

TIPS VENDOR AGREEMENT

Between Vertosoft LLC and
(Company Name)

THE INTERLOCAL PURCHASING SYSTEM (TIPS),
a Department of Texas Education Service Center Region 8 for
TIPS RFP 200105 Technology Solutions, Products and Services

General Information

The Vendor Agreement ("Agreement") made and entered into by and between The Interlocal Purchasing System (hereinafter referred to as "TIPS" respectfully) a government cooperative purchasing program authorized by the Region 8 Education Service Center, having its principal place of business at 4845 US Hwy 271 North, Pittsburg, Texas 75686. This Agreement consists of the provisions set forth below, including provisions of all Attachments referenced herein. In the event of a conflict between the provisions set forth below and those contained in any Attachment, the provisions set forth shall control unless otherwise agreed by the parties in writing and by signature and date on the attachment.

A Purchase Order, Agreement or Contract is the TIPS Member's approval providing the authority to proceed with the negotiated delivery order under the Agreement. Special terms and conditions as agreed between the Vendor and TIPS Member should be added as addendums to the Purchase Order, Agreement or Contract. Items such as certificate of insurance, bonding requirements, small or disadvantaged business goals are some, but not all, of the addendums possible.

Terms and Conditions

Freight

All quotes to members shall provide a line item for cost for freight or shipping regardless if there is a charge or not. If no charge for freight or shipping, indicate by stating "No Charge" or "\$0", "included in price" or other similar indication. Otherwise, all shipping, freight or delivery changes shall be passed through to the TIPS Member at cost with no markup and said charges shall be agreed by the TIPS Member unless alternative shipping terms are agreed by TIPS as a result of the proposal award.

Warranty Conditions

All new supplies equipment and services shall include manufacturer's minimum standard warranty unless otherwise agreed to in writing. Vendor shall be legally permitted to sell all products offered for sale to TIPS Members if the offering is included in the Request for Proposal category. All goods proposed and sold shall be new unless clearly stated in writing.

Customer Support

The Vendor shall provide timely and accurate customer support for orders to TIPS Members as agreed by the Parties. Vendors shall respond to such requests within a commercially reasonable time after receipt of the request. If support and/or training is a line item sold or packaged with a sale, support shall be as agreed with the TIPS Member.

Agreements

Agreements for purchase will normally be put into effect by means of a purchase order(s) executed by authorized agents of the TIPS Member participating government entities, but other means of placing an order may be used at the Member's discretion.

Tax exempt status

Most TIPS Members are tax exempt and the related laws and/or regulations of the controlling jurisdiction(s) of the TIPS Member shall apply.

Assignments of Agreements

No assignment of this Agreement may be made without the prior notification of TIPS. Written approval of TIPS shall not be unreasonably withheld. Payment for delivered goods and services can only be made to the awarded Vendor, Vendor designated reseller or vendor assigned company.

Disclosures

- Vendor and TIPS affirms that he/she or any authorized employees or agents has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with this Agreement.
- Vendor shall attach, in writing, a complete description of any and all relationships that might be considered a conflict of interest in doing business with the TIPS program.
- The Vendor affirms that, to the best of his/her knowledge, the offer has been arrived at independently, and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this Agreement.

Term and Renewal of Agreements

The Agreement with TIPS is for three (3) years with an option for renewal for an additional one (1) consecutive year if both parties agree. TIPS may or may not exercise the one-year extension beyond the base three-year term and whether or not to offer the extension is at the sole discretion of TIPS. The scheduled Agreement termination date shall be the last date of the month of the last month of the agreement's legal effect. **Example:** *If the agreement is scheduled to end on May 23, the anniversary date of the award, it would actually be extended to May 31 in the last month of the last year the contract is active.*

Automatic Renewal Clauses Incorporated in Awarded Vendor Agreements with TIPS Members Resulting from the Solicitation and with the Vendor Named in this Agreement.

No Agreement for goods or services with a TIPS Member by the awarded vendor named in this Agreement that results from the solicitation award named in this Agreement, may incorporate an automatic renewal clause that exceeds month to month terms with which the TIPS Member must comply. All renewal terms incorporated in an Agreement by the vendor with the TIPS Member shall only be valid and enforceable when the vendor receives written confirmation by purchase order, executed Agreement or other written instruction issued by the TIPS Member for any renewal period. The purpose of this clause is to avoid a TIPS Member inadvertently renewing an Agreement during a period in which the governing body of the TIPS Member has not properly appropriated and budgeted the funds to satisfy the Agreement renewal. This term is not negotiable and any Agreement between a TIPS Member and a TIPS awarded vendor with an automatic renewal clause that conflicts with these terms is rendered void and unenforceable.

Shipments

The Vendor shall ship, deliver or provide ordered products or services within a commercially reasonable time after the receipt of the order from the TIPS Member. If a delay in said delivery is anticipated, the

Vendor shall notify TIPS Member as to why delivery is delayed and shall provide an estimated time for completion of the order. TIPS or the requesting entity may cancel the order if estimated delivery time is not acceptable or not as agreed by the parties.

Invoices

Each invoice or pay request shall include the TIPS Member's purchase order number or other identifying designation as provided in the order by the TIPS Member. If applicable, the shipment tracking number or pertinent information for verification of TIPS Member receipt shall be made available upon request.

Payments

The TIPS Member will make payments directly to the Vendor, the vendor assigned dealer or as agreed by the Vendor and the TIPS Member after receiving invoice and in compliance with applicable payment statute(s), whichever is the greater time or as otherwise provided by an agreement of the parties.

Pricing

Price increases will be honored according to the terms of the solicitation. All pricing submitted to TIPS shall include the participation fee, as provided in the solicitation, to be remitted to TIPS by the Vendor. Vendor will not show adding the fee to the invoice presented to TIPS Member customer.

Participation Fees and Reporting of Sales to TIPS by Vendor

The Participation Fee that was published as part of the Solicitation and the fee published is the legally effective fee, along with any fee conditions stated in the RFP. Collection of the fees by TIPS is required under Texas Government Code §791.011 Et seq. Vendor or vendor assigned dealer agrees to pay the participation fee for all Agreement sales to TIPS on a monthly scheduled report or as otherwise agreed by the parties.

Reporting of Sales to TIPS by Vendor

Vendor is required to report all sales under the TIPS contract to TIPS. If the TIPS Member entity requesting a price from the awarded Vendor requests the TIPS contract, Vendor must include the TIPS Contract number on any communications with the TIPS Member entity. To report sales, login to the TIPS Vendor Portal and click on the PO's and Payments tab. Pages 3-7 of the Vendor Portal User Guide will walk you through the process of reporting sales to TIPS. Please refer to the TIPS Accounting FAQ's for more information about reporting sales and if you have further questions, contact the Accounting Team at accounting@tips-usa.com. The Vendor or vendor assigned dealers are responsible for keeping record of all sales that go through the TIPS Agreement and submitting same to TIPS. Failure to render the participation fee to TIPS shall constitute a breach of this agreement with our parent governmental entity, Texas Education Service Center Region 8, as established by the Texas legislature and shall be grounds for termination of this agreement and any other agreement held with TIPS and possible legal action. TIPS reserves all rights under the law to collect the fees due. Please contact TIPS at tips@tips-usa.com or call (866) 839-8477 if you have questions about paying fees.

Indemnity

The Vendor agrees to indemnify and hold harmless and defend TIPS, TIPS Member(s), officers and employees from and against all claims and suits by third parties for damages, injuries to persons (including death), property damages, losses, and expenses including court costs and reasonable attorney's fees, arising out of, or resulting from, Vendor's performance under this Agreement, including all such causes of action based upon common, constitutional, or statutory law, or based in whole or in part, upon allegations of negligent or intentional acts on the part of the Vendor, its officers, employees, agents, subcontractors, licensees, or invitees. Parties found liable shall pay their proportionate share of damages as agreed by the parties or as ordered by a court of competent jurisdiction over the case. **NO LIMITATION OF LIABILITY FOR DAMAGES FOR**

PERSONAL INJURY OR PROPERTY DAMAGE ARE PERMITTED OR AGREED BY TIPS/ESC REGION 8. Per Texas Education Code §44.032(f), and pursuant to its requirements only, reasonable Attorney's fees are recoverable by the prevailing party in any dispute resulting in litigation.

State of Texas Franchise Tax

By signature hereon, the bidder hereby certifies that he/she is not currently delinquent in the payment of any franchise taxes owed the State of Texas under Chapter 171, Tax Code.

Miscellaneous

The Vendor acknowledges and agrees that continued participation in TIPS is subject to TIPS sole discretion and that any Vendor may be removed from the participation in the Program at any time with or without cause. Nothing in the Agreement or in any other communication between TIPS and the Vendor may be construed as a guarantee that TIPS or TIPS Members will submit any orders at any time. TIPS reserves the right to request additional proposals for items or services already on Agreement at any time.

Purchase Order Pricing/Product Deviation

If a deviation of pricing/product on a purchase order or contract modification occurs between the Vendor and the TIPS Member, TIPS must be notified within five (5) business days of receipt of change order.

