Code section 123:5-1-14. Biobased products may be considered and a preference may be applied for those biobased products meeting the specifications set forth in bidding documents when applicable. For those proposals in which biobased products are offered, Vendor must list or otherwise identify and certify those products.

The minimum content for the anticipated biobased purchase shall be derived from the United States Department of Agriculture’s determination of minimum content for the designated item.

**4.43 Data Security Requirements/PCI Compliance:**

- 1) Will this product or service have involvement in creating, storing, processing, transmitting, or accessing University data or handling financial transactions?
  - a) If yes, will any data be removed by, accessed from, copied to, or created within systems that do not reside within the geographical boundaries of Kent State University?
    - i. If yes, complete the “Higher Education Cloud Vendor Assessment Tool Lite”, <https://www.kent.edu/it/higher-education-cloud-vendor-assessment-tool-lite> .Include a copy of any applicable audit or security assessment reports or certifications such as: SSAE 16, SOC 2, or ISO 27001 and include copies of any applicable corporate information security policies or other supporting documentation that will substantiate the questionnaire responses.
      - (1) If an NDA is required for the disbursement of any of these documents or information, provide a copy of the NDA in your response.
- 2) Will this product or service have involvement in the processing of credit card transactions (Card-Present, Card-Not-Present, Online, Phone-based, or otherwise)?
  - a) If yes, submit a QSA-signed Attestation of Compliance to the Payment Card Industry Data Security Standards (“PCI-DSS”).
  - b) If yes, Vendor acknowledges and agrees to the following statements:
    - i. Kent State University requires that Vendor at all times maintain compliance with current PCI DSS as applicable. Accordingly, the Vendor will be required to provide confirmation of compliance upon request by Kent State University throughout the contract term. Respondent hereby acknowledges that cardholder data may only be used for execution of the contracted systems or services as described herein, or as required by the PCI DSS, or as required by applicable law.
    - ii. If, during the contract term, Vendor becomes aware that systems or services provided under the contract falls out of compliance with PCI DSS requirements, the Vendor shall immediately notify the Kent State University Office of Security and Access Management.
    - iii. In the event of a breach, intrusion, or unauthorized access to cardholder data, Vendor shall immediately notify the Kent State University Office of Security and Access Management to allow for the PCI DSS breach notification process to commence. Vendor shall provide appropriate payment card companies and their respective designee’s access to Vendor’s facilities and all pertinent records to conduct a review of Vendor’s compliance with the PCI DSS requirements. Vendor acknowledges liability for any and all costs resulting from such breach, intrusion, or unauthorized access to cardholder data deemed to be the fault of Vendor. Vendor agrees to assume responsibility for informing all such individuals in accordance with applicable law and to

indemnify and hold harmless Kent State University and its officers and employees from and against any claims, damages, or other harm related to such breach.

- 4.44 European General Data Protection Regulation:** If Kent State University’s Cyber Security and Privacy Department in the Division of Information Technology, determines that the services provided within this RFP involve the transfer of personal data subject to the European General Data Protection Regulation, the supplier will be required to execute the University’s European General Data Protection Regulation addendum. <https://www.kent.edu/sites/default/files/file/GDPR%20Vendor%20Addendum%20KSU%20FINAL%200619%20DF.pdf>
- 4.45 H.B. 476, State Contract and Boycotting:** Pursuant to R.C. 9.76(B) Vendor represents and warrants that Vendor is not boycotting any jurisdiction with whom the State of Ohio can enjoy open trade, including Israel, and will not do so during the contract period.
- 4.46 Health Insurance Portability and Accountability Act of 1996 (HIPAA) Compliance:** Vendor agrees to comply with the Health Insurance Portability and Accountability Act of 1996 (“HIPAA”), and the regulations promulgated thereunder, including without limitation the federal privacy regulations (the “Federal Privacy Regulations”) and the federal security standards (the “Federal Security Standards”), as such provisions are applicable to delivery of the goods or services being provided pursuant to and contract resulting from this RFP. Vendor acknowledges that an entity’s status as a business associate is determined under law, regardless of such entity’s opinion as to its status as a business associate; and if an entity is, under applicable law, a business associate, such entity has a direct legal obligation in its own right to comply with all legal requirements applicable to a business associate. Accordingly, Vendor agrees not to use or further disclose any protected health information, as defined in 45 CFT 164.504, or individually identifiable health information, as defined in 42 USC § 1320d (collectively the “Protected Health Information” or “PHI”), other than as permitted by the requirements of HIPAA or regulations promulgated under HIPAA including without limitation the Federal Privacy Regulations and the Federal Security Regulations. Vendor agrees to implement appropriate safeguards to prevent the use or disclosure of Protected Health Information as applicable to the performance of any agreement arising from this RFP. The successful Vendor agrees to promptly report to University any improper or unlawful use or disclosure of any PHI arising out of or relating to the products and or services arising from this RFP.
- 4.47 Electronic Information Technology (EIT) Accessibility Compliance:** If any component of the proposed product or service is an Electronic Information Technology (EIT) product or service as such products or services are defined below in this Section, then your proposal must include a response to this section so the proposed product or service can be evaluated by university personnel for compliance with the University Policy 4-16.

EIT product(s) and/or service(s) include, but are not limited to, systems and application software (including mobile), online services such as learning management systems, content management systems, access portals, online marketing solutions, websites, web content and multimedia, digital materials (video, audio, etext, ebooks, lab simulations, virtual reality systems, augmented reality systems), telecommunications, and self-contained products such as displays, kiosks, touchscreens, operable controls (key carded door openers), and personal response systems.

