



Procurement Review Comprehensive Checklist
Procurement Services Division
This form must accompany all Purchase Order Requisitions

SECTION 1: DESCRIPTION

General Tracking		Contract Terms	
FILE ID#: 26-2157	RFP, BID, QUOTE OR RENEWAL #: 26-048-WIOA	INITIAL TERM WITH RENEWALS: 1 YR + 3 X 1 YR TERM PERIODS	INITIAL TERM TOTAL COST: \$12,500.00
COMMITTEE: ECONOMIC DEVELOPMENT	TARGET COMMITTEE DATE: 08/18/2026	PROMPT FOR RENEWAL:	CONTRACT TOTAL COST WITH ALL RENEWALS: \$39,500.00
	CURRENT TERM TOTAL COST: \$12,500.00	MAX LENGTH WITH ALL RENEWALS: FOUR YEARS	CURRENT TERM PERIOD: INITIAL TERM
Vendor Information		Department Information	
VENDOR: Executive Pulse	VENDOR #: 48590	DEPT: Workforce Development	DEPT CONTACT NAME: Amy Everett
VENDOR CONTACT: Sean Michaels	VENDOR CONTACT PHONE: 866-397-8573	DEPT CONTACT PHONE #: 630-955-2045	DEPT CONTACT EMAIL: aeverett@worknetdupage.org
VENDOR CONTACT EMAIL: smichaels@e-pulse.net	VENDOR WEBSITE: executivepulse.com	DEPT REQ #:	
Overview			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Per lowest responsible bid, RFP 26-048-WIOA.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished A CRM Platform License for Workforce Development and Business Services including an annual subscription with 6 named users, all modules, full technical support, hosting, maintenance, and all platform upgrades. Will allow for employer engagement and continuity, with outcome tracking and grantor reporting.			

SECTION 2: DECISION MEMO REQUIREMENTS

DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required.
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.
RFP (REQUEST FOR PROPOSAL)	

SECTION 3: DECISION MEMO

SOURCE SELECTION	Describe method used to select source. RFP #26-048-WIOA
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action). 1 – Do Not Proceed with a New CRM Solution 2 – Select a Different Vendor from the RFP The Workforce Development Division recommends proceeding with Executive Pulse based on its strong alignment with the Division's requirements, competitive pricing, and overall value. The solution represents a significant improvement over the current free HubSpot platform and will improve staff efficiency while strengthening the Employer Partnerships team's ability to support local workforce and economic development efforts.

SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION	
JUSTIFICATION Select an item from the following dropdown menu to justify why this is a sole source procurement.	
NECESSITY AND UNIQUE FEATURES	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
MARKET TESTING	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
AVAILABILITY	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

SECTION 5: Purchase Requisition Information			
<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: Executive Pulse	Vendor#: 48590	Dept: WDD-HR	Division: Workforce Development
Attn: Sean Michaels	Email: smichaels@e-pulse.net	Attn: Amy Everett	Email: aeverett@worknetdupage.org
Address: 155 E. 10th Street	City: Erie	Address: 2525 Cabot Dr, Suite 302	City: Lisle
State: Pennsylvania	Zip: 16501	State: IL	Zip: 60532
Phone: 866-397-8573	Fax:	Phone: 630-955-2045	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Executive Pulse	Vendor#:	Dept: WDD-HR	Division: Workforce Development
Attn: Sean Michaels	Email: smichaels@e-pulse.net	Attn: Amy Everett	Email: aeverett@worknetdupage.org
Address: 155 E. 10th Street	City: Erie	Address: 2525 Cabot Dr, Suite 302	City: Lisle
State: Pennsylvania	Zip: 16501	State: IL	Zip: 60532
Phone: 866-397-8573	Fax:	Phone: 630-955-2045	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Sep 1, 2026	Contract End Date (PO25): Aug 31, 2027

Purchase Requisition Line Details											
LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/ Activity Code	Unit Price	Extension
1	1	EA		CRM Data Base	FY26	5000	2840		25-681006	12,500.00	12,500.00
<i>FY is required, ensure the correct FY is selected.</i>										Requisition Total	\$ 12,500.00

Comments	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.