Termination for Convenience of TIPS Agreement Only

TIPS reserves the right to terminate this agreement for cause or no cause for convenience with a thirty (30) days prior written notice. Termination for convenience is conditionally required under Federal Regulations 2 CFR part 200 if the customer is using federal funds for the procurement. All purchase orders presented to the Vendor, but not fulfilled by the Vendor, by a TIPS Member prior to the actual termination of this agreement shall be honored at the option of the TIPS Member. The awarded vendor may terminate the agreement with ninety (90) days prior written notice to TIPS 4845 US Hwy North, Pittsburg, Texas 75686. The vendor will be paid for goods and services delivered prior to the termination provided that the goods and services were delivered in accordance with the terms and conditions of the terminated agreement. This termination clause does not affect the sales agreements executed by the Vendor and the TIPS Member customer pursuant to this agreement. TIPS Members may negotiate a termination for convenience clause that meets the needs of the transaction based on applicable factors, such as funding sources or other needs.

TIPS Member Purchasing Procedures

Usually, purchase orders or their equal are issued by participating TIPS Member to the awarded vendor and should indicate on the order that the purchase is per the applicable TIPS Agreement number. Orders are typically emailed to TIPS at tipspo@tips-usa.com.

- Awarded vendor delivers goods/services directly to the participating member.
- Awarded vendor invoices the participating TIPS Member directly.
- Awarded vendor receives payment directly from the participating member.
- Awarded vendor reports sales monthly to TIPS (unless prior arrangements have been made with TIPS for an alternative submission schedule).

Licenses

Awarded vendor shall maintain, in current status, all federal, state and local licenses, bonds and permits required for the operation of the business conducted by awarded vendor. Awarded vendor shall remain reasonably fully informed of and in compliance with all ordinances and regulations pertaining to the lawful

provision of goods or services under the Agreement. TIPS and TIPS Members reserves the right to stop work and/or cancel an order or terminate this or any other sales Agreement of any awarded vendor whose

license(s) required for performance under this Agreement have expired, lapsed, are suspended or terminated subject to a 30-day cure period unless prohibited by applicable statute or regulation.

Novation

If awarded vendor sells or transfers all assets, rights or the entire portion of the assets or rights required to perform this Agreement, a successor in interest must guarantee to perform all obligations under this Agreement. A simple change of name agreement will not change the Agreement obligations of awarded vendor. TIPS will consider Contract Assignments on a case by case basis. TIPS must be notified within five (5) business days of the transfer of assets or rights.

Site Requirements (only when applicable to service or job)

Cleanup: When performing work on site at a TIPS Member's property, awarded vendor shall clean up and remove all debris and rubbish resulting from their work as required or directed by TIPS Member or as agreed by the parties. Upon completion of work, the premises shall be left in good repair and an orderly, neat, clean and unobstructed condition.

Preparation: Awarded vendor shall not begin a project for which TIPS Member has not prepared the site, unless awarded vendor does the preparation work at no cost, or until TIPS Member includes the cost of site preparation in a purchase order.

Site preparation includes, but is not limited to: moving furniture, installing wiring for networks or power, and similar pre-installation requirements.

Registered sex offender restrictions: For work to be performed at schools, awarded vendor agrees that no employee of a sub-contractor who has been adjudicated to be a registered sex offender will perform work at any time when students are, or reasonably expected to be, present unless otherwise agreed by the TIPS Member. Awarded vendor agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the purchase order at the TIPS Member's discretion.

Awarded vendor must identify any additional costs associated with compliance of this term. If no costs are specified, compliance with this term will be provided at no additional charge. **Safety measures:** Awarded vendor shall take all reasonable precautions for the safety of employees on the worksite, and shall erect and properly maintain all necessary safeguards for protection of workers and the public. Awarded vendor shall post warning signs against all hazards created by the operation and work in progress. Proper precautions shall be taken pursuant to state law and standard practices to protect workers, general public and existing structures from injury or damage.

Smoking

Persons working under Agreement shall adhere to the TIPS Member's or local smoking statutes, codes or policies.

Marketing

Awarded vendor agrees to allow TIPS to use their name and logo within TIPS website, marketing materials and advertisement subject to any reasonable restrictions provided to TIPS in the Proposal to the Solicitation. The Vendor may submit an acceptable use directive for Vendor's names and logos with which TIPS agrees to comply. Any use of TIPS name and logo or any form of publicity, inclusive of press release, regarding this Agreement by awarded vendor must have prior approval from TIPS which will not be unreasonably withheld. Request may be made by email to TIPS@TIPS-USA.COM

Supplemental Agreements

The TIPS Member entity participating in the TIPS Agreement and awarded vendor may enter into a separate Supplemental Agreement or contract to further define the level of service requirements over and above the minimum defined in this Agreement such as but not limited to, invoice requirements, ordering requirements, specialized delivery, etc. Any Supplemental Agreement or contract developed as a result of this Agreement is

exclusively between the TIPS Member entity customer and the Vendor. TIPS, its agents, TIPS Members and employees not a party to the Supplemental Agreement with the TIPS Member customer, shall not be made party to any claim for breach of such agreement unless named and agreed by the Party in question in writing in the agreement. If a Vendor submitting a Proposal requires TIPS and/or TIPS Member to sign an additional agreement, those agreements shall comply with the award made by TIPS to the Vendor. Supplemental Vendor's Agreement documents may not become part of TIPS's Agreement with vendor unless and until an authorized representative of TIPS reviews and approves it. TIPS review and approval may be at any time during the life of this Vendor Agreement. TIPS permits TIPS Members to negotiate additional terms and conditions with the Vendor for the provision of goods or services under the Vendor's TIPS Agreement so long as they do not materially conflict with this Agreement.

Survival Clause

All applicable sales, leases, Supplemental Agreements, contracts, software license agreements, warranties or service agreements that were entered into between Vendor and TIPS or the TIPS Member Customer under the terms and conditions of this Agreement shall survive the expiration or termination of this Agreement. All Orders, Purchase Orders issued or contracts executed by TIPS or a TIPS Member and accepted by the Vendor prior to the expiration or termination of this agreement, shall survive expiration or termination of the Agreement, subject to previously agreed terms and conditions agreed by the parties or as otherwise specified herein relating to termination of this agreement.

Legal obligations

It is the responding Vendor's responsibility to be aware of and comply with all local, state and federal laws governing the sale of products/services identified in the applicable Solicitation that resulted in this Vendor Agreement and any awarded Agreement thereof. Applicable laws and regulations must be followed even if not specifically identified herein.

Audit rights

Due to transparency statutes and public accountability requirements of TIPS and TIPS Members', the awarded Vendor shall, at their sole expense, maintain appropriate due diligence of all purchases made by TIPS Member that utilizes this Agreement. TIPS and Region 8 ESC each reserve the right to audit the accounting of TIPS related purchases for a period of three (3) years from the time such purchases are made. This audit right shall survive termination of this Agreement for a period of one (1) year from the effective date of termination. In order to ensure and confirm compliance with this agreement, TIPS shall have authority to conduct audits of Awarded Vendor's pricing or TIPS transaction documentation with TIPS Members with 30 days' notice unless the audit is ordered by a Court Order or by a Government Agency with authority to do so without notice. Notwithstanding the foregoing, in the event that TIPS is made aware of any pricing being offered to eligible entities that is materially inconsistent with the pricing under this agreement, TIPS shall have the ability to conduct the audit internally or may engage a third- party auditing firm to investigate any possible non-compliant conduct or may terminate the Agreement according to the terms of this Agreement. In the event of an audit, the requested materials shall be reasonably provided in the time, format and at the location acceptable to Region 8 ESC or TIPS. TIPS agrees not to perform a random audit the TIPS transaction documentation more than once per calendar year, but reserves the right to audit for just cause or as required by any governmental agency or court with regulatory authority over TIPS or the TIPS Member.

Force Majeure

If by reason of Force Majeure, either party hereto shall be rendered unable wholly or in part to carry out its obligations under this Agreement then such party shall give notice and full particulars of Force Majeure in writing to the other party within a reasonable time after occurrence of the event or cause relied upon, and the obligation of the party giving such notice, so far as it is affected by such Force Majeure, shall be suspended during the continuance of the inability then claimed, except as hereinafter provided, but for no longer period,

and such party shall endeavor to remove or overcome such inability with all reasonable dispatch.

Choice of Law

The Agreement between the Vendor and TIPS/ESC Region 8 and any addenda or other additions resulting from this procurement process, however described, shall be governed by, construed and enforced in accordance with the laws of the State of Texas, regardless of any conflict of laws principles.

Venue, Jurisdiction and Service of Process

Any Proceeding arising out of or relating to this procurement process or any contract issued by TIPS resulting from or any contemplated transaction shall be brought in a court of competent jurisdiction in Camp County, Texas and each of the parties irrevocably submits to the exclusive jurisdiction of said court in any such proceeding, waives any objection it may now or hereafter have to venue or to convenience of forum, agrees that all claims in respect of the Proceeding shall be heard and determined only in any such court, and agrees not to bring any proceeding arising out of or relating to this procurement process or any contract resulting from or any contemplated transaction in any other court. The parties agree that either or both of them may file a copy of this paragraph with any court as written evidence of the knowing, voluntary and freely bargained for agreement between the parties irrevocably to waive any objections to venue or to convenience of forum. Process in any Proceeding referred to in the first sentence of this Section may be served on any party anywhere in the world.