To clarify, this form must be completed if **ANY COMPONENT of your product/service contains a DIGITAL (EIT) element**, something a user or administrator must interact with on a screen to use your product/service.

**The following examples DO require the completion of this form.**

*Example 1*

**Physical Product:** Payment kiosks on parking lots

**Accompanying EIT Element:** Screen that users must navigate to complete transaction

*Example 2*

**Physical Product:** Package lockers

**Accompanying EIT Element:** Software used by employees and users to track packages and locker use

**Example 3****Physical Product:** Electric battery charging stations for vehicles**Accompanying EIT Element:** Accompanying mobile app to reserve locations and pay for charging

Pursuant to University Policy 4-16, Kent State University is committed to ensuring that its electronic and information technologies, including but not limited to, all information provided through university and third-party websites, online learning and course management systems, and curriculum, institutional and administrative data systems: (a) provide equal opportunity to the educational benefits and opportunities afforded by the technology; (b) provide equal treatment in the use of such technology; and (c) be accessible to individuals with disabilities in compliance with Section 504 of the Rehabilitation act of 1973, as amended and the Americans with Disabilities Act of 1990, as amended (ADA-AA) and other applicable laws of the State of Ohio.

**Requirements for Vendors submitting a proposal for an EIT product and/or service:** Provide information about the digital accessibility of proposed product(s) and/or services(s). This process is handled via an online form. Please carefully read the instructions below:

- a. The form should be completed by Vendor's **lead technical staff member** best suited to share information about the digital accessibility of the product and/or service.
- b. Form is located at: **Digital Accessibility RFP Vendor Questionnaire**
- c. If available, please make sure to attach a completed VPAT when completing the form. A blank template of the VPAT is available at **VPAT Info and Template**

NOTE: KSU may, in its sole discretion, deem as non-responsive, any form submission that is deemed by the university as incomplete.

**If the proposed product or service is not an EIT product or service AND HAS NO ACCOMPANYING DIGITAL ELEMENTS, consider this section complete.**

- 4.48 Sponsorship:** The successful Respondent agrees to engage with the University, as reasonably requested by the University's Corporate Partnerships and Philanthropy office, to collaboratively explore potential sponsorship, marketing and/or philanthropic opportunities that may support University initiatives and that may provide strategic value to the bidder. Nothing in this provision obligates the Respondent to make any financial or philanthropic commitment, and any such commitments shall be voluntary and subject to separate agreement, if applicable. This requirement is intended solely to facilitate communication and collaboration between the Respondent and the University's Corporate Partnerships and Philanthropy office.
- 4.49 Supplier Onboarding/PaymentWorks:** Kent State University utilizes a designated third-party provider for onboarding and managing vendors in our system. Vendors awarded contracts with Kent State University must register with our designated third-party provider and provide their business information as required by our provider. Vendors are responsible for maintaining and updating their profile information via the designated third part providers system. More information about Kent State University's vendor onboarding provider and process can be found on Accounts Payables homepage <https://www.kent.edu/accountspayable>.

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## 5.0 REQUEST FOR PROPOSAL FORMAT AND EVALUATION CRITERIA

**5.1 Format and Content of Proposals:** To respond to this RFP, vendors are to submit their proposal electronically through DynamicForms. No other submission method will be accepted, unless otherwise disclosed in the RFP Instructions and Specifications. The confirmation of receipt of your response must be noted as “Signed” no later than the “Proposals Due” date and time specified above. The Forms History of your DynamicForms account will also note the date and time of your proposal submission. Proposals submitted after the “Proposals Due” date and time specified above will be rejected. The proposal must be signed by a person authorized to bind the proposing form to the representations, commitments and statements contained in this response. Proposals should be prepared as simply as possible and provide a straightforward description of the Proposer’s capabilities to satisfy the requirements and goals of the RFP. Proposer should concentrate on accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and labeled clearly.

Kent State University considers it to be of utmost importance that the successful Vendor(s) present evidence of their ability to perform prior to the awarding of this contract partnership. The contract partnership shall be awarded to company that will best serve the interest of Kent State University, and, in determining the responsible proposer, the University shall consider the responses to the following requested information.

All proposals submitted shall conform to the following format requirements. Deviation from these requirements may disqualify a supplier from consideration. The response must contain the following information and documents:

- a. **Forms 1 through 9:** Signed and dated, completed through DynamicForms.
- b. **The submission requirements enumerated in Section 6, “Specifications”:** Please format all requirements as noted and submit via DynamicForms.
- c. If applicable, **completion of the Higher Education Cloud Vendor Assessment Tool Lite**, submitted as a separate attachment to the DynamicForms submission.
- d. **Assumptions, Clarifications, and Exclusions:** Describe any and all of the assumptions, clarifications, or exclusions to the proposal.
- e. Provide cost proposal and/or price quotation as indicated in Section 6, and include any additional specification documentation you deem necessary to support your proposal.
- f. Include any additional documentation you deem necessary to support your proposal.

**5.2 Evaluation Criteria and Process:** All proposals received from Vendors will be reviewed and evaluated by a committee of qualified University personnel. Selection and award of contracts will be made to the supplier(s) whose proposal, in the sole opinion of Kent State University, represents the best overall value to the University. Factors which determine the award include, but will not be limited to, the following: The proposer’s responsiveness to all specifications in the RFP, quality of the proposer’s products and/or services, ability to fulfill the contract, and general responsibility as evidence of past performance. Payment terms and cash discounts will be considered as determining factors in the contract award.