Venue for any dispute resolution process, other than litigation, between TIPS and the Vendor shall be located in Camp or Titus County, Texas.

Project Delivery Order Procedures

The TIPS Member having approved and signed an interlocal agreement, or other TIPS Membership document, may make a request of the awarded vendor under this Agreement when the TIPS Member desires goods or services awarded to the Vendor. Notification may occur via phone, the web, courier, email, fax, or in person. Upon notification of a pending request, the awarded vendor shall acknowledge the TIPS Member's request as soon as possible, but must make contact with the TIPS Member within two working days.

Status of TIPS Members as Related to This Agreement

TIPS Members stand in the place of TIPS as related to this agreement and have the same access to the proposal information and all related documents. TIPS Members have all the same rights under the awarded Agreement as TIPS.

Vendor's Resellers as Related to This Agreement

Vendor's Named Resellers under this Agreement shall comply with all terms and conditions of this agreement and all addenda or incorporated documents. All actions related to sales by Authorized Vendor's Resellers under this Agreement are the responsibility of the Awarded Vendor. If Resellers fail to report sales to TIPS under your Agreement, the awarded Vendor is responsible for their contractual failures and shall be billed for the fees. The awarded vendor may then recover the fees from their named reseller.

Support Requirements

If there is a dispute between the awarded vendor and TIPS Member, TIPS or its representatives will assist in conflict resolution or third party if requested by either party. TIPS, or its representatives, reserves the right to inspect any project and audit the awarded Vendor's TIPS project files, documentation and correspondence related to the requesting TIPS Member's order. If there are confidentiality requirements by either party, TIPS shall comply to the extent permitted by law.

Incorporation of Solicitation

The TIPS Solicitation which resulted in this Vendor Agreement, whether a Request for Proposals, the Request for Competitive Sealed Proposals or Request for Qualifications solicitation, or other, the Vendor's response to same and all associated documents and forms made part of the solicitation process, including any addenda, are hereby incorporated by reference into this Agreement as if copied verbatim.

SECTION HEADERS OR TITLES

THE SECTION HEADERS OR TITLES WITHIN THIS DOCUMENT ARE MERELY GUIDES FOR CONVENIENCE AND ARE NOT FOR CLASSIFICATION OR LIMITING OF THE RESPONSIBILITIES OF THE PARTIES TO THIS DOCUMENT.

STATUTORY REQUIREMENTS

Texas governmental entities are prohibited from doing business with companies that fail to certify to this condition as required by Texas Government Code Sec. 2270.

By executing this agreement, you certify that you are authorized to bind the undersigned Vendor and that your company (1) does not boycott Israel; and (2) will not boycott Israel during the term of the Agreement.

You certify that your company is not listed on and does not and will not do business with companies that are on the Texas Comptroller of Public Accounts list of Designated Foreign Terrorists Organizations per Texas Gov't Code 2270.0153 found at <https://comptroller.texas.gov/purchasing/docs/foreign-terrorist.pdf>

You certify that if the certified statements above become untrue at any time during the life of this Agreement that the Vendor will notify TIPS within three (3) business day of the change by a letter on Vendor's letterhead from and signed by an authorized representative of the Vendor stating the non-compliance decision and the TIPS Agreement number and description at:

Attention: General Counsel
ESC Region 8/The Interlocal Purchasing System (TIPS)
4845 Highway 271 North
Pittsburg, TX, 75686
And by an email sent to bids@tips-usa.com

Insurance Requirements

The undersigned Vendor agrees to maintain the below minimum insurance requirements for TIPS Contract Holders.

General Liability	\$1,000,000 each Occurrence/ Aggregate Automobile
Liability	\$300,000 Includes owned, hired & non-owned
Workers' Compensation	Statutory limits for the jurisdiction in which the Vendor performs under this Agreement.
Umbrella Liability	\$1,000,000

When the contractor or its subcontractors are liable for any damages or claims, the contractors' policy, when the Vendor is responsible for the claim, must be primary over any other valid and collectible insurance carried by the District. Any immunity available to TIPS or TIPS Members shall not be used as a defense by the contractor's insurance policy. The coverages and limits are to be considered minimum requirements and in no way limit the liability of the Contractor(s). Insurance shall be written by a carrier with an A-; VII or better rating in accordance

with current A.M. Best Key Rating Guide. Only deductibles applicable to property damage are acceptable, unless proof of retention funds to cover said deductibles is provided. "Claims made" policies will not be accepted. Vendor's required minimum coverage shall not be suspended, voided, cancelled, non-renewed or reduced in coverage or in limits unless replaced by a policy that provides the minimum required coverage except after thirty (30) days prior written notice by certified mail, return receipt requested has been given to TIPS or the TIPS Member if a project or pending delivery of an order is ongoing. Upon request, certified copies of all insurance policies shall be furnished to the TIPS or the TIPS Member.

Special Terms and Conditions

- **Orders:** All vendor orders received from TIPS Members must be emailed to TIPS at tipspo@tips-usa.com. Should a TIPS Member send an order directly to the Vendor, it is the Vendor's responsibility to forward a copy of the order to TIPS at the email above within 3 business days and confirm its receipt with TIPS.
- **Vendor Encouraging Members to bypass TIPS agreement:** Encouraging TIPS Members to purchase directly from the Vendor or through another agreement, when the Member has requested using the TIPS cooperative Agreement or price, and thereby bypassing the TIPS Agreement is a violation of the terms and conditions of this Agreement and will result in removal of the Vendor from the TIPS Program.
- **Order Confirmation:** All TIPS Member Agreement orders are approved daily by TIPS and sent to vendor. The Vendor should confirm receipt of orders to the TIPS Member (customer) within 3 business days.
- **Vendor custom website for TIPS:** If Vendor is hosting a custom TIPS website, updated pricing when effective. TIPS shall be notified when prices change in accordance with the award.
- **Back Ordered Products:** If product is not expected to ship within the time provided to the TIPS member by the Vendor, customer is to be notified within 3 business days and appropriate action taken based on customer request.

The TIPS Vendor Agreement Signature Page is inserted here.

TIPS Vendor Agreement Signature Form

RFP 200105 Technology Solutions, Products and Services

Company Name Vertosoft LLC
Address 1602 Village Market Blvd. #215
City Leesburg State VA Zip 20175
Phone 571.707.4130 Fax _____
Email of Authorized Representative chet@vertosoft.com
Name of Authorized Representative Chet Hayes
Title Chief Technology Officer
Signature of Authorized Representative 
Date 02/07/2020
TIPS Authorized Representative Name Meredith Barton
Title Chief Operating Officer
TIPS Authorized Representative Signature 
Approved by ESC Region 8 
Date 5/5/2020

NOTICE TO MEMBERS REGARDING ATTRIBUTE RESPONSES

TIPS VENDORS RESPOND TO ATTRIBUTE QUESTIONS AS PART OF TIPS COMPETITIVE SOLICITATION PROCESS. THE VENDOR'S RESPONSES TO ATTRIBUTE QUESTIONS ARE INCLUDED HEREIN AS "SUPPLIER RESPONSE." PLEASE BE ADVISED THAT DEVIATIONS, IF ANY, IN VENDOR'S RESPONSE TO ATTRIBUTE QUESTIONS MAY NOT REFLECT VENDOR'S FINAL ATTRIBUTE RESPONSE, WHICH IS SUBJECT TO NEGOTIATIONS PRIOR TO AWARD. PLEASE CONTACT THE TIPS OFFICE AT 866-839-8477 WITH QUESTIONS OR CONCERNS REGARDING VENDOR ATTRIBUTE RESPONSE DEVIATIONS. PLEASE KEEP IN MIND THAT TIPS DOES NOT PROVIDE LEGAL COUNSEL TO MEMBERS. TIPS RECOMMENDS THAT YOU CONSULT YOUR LEGAL COUNSEL WHEN EXECUTING CONTRACTS WITH OR MAKING PURCHASES FROM TIPS VENDORS.



200105 Addendum 2

Vertosoft LLC

Supplier Response

Event Information

Number: 200105 Addendum 2
Title: Technology Solutions, Products and Services
Type: Request for Proposal
Issue Date: 1/9/2020
Deadline: 2/21/2020 03:00 PM (CT)

Contact Information

Contact: Kristie Collins
Address: Region 8 Education Service Center
4845 US Highway 271 North
Pittsburg, TX 75686
Phone: +1 (866) 839-8477
Fax: +1 (866) 839-8472
Email: bids@tips-usa.com

Vertosoft LLC Information

Address: 1602 Village Market Blvd SE
Suite 215
Leesburg, VA 20175
Phone: (703) 568-4703
Email: sales@vertosoft.com

By submitting your response, you certify that you are authorized to represent and bind your company.

Chet Hayes

Signature

Submitted at 2/18/2020 9:37:31 AM

chet@vertosoft.com

Email

Requested Attachments

Vendor Agreement

200105 Vendor Agreement.pdf

The vendor must download the Vendor Agreement from the attachment tab, fill in the requested information and upload the completed agreement.

DO NOT UPLOAD encrypted or password protected files.