*(Continued on next page.)*

## 6.0 REQUEST FOR PROPOSAL SPECIFICATIONS

### SCOPE AND INTENT

Enrollment Management at Kent State University desires a CRM system of engagement that will address our existing needs with a capacity for growth in the future. The optimal solution will support our multi-campus institution's plan to use data driven analytics to drive the success of new student recruitment across the institution. Our intent is to evaluate the proposed system against our requirements and choose the system that can best address our needs. It is desirable for a solution that is configurable without requiring extensive programming or code modification from the University's Information Technology division. We seek a comprehensive software and architecture that minimizes the number of vendors involved.

Our goal is to develop a CRM strategy using technology that offers the ability to integrate with our various systems of record, analytics tools, and databases. We currently employ a CRM system for use in two separate databases/instances; the first for the pre-enrollment and application cycle and a second instance for current student business practices and student success initiatives. As you consider your response, indicate the pros and cons of having one or two standalone systems.

### REQUIREMENTS/QUALIFICATIONS

Proposers are asked to provide the following:

#### Vendor Experience and References

- 1) List a maximum of five references/sites where the proposed solution has been installed. The references should use Banner by Ellucian and have operations, systems scope, and volume of users comparable to Kent State.
  - a. References should use the CRM for Undergraduate, Graduate, and International admissions.
- 2) For each reference, indicate which criterion applies and supply the following information:
  - a. Reference organization name and address
  - b. Description of services provided
  - c. Year of installation
  - d. Contact name(s)
  - e. Contact telephone numbers
  - f. Indicate if this contract is being actively serviced
  - g. Size of institution (annual applicant numbers)
  - h. Number of licenses supported (if applicable)

#### Admissions Application

- 1) Online application: easy to customize form-application with the following functionality: secure login, logic-based questions.
- 2) Develop customizable online admissions application/forms which feed directly into the solution.
- 3) Option to begin an application and return to it later for completion.
- 4) Application should utilize dynamic conditional logic questions/sections displaying data based on constituent's responses and allow for help text in input field.
- 5) Allow validation logic on fields as needed (ie. Date of birth fields, phone number formats, etc.)
- 6) Application should have address validation built into the address fields. (High interest in functionality for domestic and international applicants)
- 7) Upload multiple, large documents into the application. (Prior to application submission if possible.)
- 8) Import/capture data from multiple sources: SAT/ACT test score loads, GRE/GMAT, purchased names, Common App, manual prospect card entry, self-generated prospect entry via the web, etc.
- 9) Provide secure payment services functionality to charge an application fee (or waive the fee) via various forms of payment.
- 10) Allow international payment transaction.

- 11) Provide a sample screen shot(s) of admissions application highlighting any of the above noted functionalities.
- 12) Ability for applicants to upload video and audio submission (portfolios, video auditions, etc.)
- 13) Application, including payment and document functions, need to be browser agnostic and mobile friendly.
- 14) Sandbox/testing environment for testing changes, upgrades, and troubleshooting production issues.
- 15) Provide solutions for detecting fraudulent applications within the CRM or payment system.

#### **Applicant Portal**

- 1) Customizable, branded, self-service interface (portal, webpage, etc.) that features an online application, admitted student checklist, and capability to view awards and scholarships.
- 2) Constituents must have the ability to log into interface and review application status (including required application materials, received materials, admission decision, next steps), all of which are updated in real-time.
- 3) Interface must be optimized for viewing on mobile devices.
- 4) Tracking and connecting multiple applications in multiple terms.
- 5) Provide a sample screen shot(s) of applicant portal experience highlighting any of the above noted functionalities.
- 6) Option to display video content to applicants (i.e., message from the dean, instructional videos)
- 7) Ability for applicants to submit an application without payment (i.e., select qualify for fee waiver, etc.)
- 8) Allow for applicant to make payment for application or subsequent fees and submit documents after application is submitted/complete.
- 9) Notification alerts for staff when new documents have been uploaded and are available for review.
- 10) Allow for the applicant to provide response to posted questions like acceptance of offers, provide ability to indicate need for change of term or campus or honors related questionnaire.
- 11) Provide an option for stakeholders (high school counselors, international agents, etc.) to view progress of applications and identify missing materials and other requirements.

#### **Administrative Interface**

- 1) Dynamic, user-friendly dashboard, providing users with the ability to customize appearance to include tools such as: custom analytics, recent reports, recent/saved searches and records, applications ready for review, upcoming meetings etc. specific to the user.
- 2) Store and search name and contact information for constituents as well as key admission information (i.e. test scores, supporting documentation, GPA, etc.) and interests (majors, minors, academic, clubs, organizations, sports, activities, etc.).
- 3) Configurable system with customizable workflows and triggers to enable the automation of activities based on logic and activity data, including the assignment of a file to a specific role based on specified criteria/activities.
- 4) Application read and review functionality supports multiple reviews and multiple decisions with workflow so batches of applications can be routed to one or more reviewers.
- 5) Ability to allocate new fields, curricular changes based on term or campus.
- 6) Reviewers must be able to submit review forms while providing ratings and overall comments on the applicant within a workflow environment.
- 7) Ability to pull real time updates from ERP/SIS.
- 8) Ability to operationalize and automate selective admission requirements on specific programs that may differ from general university programs.
- 9) Display all relevant constituent information on one screen. Deliver a display that is intuitive and easily adapted to users/recruiters workflow needs. Ease of administration to create and update forms, automated responses, hierarchies, workflow, etc.
- 10) Generate 'target lists' of constituent records in .csv or .xls format using pre- defined selection criteria. Users may create new selection criteria 'on the fly' for the generation of less common, one-off or specialized target lists.
- 11) Provide variable access to constituent's records to users based on role-based permissions.
- 12) Configurable to allow for administrative review and reassignment per evaluator workload and progress.
- 13) Allow for offline work (i.e. MSOutlook) to be re-linked and processed in tool once internet connection is re-established.