Agreement Signature Form

200105 Agreement_Signature_Form.pdf

If you have not taken exception or deviation to the agreement language in the solicitation attributes, download the AGREEMENT SIGNATURE FORM from the "ATTACHMENTS" tab. This PDF document is a fillable form. Download the document to your computer, fill in the requested company information, print the file, SIGN the form, SCAN the completed and signed AGREEMENT SIGNATURE FORM, and upload here.

If you have taken exception to any of the agreement language and noted the exception in the deviations section of the attributes for the agreement, complete the AGREEMENT SIGNATURE FORM, but DO NOT SIGN until those deviations have been negotiated and resolved with TIPS management. Upload the unsigned form here, because this is a required document.

Pricing Spreadsheet #1

200105 Pricing_form_1.xlsx

The vendor must download the PRICING SPREADSHEET SHEET from the attachment tab, fill in the requested information and upload the completed spreadsheet.

DO NOT UPLOAD encrypted or password protected files.

Pricing Spreadsheet #2

200105 Pricing_form_2.xlsx

The vendor must download the PRICING SPREADSHEET SHEET from the attachment tab, fill in the requested information and upload the completed spreadsheet.

DO NOT UPLOAD encrypted or password protected files.

References

Reference Form.xls

The vendor must download the References spreadsheet from the attachment tab, fill in the requested information and upload the completed spreadsheet. DO NOT UPLOAD encrypted or password protected files.

Proposed Goods and Services

Vendor Product Catalogs.xlsx

Please upload one or more documents or sheets describing your offerings, line cards, catalogs, links to offerings OR list links to your offerings that illustrate the catalog of proposed lines of goods and or services you carry and offer under this proposal. It does not have to be exhaustive but should, at a minimum tell us what you are offering. It could be as simple as a sheet with your link to your online catalog of goods and services.

Resellers/Dealers - COMPLETE AND UPLOAD ONLY IF YOU HAVE RESELLER OF YOUR GOODS OR SERVICES PROPOSED *No response*

If the PROPOSING vendor has resellers that will be selling for the vendor UNDER this contract, the vendor must download the Resellers/Dealers spreadsheet from the attachment tab, fill in the requested information and upload the completed spreadsheet.

DO NOT UPLOAD encrypted or password protected files.

HUB Subcontracting Plan Form OPTIONAL

No response

Completion of the HUB Subcontracting Plan Form is OPTIONAL. THE FORM INFORMATION HAS NO EFFECT ON YOUR EVALUATION SCORE. IT IS INFORMATIONAL ONLY. Some Texas State agencies and Universities require it be a part of the file when determining if they can use a TIPS contract. If you choose to complete one, it is not project specific but the general plan the vendor would use. Complete it as best you can.

Vendor can download the HUB Subcontracting Plan Form from the "Attachments" tab and upload their HUB Subcontracting Plan Form.

D/M/WBE Certification OPTIONAL

No response

D/M/WBE Certification documentation may be scanned and uploaded if you desire to claim your status as one of the identified enterprises. (Disadvantaged Business Enterprise, Minority Business Enterprise and/or Woman Business Enterprise) If vendor has more than one certification scan into one document. (PDF Format ONLY)

DO NOT UPLOAD encrypted or password protected files.

HUB Certification OPTIONAL

No response

HUB Certification documentation may be scanned and uploaded if you desire to document your status as a HUB company. (Historically Underutilized Business) (PDF Format ONLY)

DO NOT UPLOAD encrypted or password protected files.

Warranty

No response

Warranty information (if applicable) must be scanned and uploaded. (PDF Format ONLY)

DO NOT UPLOAD encrypted or password protected files.

Supplementary

Vertosoft Response TIP 200105.pdf

Supplementary information may be scanned and uploaded. (Company information, brochures, catalogs, etc.) (PDF Format ONLY)

DO NOT UPLOAD encrypted or password protected files.

All Other Certificates

No response

All Other Certificates (if applicable) must be scanned and uploaded. If vendor has more than one other certification scan into one document. (PDF Format ONLY)

DO NOT UPLOAD encrypted or password protected files.

Logo and Other Company Marks

Vertosoft-eps.eps

If you desire, please upload your company logo to be added to your individual profile page on the TIPS website. If any particular specifications are required for use of your company logo, please upload that information under the Supplementary section or another non-required section under the "Response Attachment" tab. Preferred Logo Format: 300 x 25 px - .png, .eps, .jpeg preferred

Conflict of Interest Form CIQ- ONLY REQUIRED IF A CONFLICT EXISTS PER THE INSTRUCTIONS

No response

ONLY REQUIRED IF A CONFLICT EXISTS PER THE INSTRUCTIONS

Conflict of Interest Form for Vendors that are required to submit the form. The Conflict of Interest Form is included in the Base documents or can be found at <https://www.tips-usa.com/assets/documents/docs/CIQ.pdf>.

Certificate of Corporate Offerer - COMPLETE ONLY IF OFFERER IS A CORPORATION

No response

COMPLETE AND UPLOAD FORM IN ATTACHMENTS SECTION ONLY IF OFFERER IS A CORPORATION

Disclosure of Lobbying Activities Standard Form LLL

No response

ONLY IF you answered "I HAVE Lobbied per above" to attribute #66, please download and complete and upload the Standard Form-LLL, "disclosure Form to Report Lobbying," in the Response attachments section.

REQUIRED CONFIDENTIALITY FORM. Complete the form according to your company requirements, make any desired attachments and upload to the appropriate section under "Response Attachments" THIS FORM DETERMINES HOW ESC8/TIPS RESPONDS TO LEGAL PUBLIC INFORMATION REQUESTS.

Bid Attributes

1 Yes - No

Disadvantaged/Minority/Women Business Enterprise - D/M/WBE (Required by some participating governmental entities) Vendor certifies that their firm is a D/M/WBE? Vendor must upload proof of certification to the "Response Attachments" D/M/WBE CERTIFICATES section.

2 Yes - No

Historically Underutilized Business - HUB (Required by some participating governmental entities) Vendor certifies that their firm is a HUB as defined by the State of Texas at <https://comptroller.texas.gov/purchasing/vendor/hub/>

or in a HUBZone as defined by the US Small Business Administration at <https://www.sba.gov/offices/headquarters/ohp>

Proof of one or both may be submitted. Vendor must upload proof of certification to the "Response Attachments" HUB CERTIFICATES section.

3 Yes - No

The Vendor can provide services and/or products to all 50 US States?

4 States Served:

If answer is NO to question #3, please list which states can be served. (Example: AR, OK, TX)

5 Company and/or Product Description:

This information will appear on the TIPS website in the company profile section, if awarded a TIPS contract. (Limit 750 characters.)

Vertosoft is focused on accelerating the adoption of innovative and emerging technology within the government. Consistent with our dedication to government customers, Vertosoft has deep domain knowledge and experience supporting all phases of the government sales and acquisition life cycle. Strategic sourcing is our forte, streamlining the time required to provide critical technology and services to government end users. We provide the flexibility, agility, and responsiveness of a small company with the experience of a large organization. Vertosoft's staff is widely respected and relied upon for its professional, ethical business approach. Our success is based upon the leadership of a highly-experienced management team. Our current staff has expertise in both meeting each agency's specific requirements and, in the technology, to satisfy those needs.

6 Primary Contact Name

Primary Contact Name

7	Primary Contact Title Primary Contact Title <input style="width: 90%;" type="text" value="President"/>
8	Primary Contact Email Primary Contact Email <input style="width: 90%;" type="text" value="jay@vertosoft.com"/>
9	Primary Contact Phone Enter 10 digit phone number. (No dashes or extensions) Example: 8668398477 <input style="width: 90%;" type="text" value="703.568.4703"/>
10	Primary Contact Fax Enter 10 digit phone number. (No dashes or extensions) Example: 8668398477 <input style="width: 90%;" type="text" value="No response"/>
11	Primary Contact Mobile Enter 10 digit phone number. (No dashes or extensions) Example: 8668398477 <input style="width: 90%;" type="text" value="703.568.4703"/>
12	Secondary Contact Name Secondary Contact Name <input style="width: 90%;" type="text" value="Chet Hayes"/>
13	Secondary Contact Title Secondary Contact Title <input style="width: 90%;" type="text" value="Chief Technology Officer"/>
14	Secondary Contact Email Secondary Contact Email <input style="width: 90%;" type="text" value="chet@vertosoft.com"/>
15	Secondary Contact Phone Enter 10 digit phone number. (No dashes or extensions) Example: 8668398477 <input style="width: 90%;" type="text" value="571.707.4137"/>
16	Secondary Contact Fax Enter 10 digit phone number. (No dashes or extensions) Example: 8668398477 <input style="width: 90%;" type="text" value="No response"/>

17	Secondary Contact Mobile Enter 10 digit phone number. (No dashes or extensions) Example: 8668398477 <input type="text" value="202.596.9171"/>
18	Admin Fee Contact Name Admin Fee Contact Name. This person is responsible for paying the admin fee to TIPS. <input type="text" value="Jay Colavita"/>
19	Admin Fee Contact Email Admin Fee Contact Email <input type="text" value="jay@vertosoft.com"/>
20	Admin Fee Contact Phone Enter 10 digit phone number. (No dashes or extensions) Example: 8668398477 <input type="text" value="703.568.4703"/>
21	Purchase Order Contact Name Purchase Order Contact Name. This person is responsible for receiving Purchase Orders from TIPS. <input type="text" value="Jay Colavita"/>
22	Purchase Order Contact Email Purchase Order Contact Email <input type="text" value="jay@vertosoft.com"/>
23	Purchase Order Contact Phone Enter 10 digit phone number. (No dashes or extensions) Example: 8668398477 <input type="text" value="703.568.4703"/>
24	Company Website Company Website (Format - www.company.com) <input type="text" value="www.vertosoft.com"/>
25	Federal ID Number: Federal ID Number also known as the Employer Identification Number. (Format - 12-3456789) <input type="text" value="81-3911287"/>
26	Primary Address Primary Address <input type="text" value="1602 Village Market Blvd. Suite 215"/>
27	Primary Address City Primary Address City <input type="text" value="Leesburg"/>

28

Primary Address State

Primary Address State (2 Digit Abbreviation)

29

Primary Address Zip

Primary Address Zip

30

Search Words:

Please list search words to be posted in the TIPS database about your company that TIPS website users might search. Words may be product names, manufacturers, or other words associated with the category of award. YOU MAY NOT LIST NON-CATEGORY ITEMS. (Limit 500 words) (Format: product, paper, construction, manufacturer name, etc.)

Workiva, Wdesk, Data Management, Collaboration, Comprehensive Agency Financial Reports, CAFR, Internal Controls, Risk Management EPAY, Time and Attendance, HR, Human Resources, Human Capital Management, Open Gov, Budget, Performance, Data Driven Decisions, Economic Development, Council Manager Relations, Cloudtamer, Cloud, Cloud Governance, Compliance, HIPPA, Cloud Spend Management, Budget Enforcement, Security Policy Enforcement, Streamsets, Data Lake, Kafka, Streaming Data, Figure Eight, AI, ML, Artificial Intelligence, Machine Learning, Data Labeling, Data Enrichment, Product Categorization, Training Data, ITSM, CMDB, ITIL, Service Management, Service Desk, Service Management, Asset Management

31

Do you want TIPS Members to be able to spend Federal grant funds with you if awarded? Is it your intent to be able to sell to our members regardless of the fund source, whether it be local, state or federal?

Most of our members receive Federal Government grants and they make up a significant portion of their budgets. The members need to know if your company is willing to sell to them when they spend federal budget funds on their purchase. There are attributes that follow that are provisions from the federal regulations in 2 CFR part 200. Your answers will determine if your award will be designated as Federal or Education Department General Administrative Regulations (EDGAR)compliant.

Do you want TIPS Members to be able to spend Federal grant funds with you if awarded and is it your intent to be able to sell to our members regardless of the fund source, whether it be local, state or federal?

32

Yes - No

Certification of Residency (Required by the State of Texas) The vendor's ultimate parent company or majority owner :

(A) has its principal place of business in Texas;

OR

(B) employs at least 500 persons in Texas?

3
3**Company Residence (City)**

Vendor's principal place of business is in the city of?

3
4**Company Residence (State)**

Vendor's principal place of business is in the state of?

3
5**Discount Offered - CAUTION READ CAREFULLY BECAUSE VENDORS FREQUENTLY MAKE MISTAKES ON THIS ATTRIBUTE QUESTION**

Remember this is a MINIMUM discount percentage so, be sure the discount percentage inserted here can be applied to ANY OFFERING OF GOODS OR SERVICES THROUGH OUT THE LIFE OF THE CONTRACT

CAUTION: BE CERTAIN YOU CAN HONOR THIS MINIMUM DISCOUNT PERCENTAGE ON ANY OFFERED SERVICE OR GOOD.

What is the MINIMUM percentage discount off of any item or service you offer to TIPS Members that is in your regular catalog (as defined in the RFP document), website, store or shelf pricing? The resulting price of any goods or services Catalog list prices after this discount is applied is a ceiling on your pricing and not a floor because, in order to be more competitive in the individual circumstance, you may offer a larger discount depending on the items or services purchased and the quantity at time of sale. Must answer with a number between 0% and 100%.

3
6**TIPS administration fee**

By submitting a proposal, I agree that all pricing submitted to TIPS shall include the participation fee, as designated in the solicitation or as otherwise agreed in writing and shall be remitted to TIPS by the Vendor as agreed in the Vendor agreement. I agree that the fee shall not and will not be added by the vendor as a separate line item on a TIPS member invoice, quote, proposal or any other written communications with the TIPS member.

3
7**Yes - No**

Vendor agrees to remit to TIPS the required administration fee?

TIPS/ESC Region 8 is required by Texas Government Code § 791 to be compensated for its work and thus, failure to agree shall render your response void and it will not be considered.

3
8**Yes - No**

Do you offer additional discounts to TIPS members for large order quantities or large scope of work?

3
9**Years Experience**

Company years experience in this category? This is an evaluation criterion worth a maximum of 10 points. See RFP for more information.

4
0

Resellers:

Does the vendor have resellers that it will name under this contract? Resellers are defined as other companies that sell your products under an agreement with you, the awarded vendor of TIPS.

EXAMPLE: BIGmart is a reseller of ACME brand televisions. If ACME were a TIPS awarded vendor, then ACME would list BIGmart as a reseller.

(If applicable, vendor should download the Reseller/Dealers spreadsheet from the Attachments section, fill out the form and submit the document in the "Response Attachments" RESELLERS section.

4
1

Pricing discount percentage are guaranteed for?

Does the vendor agrees to honor the proposed pricing discount percentage off regular catalog (as defined in the RFP document), website, store or shelf pricing for the term of the award?

4
2

Right of Refusal

Does the proposing vendor wish to reserve the right not to perform under the awarded agreement with a TIPS member at vendor's discretion?

4
3

NON-COLLUSIVE BIDDING CERTIFICATE

By submission of this bid or proposal, the Bidder certifies that:

- 1) This bid or proposal has been independently arrived at without collusion with any other Bidder or with any Competitor;
- 2) This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids, or proposals for this project, to any other Bidder, Competitor or potential competitor;
- 3) No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
- 4) The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the Bidder as well as to the person signing in its behalf.

Not a negotiable term. Failure to agree will render your proposal non-responsive and it will not be considered.

4
4**CONFLICT OF INTEREST QUESTIONNAIRE - FORM CIQ - Do you have any CONFLICT OF INTEREST TO REPORT OR DISCLOSE under this statutory requirement?**

Do you have any CONFLICT OF INTEREST TO REPORT OR DISCLOSE under this statutory requirement? YES or NO

If you have a conflict of interest as described in this form or the Local Government Code Chapter 176, cited therein- you are required to complete and file with TIPS.

You may find the Blank CIQ form on our website at:

Copy and Paste the following link into a new browser or tab:

<https://www.tips-usa.com/assets/documents/docs/CIQ.pdf>

There is an optional upload for this form provided if you have a conflict and must file the form.

4
5**Filing of Form CIQ**

If yes (above), have you filed a form CIQ by uploading the form to this RFP as directed above?

4
6**Regulatory Standing**

I certify to TIPS for the proposal attached that my company is in good standing with all governmental agencies Federal or state that regulate any part of our business operations. If not, please explain in the next attribute question.

4
7**Regulatory Standing**

Regulatory Standing explanation of no answer on previous question.

4
8**Antitrust Certification Statements (Tex. Government Code § 2155.005)**

By submission of this bid or proposal, the Bidder certifies that:

I affirm under penalty of perjury of the laws of the State of Texas that:

(1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;

(2) In connection with this bid, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;

(3) In connection with this bid, neither I nor any representative of the Company has violated any federal antitrust law ;

(4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

Suspension or Debarment Instructions

Instructions for Certification:

1. By answering yes to the next Attribute question below, the vendor and prospective lower tier participant is providing the certification set out herein in accordance with these instructions.
2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and / or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participants," "person," "primary covered transaction," "principal," "proposal" and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it shall not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this form that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion-Lower Tier Covered Transaction" without modification in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the Nonprocurement List.
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible or voluntarily excluded from participation in this transaction, in addition to other remedies available to the federal government, the department or agency with which this transaction originated may pursue available remedies, including suspension and / or debarment.

50

Suspension or Debarment Certification

By answering yes, you certify that no federal suspension or debarment is in place, which would preclude receiving a federally funded contract as described above.

Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive

Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

By answering yes, you certify that no federal suspension or debarment is in place, which would preclude receiving a federally funded contract as described above.

51

Non-Discrimination Statement and Certification

In accordance with Federal civil rights law, all U.S. Departments, including the U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

(Title VI of the Education Amendments of 1972; Section 504 of the Rehabilitation Act of 1973; the Age Discrimination Act of 1975; Title 7 CFR Parts 15, 15a, and 15b; the Americans with Disabilities Act; and FNS Instruction 113-1, Civil Rights Compliance and Enforcement – Nutrition Programs and Activities)

All U.S. Departments, including the USDA are equal opportunity provider, employer, and lender.

Not a negotiable term. Failure to agree by answering YES will render your proposal non-responsive and it will not be considered. I certify that in the performance of a contract with TIPS or its members, that our company will conform to the foregoing anti-discrimination statement and comply with the cited and all other applicable laws and regulations.