- 14) Mouse click, as well as keyboard commands for easy user navigation.
- 15) Ability to purge non-responder recruit records after appropriate time has lapsed (i.e. 3-5 years). Provide a sample screen shot(s) of administrative interface highlighting any of the above noted functionalities.
- 16) Ability for non-system users to have access to a stakeholder portal to review applicant decisions/missing docs, and upload materials based on school relationship (IE, school counselors, international agents and center, etc.)
- 17) Customizable letter generation.
- 18) Ability for operations staff to complete bulk updates for corrections or changes (ie. Curriculum changes, change school name, etc.)

**Artificial Intelligence Tools/Support**

- 1) Describe utilization of AI tools within the CRM including but not limited to administrative processes, student recruitment and communications, data analysis, and other functionality.
- 2) Provide examples of current use cases and road map ideas for development that would further enhance the efficiency and user experience with AI-assisted support.
- 3) Include a full list of AI capable features for internal and external use as each pertain to the following sections of marketing and communications, event management, data management, and reporting and analytics. These features may be reported in this section or within each section below.

**Marketing and Communications**

- 1) Build and execute comprehensive, integrated communication plans using targeted e-mails, direct mail campaigns, social media, SMS, etc. that can be tracked and analyzed. This requires rules-based, scheduled, and triggered communications.
- 2) Ability to create customized student journeys and drip campaigns where communications are triggered by student behavior and automated.
- 3) Ability to create customized non-student communication campaigns and journeys (parent communication, school counselor communications, international agents, etc.)
- 4) Ability to create custom telecounseling/telemarketing campaigns with flexible criteria and segmentation.
- 5) Provide field level validation/restriction on information capabilities (ability to set formats such as phone number, dates, etc., for consistency) and email validation checking.
- 6) Easily create and customize web forms and content that allow for adaptive display based upon logic conditions dependent on responses or when certain criteria are met (for example, a student submits an application).
- 7) All digital communications and web-based deliverables produced must be fully mobile responsive. Content, layouts, and interactive elements must automatically adapt to a range of screen sizes and devices, including smartphones and tablets, without loss of functionality, readability, or accessibility.
- 8) Establish controls by functional users to increase or decrease the amount of emails being sent by the system. We want to set limits, such as we do not want any one recipient to receive more than two communications in a single day or seven communications in a single week.
- 9) Track the effectiveness of each email sent. This would require information such as delivery rates, open (and unique open) rates, click through rates, spam complaints and unsubscribe rates.
- 10) An unsubscribe feature is automated based on Constituents opting out.
- 11) A feature for General Data Protection Regulation (GDPR) compliance.
- 12) Provide an interface to a user configurable workflow engine so that inquiries and communications requiring follow up are routed to the appropriate person or office with ability for administrator/supervisor review.
- 13) Send targeted notification to constituents regarding any required forms or responses (required applications, transcripts, immunizations, fees, test scores, references, etc.) and past actions or lack thereof, in various formats including but not limited to SMS, Text, HTML, Applicant Portal. Must have ability to track and report on these communications.
- 14) Ideally, solution allows for setting up random samples to perform A/B test to determine which email versions are most effective.
- 15) Google analytics integration.
- 16) Log all inbound and outbound calls/conversations and integrate with MS Outlook for automatic CRM storage of conversations without manual entry.

- 17) Integration, monitoring, tracking and reporting of social media interactions with varied constituents and social media networks.
- 18) Integration with existing inquiry/student search records.
- 19) Robust mechanism to handle duplicate submissions with ability to retain original source codes and inquiry dates.
- 20) System should have an easy to navigate location to view all sent communications, automatically populated regardless if message was scheduled or done ad hoc.
- 21) Please provide some examples of both electronic and hardcopy communications we can produce.

**Event Management**

- 1) Facilitate the scheduling of various events and sending of personalized event invitations, confirmations, reminders and surveys according to specified logic and in real time and automatically adjust for time zones (domestic and international).
- 2) Generate, capture, and manage online registrations, venue capacity checking, wait listing, and credit card payments in real time.
- 3) Ability to offer online webinars and individual online appointments without using third-party software.
- 4) Support efficient check-in processes using QR codes and location-aware links for registered guests to check themselves in once they are near the venue or allow KSU staff to scan QR codes.
- 5) Measure event success and drive follow up actions: maximize event success by leveraging surveys for retention, automated lead creation for recruiting, and out-of-the-box metrics for event analysis.
- 6) Ability to send automated multi-channel communications through SMS, print, or email.
- 7) Ability for KSU staff to create individual appointments, interviews, or other one-on-one events that can be sent to prospective constituents to register.
- 8) Integration with Google Maps, Zoom, and Calendars (such as Outlook, Google Calendars, iCalendar).
- 9) Ability to differentiate between something that is public-facing therefore containing a public webpage registration, versus something that is private therefore not public facing requiring an invitation or staff registration.
- 10) Ability to differentiate between campuses/admitting units when scheduling events.