5 2 2 CFR PART 200 Contract Provisions Explanation

Required Federal contract provisions of Federal Regulations for Contracts for contracts with ESC Region 8 and TIPS Members:

The following provisions are required to be in place and agreed if the procurement is funded in any part with federal funds.

The ESC Region 8 and TIPS Members are the subgrantee or Subrecipient by definition. Most of the provisions are located in 2 CFR PART 200 - Appendix II to Part 200—Contract Provisions for Non-Federal Entity Contracts Under Federal Awards at 2 CFR PART 200. Others are included within 2 CFR part 200 et al.

In addition to other provisions required by the Federal agency or non-Federal entity, all contracts made by the non-Federal entity under the Federal award must contain provisions covering the following, as applicable.

5 3 2 CFR PART 200 Contracts

Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Notice: Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

Does vendor agree?

5 4 2 CFR PART 200 Termination

Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of \$10,000)

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process for cause after giving the vendor an appropriate opportunity and up to 30 days, to cure the causal breach of terms and conditions. ESC Region 8 and TIPS Members reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process for convenience with 30 days notice in writing to the awarded vendor. The vendor would be compensated for work performed and goods procured as of the termination date if for convenience of the ESC Region 8 and TIPS Members. Any award under this procurement process is not exclusive and the ESC Region 8 and TIPS reserves the right to purchase goods and services from other vendors when it is in the best interest of the ESC Region 8 and TIPS.

Does vendor agree?

5
5**2 CFR PART 200 Clean Air Act**

Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

Pursuant to the Clean Air Act, et al above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members requires that the proposer certify that during the term of an award by the ESC Region 8 and TIPS Members resulting from this procurement process the vendor agrees to comply with all of the above regulations, including all of the terms listed and referenced therein.

Does vendor agree?

5
6**2 CFR PART 200 Byrd Anti-Lobbying Amendment**

Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members requires the proposer certify that during the term and during the life of any contract with ESC Region 8 and TIPS Members resulting from this procurement process the vendor certifies to the terms included or referenced herein.

Does vendor agree?

5
7**2 CFR PART 200 Federal Rule**

Compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15). (Contracts, subcontracts, and subgrants of amounts in excess of \$100,000)

Pursuant to the above, when federal funds are expended by ESC Region 8 and TIPS Members, ESC Region 8 and TIPS Members requires the proposer certify that in performance of the contracts, subcontracts, and subgrants of amounts in excess of \$100,000, the vendor will be in compliance with all applicable standards, orders, or requirements issued under section 306 of the Clean Air Act (42 U.S.C. 1857(h)), section 508 of the Clean Water Act (33 U.S.C. 1368), Executive Order 11738, and Environmental Protection Agency regulations (40 CFR part 15).

Does vendor certify that it is in compliance with the Clean Air Act?

5 2 CFR PART 200 Procurement of Recovered Materials

A non-Federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Does vendor certify that it is in compliance with the Solid Waste Disposal Act as described above?

Yes

5 9 Certification Regarding Lobbying

Applicable to Grants, Subgrants, Cooperative Agreements, and Contracts Exceeding \$100,000 in Federal Funds

Submission of this certification is a prerequisite for making or entering into this transaction and is imposed by section 1352, Title 31, U.S. Code. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The undersigned certifies, to the best of his or her knowledge and belief, that:

(1) No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "disclosure Form to Report Lobbying," in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all covered subawards exceeding \$100,000 in Federal funds at all appropriate tiers and that all subrecipients shall certify and disclose accordingly.

I HAVE NOT Lobbied per above

6 0 If you answered "I HAVE lobbied per above to the previous question.

IF you answered "I HAVE lobbied" per above Attribute question, you must download the Lobbying Report "Standard Form LLL, disclosure Form to Report Lobbying" which includes instruction on completing the form, complete and submit it in the Response Attachments section as a report of the lobbying activities you performed or paid others to perform.

6
1

Subcontracting with small and minority businesses, women's business enterprises, and labor surplus area firms.

Do you ever anticipate the possibility of subcontracting any of your work under this award if you are successful?

IF NO, DO NOT ANSWER THE NEXT ATTRIBUTE QUESTION. . IF YES, and ONLY IF YES, you must answer the next question YES if you want a TIPS Member to be authorized to spend Federal Grant Funds for Procurement.

NO

6
2

ONLY IF YES TO THE PREVIOUS QUESTION OR if you ever do subcontract any part of your performance under the TIPS Agreement, do you agree to comply with the following federal requirements?

ONLY IF YES TO THE PREVIOUS QUESTION OR if you ever do subcontract any part of your performance under the TIPS Agreement,

do you agree to comply with the following federal requirements?

Federal Regulation 2 CFR §200.321 Contracting with small and minority businesses, women's business enterprises, and labor surplus area firms. (a)The non-Federal entity must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible.

(b) Affirmative steps must include:(1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce ; and

(6) Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs(1) through (5) of this section.

No response

6
3

Indemnification

The ESC Region 8 and TIPS is a Texas Political Subdivision and a local governmental entity; therefore, is prohibited from indemnifying third parties pursuant to the Texas Constitution (Article 3, Section 52) except as specifically provided by law or as ordered by a court of competent jurisdiction. A provision in a contract to indemnify or hold a party harmless is a promise to pay for any expenses the indemnified party incurs, if a specified event occurs, such as breaching the terms of the contract or negligently performing duties under the contract. Article III, Section 49 of the Texas Constitution states that "no debt shall be created by or on behalf of the State ... " The Attorney General has counseled that a contractually imposed obligation of indemnity creates a "debt" in the constitutional sense. Tex. Att'y Gen. Op. No. MW-475 (1982). Contract clauses which require the System or institutions to indemnify must be deleted or qualified with "to the extent permitted by the Constitution and Laws of the State of Texas." Liquidated damages, attorney's fees, waiver of vendor's liability, and waiver of statutes of limitations clauses should also be deleted or qualified with "to the extent permitted by the Constitution and laws of State of Texas."

Not a negotiable term. Failure to agree will render your proposal non-responsive and it will not be considered. Do you agree to these terms?

6
4

Remedies

The parties shall be entitled to exercise any right or remedy available to it either at law or in equity, subject to the choice of law, venue and service of process clauses limitations agreed herein. Nothing in this agreement shall commit the TIPS to an arbitration resolution of any disagreement under any circumstances. Any Claim arising out of or related to the Contract, except for those specifically waived under the terms of the Contract, may, after denial of the Board of Directors, be subject to mediation at the request of either party. Any issues not resolved hereunder MAY be referred to non-binding mediation to be conducted by a mutually agreed upon mediator as a prerequisite to the filing of any lawsuit over such issue(s). The parties shall share the mediator's fee and any associated filing fee equally. Mediation shall be held in Camp or Titus County, Texas. Agreements reached in mediation shall be reduced to writing, and will be subject to the approval by the District's Board of Directors, signed by the Parties if approved by the Board of Directors, and, if signed, shall thereafter be enforceable as provided by the laws of the State of Texas.

Do you agree to these terms?

6
5

Remedies Explanation of No Answer

6
6**Choice of Law**

The agreement between the Vendor and TIPS/ESC Region 8 and any addenda or other additions resulting from this procurement process, however described, shall be governed by, construed and enforced in accordance with the laws of the State of Texas, regardless of any conflict of laws principles.
THIS DOES NOT APPLY to a vendor's agreement entered into with a TIPS Member, as the Member may be located outside Texas.

Not a negotiable term. Failure to agree will render your proposal non-responsive and it will not be considered. Do you agree to these terms?

6
7**Jurisdiction and Service of Process**

Any Proceeding arising out of or relating to this procurement process or any contract issued by TIPS resulting from or any contemplated transaction shall be brought in a court of competent jurisdiction in Camp County, Texas and each of the parties irrevocably submits to the exclusive jurisdiction of said court in any such proceeding, waives any objection it may now or hereafter have to venue or to convenience of forum, agrees that all claims in respect of the Proceeding shall be heard and determined only in any such court, and agrees not to bring any proceeding arising out of or relating to this procurement process or any contract resulting from or any contemplated transaction in any other court. The parties agree that either or both of them may file a copy of this paragraph with any court as written evidence of the knowing, voluntary and freely bargained for agreement between the parties irrevocably waive any objections to venue or to convenience of forum. Process in any Proceeding referred to in the first sentence of this Section may be served on any party anywhere in the world. Venue clauses in contracts with TIPS members may be determined by the parties.

Not a negotiable term. Failure to agree will render your proposal non-responsive and it will not be considered. Do you agree to these terms?

6
8**Infringement(s)**

The successful vendor will be expected to indemnify and hold harmless the TIPS and its employees, officers, agents, representatives, contractors, assignees and designees from any and all third party claims and judgments involving infringement of patent, copyright, trade secrets, trade or service marks, and any other intellectual or intangible property rights attributed to or claims based on the Vendor's proposal or Vendor's performance of contracts awarded and approved.

Do you agree to these terms?

6
9**Infringement(s) Explanation of No Answer**7
0**Contract Governance**

Any contract made or entered into by the TIPS is subject to and is to be governed by Section 271.151 et seq, Tex Loc Gov't Code. Otherwise, TIPS does not waive its governmental immunities from suit or liability except to the extent expressly waived by other applicable laws in clear and unambiguous language.