**Data Management**

- 1) Recognize and prioritize constituents' multiple addresses (permanent, temporary, etc.), phone numbers (permanent home, parent/guardian, cell, emergency contact, residential hall, etc.), contacts (such as parents, college counselors, etc.) and email addresses (student personal, KSU email, parent, etc.) on an individual record.
- 2) System must maintain source code history for analytics and data mining purposes.
- 3) Ability for bi-directional data integration from CRM to SIS and back again. Ability to create custom data tables for related data.
- 4) Ability to upload/manage additional person datasets, such as school counselors, principals, and KSU staff.
- 5) Ability to manage accurate CEEB-based school lists for high schools and colleges including current addresses and institutional details.
- 6) Assign a unique identifier to each constituent with search match (both manual and automated) functionality to identify existing records.
- 7) Search/match/resolve duplicate identities and take corrective action on work and communication flows.
- 8) Record individualized information about constituents in a searchable free-form field.
- 9) Upload inquiry/search name records in batch (supports CSV, Excel, etc. formats).
- 10) Import and export data (including historical data – at least 5 years) in a variety of input and output formats.
- 11) Read data (such as ACT scores) from standard third parties.
- 12) All changes to data must be auditable by user, date and time.
- 13) Assign inquiries and applicants to admission counselors based on set criteria.
- 14) Allow and track connections between students/parents/counselors, etc. for easy relationship understanding and management.
- 15) Secure, integrated location for data and document file storage used for import/export functions.

**Reporting/Analytics**

- 1) User-friendly, intuitive reporting environment with dashboards, visual funnels, etc. that allows easy access to view data and create, revise, and save ad hoc reports with a minimum amount of training. List standard reports and explain how ad-hoc reports can be created including any required client software.
- 2) Offer a query tool that provides real-time data access that is easy to use for nontechnical end users. Users can access pre-defined criteria, pre-formatted reports or customizable reports, including specific values, ranges, conditions and fields within the solution, allowing for accurate and consistent formatting.
- 3) Export data and reports in multiple formats (Excel, csv, etc.) and for standard reports to be created, scheduled, and emailed to specified recipients, regardless if they are a system user or not. Provide a mechanism to schedule, run, and produce reports in batch mode at future dates.
- 4) The solution provides statistical analyses of marketing, communication and event campaigns including metrics such as incoming/outgoing communications, open rates, click through data, yield management, event attendance, etc.
- 5) Offer real-time reporting to accurately track demographics and assign constituents to target groups accordingly. Track migration history from one target group to another.
- 6) Develop and/or use predictive modeling tools within the software.
- 7) Provide cost benefit analysis reports to assist in determining the most cost-effective marketing, event, and communications campaigns.
- 8) Provide activity histories for each constituent to measure engagement levels; reports should be based on key metrics, which can be determined by the user.
- 9) Run reports on functional users' activities and productivity.
- 10) Define compatibility with existing ODS and Cognos reporting to determine whether reporting requirements can be met through combination of existing and new tool; or in fact must remain separate.
- 11) Reports or field/data usage need to have ability for security controls to prevent certain data from being used or displayed unless elevated permissions are granted.
- 12) Need to have report folder structure for easy maintenance and end-user navigation.
- 13) Secure method of distributing reports to users not using the CRM or built dashboard/folder.
- 14) Provide a sample screen shot(s) of reporting/analytics highlighting any of the above noted functionalities.

**Technology**

- 1) Seamless import and export of data to/from Ellucian Banner, CashNet, and/or other vendor software/interfaces. Should allow for both batch and automated import of data.
- 2) In addition to batch data import/update, does your system support API-based incremental updates? For example, if a student completes an action in an external system, can your API receive that notification and trigger communication accordingly?
- 3) Conversion of historical/existing inquiry/search records from current CRM to solution. Provide a data conversion plan that establishes the conversion environment and outlines strategies for both the automated and, if necessary, manual conversion of data for the proposed solution.
- 4) Map existing inquiry and student search records for specified admit terms from current CRM to solution.
- 5) Must utilize best practices related to spam filters, blacklisting/whitelisting policies, and privacy laws to ensure messages are compliant and follow legislation to have the best possible chance of being successfully delivered to and read by contacts.
- 6) Provide access and functionality based on user-defined roles.
- 7) Provide a test/development and production instances of the CRM solution.
- 8) Vendor is responsible for installing patches, updates and releases and provide details about the change management process.
- 9) Add fields and tables to the database for local needs.
- 10) Vendor and/or client to monitor system performance.
- 11) Manually and/or automatically purge and/or archive student records based upon business rules and policies of the University.
- 12) Provide future access to archived records.
- 13) Explain the proposed solution's uptime, scheduled downtimes, and service level commitments.
  - a. System must be available for use virtually full-time. Offeror should provide statistics as to the actual uptime of the system and specify how these numbers were measured.

- b. On those rare occasions when the system has to be taken down, describe any indicator (other than no response) given to the user to notify them that the system is down and the anticipated time for its return to operability.
  - c. Itemize all circumstances in which the system is to be taken down for planned and scheduled work. Specify anticipated downtime for each of these circumstances.
  - d. Describe the system functionality during downtime or other times when network traffic is blocked between endpoints. Describe what can users and system administrators expect during the downtime.
- 14) Is your solution web-based (HTTP or HTTPS)? Provide a comprehensive list of supported web browsers and computing platforms and if applicable any other detailed requirements for the web browser.
  - 15) Are there specialized components of your product that must be installed on the Kent State University's computing infrastructure – e.g. personal computers, servers, etc.?
  - 16) Describe in detail the account maintenance, authentication, and authorization mechanisms.
  - 17) Describe your product's ability to support a single sign-on for our employees and applicants from our campus portal (Ellucian).
  - 18) The database must be capable of managing 5,000,000 contact records and their associated transactions.
  - 19) Describe any data/document/storage limits.
  - 20) Customizations must be preserved during/after upgrades.
  - 21) Provide functionality to customize permissions/roles related to viewing records, updating records, running queries, exporting lists, etc.
  - 22) Provide details about test environment/sandbox options available to test new features, functionality, integration processes, etc.
  - 23) All functions (administrative interface, application, portal, event registration) should be mobile and browser friendly.
  - 24) Provide a VPAT (Voluntary Product Accessibility Template) for review.
  - 25) Provide a HECVAT (Higher Education Cloud Vendor Assessment Tool) for review.
  - 26) Provide a data protection plan for Kent State data housed in the vendor cloud, including how/if data is shared.
  - 27) Provide an exit strategy plan that demonstrates policy on retaining, extracting, purging, use of Kent State data; demonstrate details in contract verbiage.

### **Implementation, Training, and Ongoing Support**

- 1) Describe your recommended implementation strategy, best practice consulting options, and professional services. This must include the proposed implementation plan and schedule, timeline, and onsite support provided by vendor. Indicate in terms of on-site and on-call, the support personnel that will be made available to install and implement the proposed solution. Please highlight additional costs, including contractor or training support beyond levels quoted in this response (including any travel costs).
- 2) The University's goal is to implement the solution by July 1, 2026. A detailed timeline for implementing your solution is required. Describe University and vendor roles and responsibilities and time commitments recommended for training. Provide a projected timeline or calendar identifying milestones and deliverables.
- 3) Describe your recommendations regarding the University's requirements (tasks, personnel and cost related) for the conversion and implementation effort.
- 4) Describe any readiness assessment and business process analysis services you provide.
- 5) Describe the recommended approach for conversion or migration of existing data.
- 6) Describe what customer technical services are provided as part of the solution's basic license and maintenance fees and what additional cost services are available.
- 7) Describe the various support functions (consulting, program development, exit user routines, customizations, etc.) that you offer clients to maximize or leverage the features/functionality of the solution, both during and after implementation.
- 8) Identify any third-party vendors involved in your implementation strategy and describe these relationships. Indicate whether these relationships are required or optional for implementation of the proposed solution. Describe associated costs and requirements related to the third-party vendor.
- 9) Describe the training options (on-site, online instructor led, online self-help, documentation, etc.) available in support of this solution and implementation. Describe training for functional and technical users.

- 10) Describe your post-implementation customer support model including any priority system to provide for urgent support, hours of operation, location of support services, methods of support (ticket, phone, chat, etc.) and any planned changes to this model.
  - a. The offeror's customer support personnel must be full-time, company-employed customer service professionals. These professionals must be dedicated to specific accounts for relationship building and trained specifically to support the needs of their respective vertical.
  - b. The offeror must provide assurance that they do not outsource customer support.
  - c. The offeror must have redundant customer care support available across multiple time zones and locations.
  - d. Upgrades, updates, and enhancements must be provided free of charge, and offeror must detail its protocol for seamlessly rolling out upgrades, updates, and enhancements into the existing system after extensive internal quality assurance testing.
  - e. The offeror must document how their support staff is hired, educated, and trained to support the specific needs of Higher Education Institutions.
- 11) Provide a defined product roadmap for any planned upgrades/enhancements.

### **FINANCIAL PROPOSAL**

Provide pricing as described in proposal and required above. Include a separate document for pricing if necessary, consistent with the format here presented. Kent State University expects that all costs are included in the overall prices proposed, and that there will be no additional expenses billed to the University for any reason.

*(End of section.)*

## 7.0 DEFINITIONS

**Addendum(a):** Written instruments, issued solely by the Kent State University Procurement Department, that detail amendments, changes, modifications, or clarifications to the specifications, terms and conditions of this Request for Proposal (RFP). Such written instruments shall be the sole method employed by the Procurement Department to amend, change, modify or clarify this RFP, and any claims (from whatever source) that verbal amendments, changes, modifications or clarifications have been made shall be summarily rejected by the Procurement Department.

**Agreement, Contract, Purchase Order:** Formal award resulting from the RFP.

**DI:** “Design Innovation”

**FTE:** “Full Time Equivalent/Equivalency” or “Full Time Employment”

**HECVAT:** “Higher Education Cloud Vendor Assessment Tool Lite” (see §4.43)

**KSU:** “Kent State University”

**LMS:** “Learning Management System”

**MSA:** “Master Service(s) Agreement”

**May, Should:** Indicates something that is requested but not mandatory. If the Proposer fails to provide information, the Kent State University Procurement Department may, at its sole option, either request that the Proposer provide the information, or evaluate the Proposal without the information.

**OUA:** “Office of the University Architect”

**Proposal Closing Date:** The date and time specified in the RFP by which a sealed proposal must be received by the Kent State University Procurement Department. Proposals received after the stated date and time will not be considered.

**Proposal Issue Date:** The date and time the RFP process is opened for submission by prospective vendors.

**Proposal, Quotation:** Response provided by proposer.

**Proposer, Vendor, Carrier, Provider, Offeror:** Respondent to the RFP.

**RFP:** “Request for Proposal”

**Shall, Must, Will:** Indicates a mandatory requirement. Failure to meet mandatory requirements will invalidate the proposal, or result in the rejection of a proposal as non-responsive.

**SLA:** “Service Level Agreement”

**SOC:** “System and Organization Controls” (A series of standards designed to help measure how well a service organization conducts and regulates its information.)