7
1

Payment Terms and Funding Out Clause

Payment Terms:

TIPS or TIPS members shall not be liable for interest or late payment fees on past due balances at a rate higher than permitted by the laws or regulations of the jurisdiction of the TIPS Member.

Funding Out Clause:

Vendor agrees to abide by the laws and regulations, including Texas Local Government Code § 271.903, or any statutory or regulatory limitations of the jurisdiction of any TIPS Member which governs contracts entered into by the Vendor and TIPS or a TIPS Member that requires all contracts approved by TIPS or a TIPS Member are subject to the budgeting and appropriation of currently available funds by the entity or its governing body.

See statute(s) for specifics or consult your legal counsel.

Not a negotiable term. Failure to agree will render your proposal non-responsive and it will not be considered.

Do you agree to these terms?

7
2

Insurance and Fingerprint Requirements Information

Insurance

If applicable and your staff will be on TIPS member premises for delivery, training or installation etc. and/or with an automobile, you must carry automobile insurance as required by law. You may be asked to provide proof of insurance.

Fingerprint

It is possible that a vendor may be subject to Chapter 22 of the Texas Education Code. The Texas Education Code, Chapter 22, Section 22.0834. Statutory language may be found at: <http://www.statutes.legis.state.tx.us/>

If the vendor has staff that meet both of these criterion:

- (1) will have continuing duties related to the contracted services; and
- (2) has or will have direct contact with students

Then you have "covered" employees for purposes of completing the attached form.

TIPS recommends all vendors consult their legal counsel for guidance in compliance with this law. If you have questions on how to comply, see below. If you have questions on compliance with this code section, contact the Texas Department of Public Safety Non-Criminal Justice Unit, Access and Dissemination Bureau, FAST-FACT at NCJU@txdps.state.tx.us and you should send an email identifying you as a contractor to a Texas Independent School District or ESC Region 8 and TIPS. Texas DPS phone number is (512) 424-2474.

See form in the next attribute to complete entitled:
Texas Education Code Chapter 22 Contractor Certification for Contractor Employees

Texas Education Code Chapter 22 Contractor Certification for Contractor Employees

Introduction: Texas Education Code Chapter 22 requires entities that contract with school districts to provide services to obtain criminal history record information regarding covered employees. Contractors must certify to the district that they have complied. Covered employees with disqualifying criminal histories are prohibited from serving at a school district.

Definitions: Covered employees: Employees of a contractor or subcontractor who have or will have continuing duties related to the service to be performed at the District and have or will have direct contact with students. The District will be the final arbiter of what constitutes direct contact with students. Disqualifying criminal history: Any conviction or other criminal history information designated by the District, or one of the following offenses, if at the time of the offense, the victim was under 18 or enrolled in a public school:

(a) a felony offense under Title 5, Texas Penal Code; (b) an offense for which a defendant is required to register as a sex offender under Chapter 62, Texas Code of Criminal Procedure; or (c) an equivalent offense under federal law or the laws of another state.

I certify that:

NONE (Section A) of the employees of Contractor and any subcontractors are covered employees, as defined above. If this box is checked, I further certify that Contractor has taken precautions or imposed conditions to ensure that the employees of Contractor and any subcontractor will not become covered employees. Contractor will maintain these precautions or conditions throughout the time the contracted services are provided.

OR

SOME (Section B) or all of the employees of Contractor and any subcontractor are covered employees. If this box is checked, I further certify that:

(1) Contractor has obtained all required criminal history record information regarding its covered employees. None of the covered employees has a disqualifying criminal history.

(2) If Contractor receives information that a covered employee subsequently has a reported criminal history, Contractor will immediately remove the covered employee from contract duties and notify the District in writing within 3 business days.

(3) Upon request, Contractor will provide the District with the name and any other requested information of covered employees so that the District may obtain criminal history record information on the covered employees.

(4) If the District objects to the assignment of a covered employee on the basis of the covered employee's criminal history record information, Contractor agrees to discontinue using that covered employee to provide services at the District.

Noncompliance or misrepresentation regarding this certification may be grounds for contract termination.

☐ None

7
4

Texas Business and Commerce Code § 272 Requirements as of 9-1-2017

SB 807 prohibits construction contracts to have provisions requiring the contract to be subject to the laws of another state, to be required to litigate the contract in another state, or to require arbitration in another state. A contract with such provisions is voidable. Under this new statute, a "construction contract" includes contracts, subcontracts, or agreements with (among others) architects, engineers, contractors, construction managers, equipment lessors, or materials suppliers. "Construction contracts" are for the design, construction, alteration, renovation, remodeling, or repair of any building or improvement to real property, or for furnishing materials or equipment for the project. The term also includes moving, demolition, or excavation. BY RESPONDING TO THIS SOLICITATION, AND WHEN APPLICABLE, THE PROPOSER AGREES TO COMPLY WITH THE TEXAS BUSINESS AND COMMERCE CODE § 272 WHEN EXECUTING CONTRACTS WITH TIPS MEMBERS THAT ARE TEXAS GOVERNMENT ENTITIES.

7
5

Texas Government Code 2270 Verification Form

Texas Government Code 2270 Verification Form

Texas 2017 House Bill 89 has been signed into law by the governor and as of September 1, 2017 will be codified as Texas Government Code § 2270 and 808 et seq.

The relevant section addressed by this form reads as follows:

Texas Government Code Sec. 2270.002. PROVISION REQUIRED IN CONTRACT. A governmental entity may not enter into a contract with a company for goods or services unless the contract contains a written verification from the company that it: (1) does not boycott Israel; and (2) will not boycott Israel during the term of the contract. engaged by ESC Region 8/The Interlocal Purchasing System (TIPS)

4845 Highway 271 North

Pittsburg, TX, 75686

verify by this writing that the above-named company affirms that it (1) does not boycott Israel; and (2) will not boycott Israel during the term of this contract, or any contract with the above-named Texas governmental entity in the future. I further affirm that if our company's position on this issue is reversed and this affirmation is no longer valid, that the above-named Texas governmental entity will be notified in writing within one (1) business day and we understand that our company's failure to affirm and comply with the requirements of Texas Government Code 2270 et seq. shall be grounds for immediate contract termination without penalty to the above-named Texas governmental entity.

AND

our company is not listed on and we do not do business with companies that are on the the Texas Comptroller of Public Accounts list of Designated Foreign Terrorists Organizations per Texas Gov't Code 2270.0153 found at <https://comptroller.texas.gov/purchasing/docs/foreign-terrorist.pdf>

I swear and affirm that the above is true and correct.

YES ☐

7
6**Logos and other company marks**

Please upload your company logo to be added to your individual profile page on the TIPS website. If any particular specifications are required for use of your company logo, please upload that information under the "Logo and Other Company Marks" section under the "Response Attachment" tab. Preferred Logo Format: 300 x 225 px - .png, .eps, .jpeg preferred

Potential uses of company logo:

* Your Vendor Profile Page of TIPS website

* Potentially on TIPS website scroll bar for Top Performing Vendors

* TIPS Quarterly eNewsletter sent to TIPS Members

* Co-branding Flyers and or email blasts to our TIPS Members (Permission and approval will be obtained before publishing)

7
7**Solicitation Deviation/Compliance**

Does the vendor agree with the General Conditions Standard Terms and Conditions or Item Specifications listed in this proposal invitation?

7
8**Solicitation Exceptions/Deviations Explanation**

If the bidder intends to deviate from the General Conditions Standard Terms and Conditions or Item Specifications listed in this proposal invitation, all such deviations must be listed on this attribute, with complete and detailed conditions and information included or attached.

TIPS will consider any deviations in its proposal award decisions, and TIPS reserves the right to accept or reject any bid based upon any deviations indicated below or in any attachments or inclusions.

In the absence of any deviation entry on this attribute, the proposer assures TIPS of their full compliance with the Standard Terms and Conditions, Item Specifications, and all other information contained in this Solicitation.

7
9**Agreement Deviation/Compliance**

Does the vendor agree with the language in the Vendor Agreement?

8
0**Agreement Exceptions/Deviations Explanation**

If the proposing Vendor desires to deviate from the Vendor Agreement language, all such deviations must be listed on this attribute, with complete and detailed conditions and information included. TIPS will consider any deviations in its proposal award decisions, and TIPS reserves the right to accept or reject any proposal based upon any deviations indicated below. In the absence of any deviation entry on this attribute, the proposer assures TIPS of their full compliance with the Vendor Agreement.

8
1**Felony Conviction Notice**

Texas Education Code, Section 44.034, Notification of Criminal History, Subsection (a), states “a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.” Subsection (b) states “a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract.” (c) This section does not apply to a publicly held corporation. The person completing this proposal certifies that they are authorized to provide the answer to this question.

Select A., B. or C.

A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.

OR B. My firm is not owned nor operated by anyone who has been convicted of a felony, OR

C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony. (if you answer C below, you are required to provide information in the next attribute.

B. Firm not owned nor operated by felon; per above

8
2**If you answered C. My Firm is owned or operated by a felon to the previous question, you are REQUIRED TO ANSWER THE FOLLOWING QUESTIONS.**

If you answered C. My Firm is owned or operated by a felon to the previous question, you must provide the following information.