**SOW:** “Statement of Work”

**SSO:** “Single Sign-On”

**VPAT:** “Voluntary Product Accessibility Template” (see §4.47)

**8.0 SAMPLE OF RESPONSE FORMS 1-9 AS FOUND IN DYNAMICFORMS**  
(FOR ILLUSTRATIVE PURPOSES ONLY.)



**Procurement Department**  
**Request for Proposal Forms**

**Form 1: Request for Proposal Attestation Form**

**Kent State University Kent Campus**

**RFP No.:** [sequential RFP number]

**RFP Description:** [RFP Title]

**Date of Issue:** [Day, Month, Date, Year]

**Proposals Due:** [Day, Month, Date, Year] **no later than 4:30 PM Eastern.**

Proposals must be received electronically through DynamicForms. No other submission method will be accepted, unless otherwise disclosed in the RFP Instructions and Specifications. The confirmation of receipt of your response must be noted as "Signed" no later than the "Proposals Due" date and time specified above. The Forms History of your DynamicForms account will also note the date and time of your proposal submission. Proposals submitted after the "Proposals Due" date and time specified above will be rejected.

Proposals are to be submitted in accordance with the RFP Instructions and Specifications. There will not be a formal proposal opening.

The Procurement Department shall at all times reserve the right to reject any or all proposals, award partial proposals, waive any proposal informalities or irregularities, and request new proposals if doing so is deemed to be in the best interests of Kent State University.

By signing this document, I am agreeing, on behalf of my firm, to the specifications of this Request for Proposal and accepting, without exception or amendment the Instructions, Agreement Terms, and Specifications as set forth in this document. Any and all Purchase Orders resulting from this Request for Proposal shall be subject to these Instructions, Agreement Terms and Specifications, as incorporated herein.

Submitted By \*   
*Company Name*

\_\_\_\_\_  
Authorized Signature                      Date

\*     \*   
*Printed Name*    *Title*

The Proposal, including all appendices, must be submitted in a single PDF file. Forms requiring signature (s) will be signed and submitted via DynamicForms within this document.

Official Proposal \*

Additional supplementary PDF documents should be attached, **only** if mandated in the Request for Proposal Instructions. In addition to its PDF file attachment, spreadsheets in .xls format must be emailed directly to Contract Manager if it is a requirement of the Request for Proposal.

Supplementary Document



## Procurement Department Request for Proposal Forms

### Form 2: Respondent Signature and Information Form

In addition to the information requested in the previous sections, please complete the following:

By signing below, Contractor represents and warrants the following:

- a. that it is not subject to an unresolved finding for recovery under ORC 9.24;
- b. that it is not under any suspension or debarment by any office of the state of Ohio or the federal government; and
- c. that it is not boycotting any jurisdiction with whom the State of Ohio can enjoy open trade, including Israel, and will not do so during the contract period.

If any of the representations and warranties set forth herein are false on the date the parties sign an Agreement resulting from this RFP, such Agreement shall be void ab initio, and the Contractor shall be required to immediately repay to the State any funds paid under any such Agreement.

|                  |   |                      |                                 |
|------------------|---|----------------------|---------------------------------|
| Payment Terms    | * | <input type="text"/> |                                 |
| Firm Name        | * | <input type="text"/> |                                 |
| Address          | * | <input type="text"/> |                                 |
| City, State, Zip | * | <input type="text"/> |                                 |
| Telephone Number | * | <input type="text"/> | Fax Number <input type="text"/> |
| Email            | * | <input type="text"/> |                                 |

|                |   |                      |      |
|----------------|---|----------------------|------|
|                |   | Authorized Signature | Date |
| Name of Signee | * | <input type="text"/> |      |
| Title          | * | <input type="text"/> |      |

\*All bids submitted are taken by the University as offers to sell by the Proposer and acceptance shall occur only by the issuance of a University purchase order or where appropriate, upon the execution of a written contract.

*Please attach a copy of the firm's W-9 or W-8 for taxpayer verification and filing purposes. This form will complete the firm's profile within the Kent State University internal vendor system.*

Taxpayer Verification Form \*



## Procurement Department Request for Proposal Forms

### Form 3: Type of Business Form: (check all applicable classifications)

- Large Business**
- Small Business** – An independently owned and operated business which, together with affiliates, has 250 or fewer employees or average annual gross receipts of \$10 million or less averaged over the previous three years. Department of Minority Business Enterprise (DMBE) certified women-owned and minority-owned business shall also be considered small business when they have received DMBE small business certification.
- Women-Owned Business** – A business concern that is at least 51% owned by one or more women who are U. S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are citizens of the United States or non-citizens who are in full compliance with the United States immigration law, and both the management and daily business operations are controlled by one or more women who are U. S. citizens or legal resident aliens.
- Minority-Owned Business** – A business concern that is at least 51% owned by one or more minority individuals or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals and both the management and daily business operations are controlled by one or more minority individuals.
- Ohio Certified MBE** (Attach Certificate)
- Ohio Certified EDGE** (Attach Certificate)
- Ohio OMSDC/NMSDC Certification** (Attach Certificate)
- Veteran-Owned Business** (Attach Certificate)
- WBENC Certification** (Attach Certificate)
- Other MBE or Women-Owned Certification** (Attach Certificate)



## Procurement Department Request for Proposal Forms

### Form 4: Buy Ohio Bidder and Product Information

**All bidders are requested to complete the following information:**

1. Is bidder an Ohio vendor?  
 Yes  No
2. Bidder qualifies as an Ohio bidder because it:
  - Is offering an Ohio product.
  - Has a significant Ohio economic presence.
  - Is located in a border state (Kentucky, Michigan, New York, Indiana or Pennsylvania) that imposes no greater restriction than contained in section 125.09 and 125.11 of the Ohio Revised Code.
3.  Bidder does not qualify as an Ohio bidder
4. All products offered in this bid are Ohio products except those listed below:





## Procurement Department Request for Proposal Forms

### Form 6: Standard Affirmation and Disclosure Form for Executive Order 2010-09S Banning the Expenditure of Public Funds on Offshore Services

**CONTRACTOR/SUBCONTRACTOR AFFIRMATION AND DISCLOSURE:** By the signature affixed to this response, the Bidder/Offeror affirms, understands and will abide by the requirements of Executive Order 2011-12K issued by Ohio Governor John R. Kasich. If awarded a contract, the Bidder/Offeror becomes the Contractor and affirms that both the Contractor and any of its subcontractors shall perform no services requested under this Contract outside of the United States. The Executive Order is available at the following website:  
(<https://www.scpd.org/sites/default/files/editor/N-002B-EO%202011-12K.pdf>).

The Bidder/Offeror shall provide all the name(s) and location(s) where services under this Contract will be performed in the spaces provided below or by attachment. Failure to provide this information as part of the response will deem the Bidder/Offeror not responsive and no further consideration will be given to the response. Bidder/Offeror's offering will not be considered. If the Bidder/Offeror will not be using subcontractors, indicate "Not Applicable" in the appropriate spaces.

**1. Principal location of business of Contractor:**

\*   
Street Address

\*   
City, State, Zip

**Name/Principal location of business of subcontractor(s):**

Name

Street Address, City, State, Zip

Name

Street Address, City, State, Zip

**2. Location where services will be performed by Contractor:**

\*   
Street Address

\*   
City, State, Zip

**Name/Location where services will be performed by subcontractor(s):**

Name

Street Address, City, State, Zip

Name

Street Address, City, State, Zip



## Procurement Department Request for Proposal Forms

**3. Location where state data will be stored, accessed, tested, maintained or backed-up, by Contractor:**

\*   
*Street Address*

\*   
*City, State, Zip*

**Name/Principal location of business of subcontractor(s):**

*Name*

*Street Address, City, State, Zip*

**4. Location where services to be performed will be changed or shifted by Contractor:**

\*   
*Street Address*

\*   
*City, State, Zip*

**Name/Location(s) where services will be changed or shifted to be performed by subcontractor(s):**

*Name*

*Street Address, City, State, Zip*



## Procurement Department Request for Proposal Forms

### Form 7: Electronic Information Technology (“EIT”) Compliance Form

- I have completed Section Electronic Information Technology (“EIT”) Compliance section of the RFP and submitted all the required documents

**Electronic Information Technology (“EIT”) Compliance:** If the proposed product or service is an Electronic Information Technology (“EIT”) product or service as such products or services are defined below in this Section, then your proposal must include a response to this section so the proposed product or service can be evaluated by University personnel for compliance with the University Policy 4-16.

“EIT” product(s) and/or service(s) include, but are not limited to, systems and application software (including mobile), online services such as learning management systems, content management systems, access portals, online marketing solutions, websites, web content and multimedia, digital materials (video, audio, etext, ebooks, lab simulations), telecommunications, and self-contained products such as displays, kiosks, touchscreens, operable controls (key carded door openers), and personal response systems.

If the proposed product or service is not an EIT product or service, consider this section complete.

Pursuant to University Policy 4-16, Kent State University is committed to ensuring that its electronic and information technologies, including but not limited to, all information provided through university and thirdparty websites, online learning and course management systems, and curriculum, institutional and administrative data systems: (a) provide equal opportunity to the educational benefits and opportunities afforded by the technology; (b) provide equal treatment in the use of such technology; and (c) be accessible to individuals with disabilities in compliance with Section 504 of the Rehabilitation act of 1973, as amended and the Americans with Disabilities Act of 1990, as amended (ADA-AA) and other applicable laws of the State of Ohio.

**Requirements for Vendors submitting a proposal for an “EIT” product and/or service:** Provide information about the digital accessibility of proposed product(s) and/or services(s). This process is handled via an online form. Please carefully read the instructions below:

- a. In a web browser, visit [bit.ly/eitvendorsurvey](http://bit.ly/eitvendorsurvey). The form should be completed by Vendor’s **lead technical staff member** best suited to share information about the digital accessibility of the product and/or service.
  - i. PLEASE DO NOT START FORM until [previewing of the list of questions](#) that will be asked.
  - ii. If available, please make sure to attach a completed VPAT when completing the form. A blank template of the VPAT is available at [www.itic.org/policy/accessibility](http://www.itic.org/policy/accessibility).
  - iii. NOTE: KSU may, in its sole discretion, deem as non-responsive, any form submission that is deemed by the university as incomplete.

- I am not required to complete Section 4.49 Electronic Information Technology (“EIT”) Compliance section of the RFP.



## Procurement Department Request for Proposal Forms

### Form 8: Data Security Requirements/PCI Compliance Form

Will this product or service have involvement in creating, storing, processing, transmitting, or accessing University data or handling financial transactions?

If yes, will any data be removed by, accessed from, copied to, or created within systems that do not reside within the geographical boundaries of Kent State University?

If yes, complete the appendage titled "Security Questionnaire for External Service Providers". Include a copy of any applicable audit or security assessment reports or certifications such as: SAS 70 or its replacement SSAE 16, SOC 2, or ISO 27001 and include copies of any applicable corporate information security policies or other supporting documentation that will substantiate the questionnaire responses.

- \*  I have completed Section Data Security Requirements/PCI Compliance section of the RFP and submitted all the required documents.
- I am not required to complete Section Data Security Requirements/PCI Compliance section of the RFP.



**Procurement Department**  
**Request for Proposal Forms**

**Form 9: Electronic Invoicing and Payment Capability Form**

All bidders are required to complete the following information:

Does your company offer electronic invoicing?

\*  Yes  No

Is your company capable of receiving payment via ACH transfer?

\*  Yes  No

Signature \_\_\_\_\_

Date: \_\_\_\_\_

*(End of document.)*