1. Name of Felon(s)

2. The named person's role in the firm, and

3. Details of Conviction(s).

No response

8
3**Long Term Cost Evaluation Criterion # 4.**

READ CAREFULLY and see in the RFP document under "Proposal Scoring and Evaluation".

Points will be assigned to this criterion based on your answer to this Attribute. Points are awarded if you agree not to increase your catalog prices (as defined herein) more than X% annually over the previous year for years two and three and potentially year four, unless an exigent circumstance exists in the marketplace and the excess price increase which exceeds X% annually is supported by documentation provided by you and your suppliers and shared with TIPS, if requested. If you agree NOT to increase prices more than 5%, except when justified by supporting documentation, you are awarded 10 points; if 6% to 14%, except when justified by supporting documentation, you receive 1 to 9 points incrementally. Price increases 14% or greater, except when justified by supporting documentation, receive 0 points.

increases will be 5% or less annually per question

8
4**Required Confidentiality Claim Form**

Required Confidentiality Claim Form

This completed form is required by TIPS. By submitting a response to this solicitation you agree to download from the “Attachments” section, complete according to the instructions on the form, then uploading the completed form, with any confidential attachments, if applicable, to the “Response Attachments” section titled “Confidentiality Form” in order to provide to TIPS the completed form titled, “CONFIDENTIALITY CLAIM FORM”. By completing this process, you provide us with the information we require to comply with the open record laws of the State of Texas as they may apply to your proposal submission. If you do not provide the form with your proposal, an award will not be made if your proposal is qualified for an award, until TIPS has an accurate, completed form from you.

Read the form carefully before completing and if you have any questions, email Rick Powell at TIPS at rick.powell@tjps-usa.com

8
5**Choice of Law clauses with TIPS Members**

If the vendor is awarded a contract with TIPS under this solicitation, the vendor agrees to make any Choice of Law clauses in any contract or agreement entered into between the awarded vendor and with a TIPS member entity to read as follows: "Choice of law shall be the laws of the state where the customer resides" or words to that effect.

8
6**Venue of dispute resolution with a TIPS Member**

In the event of litigation or use of any dispute resolution model when resolving disputes with a TIPS member entity as a result of a transaction between the vendor and TIPS or the TIPS member entity, the Venue for any litigation or other agreed upon model shall be in the state and county where the customer resides unless otherwise agreed by the parties at the time the dispute resolution model is decided by the parties.

8
7**Automatic renewal of contracts or agreements with TIPS or a TIPS member entity**

This clause **DOES NOT** prohibit multiyear contracts or agreements with TIPS member entities. Because TIPS and TIPS members are governmental entities subject to laws that control appropriations of funds during their fiscal years for contracts and agreements to provide goods and services, does the Vendor agree to limit any automatic renewal clauses of a contract or agreement executed as a result of this TIPS solicitation award to not longer than "month to month" and at the TIPS contracted rate.

8
8**Indemnity Limitation with TIPS Members**

Texas and other states restrict by law or state Constitution the ability of a governmental entity to indemnify others. TIPS requires that any contract entered into between a vendor and TIPS or a TIPS Member as a result of an award under this Solicitation limit the requirement that the Customer indemnify the Vendor by either eliminating any such indemnity requirement clauses in any agreements, contracts or other binding documents **OR** by prefacing all indemnity clauses required of TIPS or the TIPS Member entity with the following: "To the extent permitted by the laws or the Constitution of the state where the customer resides, ".

Agreement is a required condition to award of a contract resulting from this Solicitation.

8
9**Arbitration Clauses**

Except for certain circumstances, TIPS forbids a mandatory arbitration clause in any contract or agreement entered into between the awarded vendor with TIPS or a TIPS member entity. Does the vendor agree to exclude any arbitration requirement in any contracts or agreement entered into between TIPS or a TIPS member entity through an awarded contract with TIPS?

9
0**Required Vendor Sales Reporting**

By responding to this Solicitation, you agree to report to TIPS all sales made under any awarded Agreement with TIPS. Vendor is required to report all sales under the TIPS contract to TIPS. If the TIPS Member entity requesting a price from the awarded Vendor requests the TIPS contract, Vendor must include the TIPS Contract number on any communications with the TIPS Member entity. If awarded, you will be provided access to the Vendor Portal. To report sales, login to the TIPS Vendor Portal and click on the PO's and Payments tab. Pages 3-7 of the [Vendor Portal User Guide](#) will walk you through the process of reporting sales to TIPS. Please refer to the TIPS [Accounting FAQ's](#) for more information about reporting sales and if you have further questions, contact the Accounting Team at accounting@tips-usa.com. The Vendor or vendor assigned dealers are responsible for keeping record of all sales that go through the TIPS Agreement and submitting same to TIPS.

REFERENCES

Please provide three (3) references, preferably from school districts or other governmental entities who have used your services within the last three years. Additional references may be required. DO NOT INCLUDE TIPS EMPLOYEES AS A REFERENCE.

You may provide more than three (3) references.

Entity Name	Contact Person	VALID EMAIL IS REQUIRED	Phone
Texas Tech	Teri Floyd	teri.floyd@ttu.edu	806-834-0283
Texas Workforce Commission	Leo Paterra	leo.paterra@twc.state.tx.us	512-475-3010
Texas Comptroller	Terri Thomas	terri.thomas@cpa.texas.gov	512-475-0007
Indiana Public Retirement System	Amelia Thees	athees@inprs.in.gov	317-234-2370
City of Oakland	Kirsten LaCasse	klacasse@oaklandnet.com	510-238-6776
California State University	Mary Carrillo	mcarrillo@calstate.edu	562-951-4639

Required Confidential Information Status Form

CONFIDENTIAL INFORMATION SUBMITTED IN RESPONSE TO COMPETITIVE PROCUREMENT REQUESTS OF EDUCATION SERVICE CENTER REGION 8 AND TIPS (ESC8) IS GOVERNED BY TEXAS GOVERNMENT CODE, CHAPTER 552

If you consider any portion of your proposal to be confidential information and not subject to public disclosure pursuant to Chapter 552 Texas Gov't Code or other law(s), you **must attach a copy of all claimed confidential materials within your proposal and put this COMPLETED form as a cover sheet to said materials then scan, name "CONFIDENTIAL" and upload with your proposal submission.** (You must include all the confidential information in the submitted proposal. The copy uploaded is to indicate which material in your proposal, if any, you deem confidential in the event the receives a Public Information Request.) ESC8 and TIPS will follow procedures of controlling statute(s) regarding any claim of confidentiality and shall not be liable for any release of information required by law. Upon your claim and your defense to the Office of Texas Attorney General is required to make the final determination whether the information submitted by you and held by ESC8 and TIPS is confidential and exempt from public disclosure.

Vertosoft LLC

Name of company

Chet Hayes / Chief Technology Officer

Printed Name and Title of authorized company officer declaring below the confidential status of material

1602 Village Market Blvd.#215 Leesburg VA 20175 571.707.4137

Address

City

State

ZIP

Phone

ALL VENDORS MUST COMPLETE THE ABOVE SECTION.

I DO CLAIM parts of my proposal to be confidential and DO NOT desire to expressly waive a claim of confidentiality of all information contained within our response to the solicitation. The attached contains material from our proposal that I classify and deem confidential under Texas Gov't Code Sec. 552 or other law(s) and I invoke my statutory rights to confidential treatment of the enclosed materials.

ATTACHED ARE COPIES OF _____ PAGES OF CLAIMED CONFIDENTIAL MATERIAL FROM OUR PROPOSAL THAT WE DEEM TO BE NOT PUBLIC INFORMATION AND WILL DEFEND THAT CLAIM TO THE TEXAS ATTORNEY GENERAL IF REQUESTED WHEN A PUBLIC INFORMATION REQUEST IS MADE FOR OUR PROPOSAL.

Signature _____ Date **02/07/2020****OR** -----

I DO NOT CLAIM any of my proposal to be confidential, complete the section below.

Express Waiver: I desire to expressly waive any claim of confidentiality as to any and all information contained within our response to the competitive procurement process (e.g. RFP, CSP, Bid, RFQ, etc.) by completing the following and submitting this sheet with our response to Education Service Center Region 8 and TIPS.

Signature **Chet Hayes**Digitally signed by Chet Hayes
Date: 2020.02.07 15:45:46 -05'00' Date **02/07/2020**



Region 8 Education Service Center

RFP
for
Technology Solutions Products and Services

RFP 200105

Presented by:



Vertosoft LLC
1602 Village Market Blvd. #215
Leesburg, VA 20175

DUNS# 080431574 & Cage Code: 7QV38
GSA Contract # GS-35F-688GA
Certified Small Business Concern
Federal Tax ID: 81-3911287
NAICs Codes: 541512, 541611, 518210, 511210, 541519
Chet Hayes
Chief Technology Officer
202.596.9171
chet@vertosoft.com

www.vertosoft.com

02/21/2020

Executive Summary

Vertosoft LLC (Vertosoft) is focused on delivering innovative and emerging technologies and services to members of The Interlocal Purchasing System (TIPS). Consistent with our dedication to government customers, Vertosoft has deep knowledge and experience supporting all phases of the government acquisition life cycle. We specialize in providing services to emerging technology companies and the government agencies they serve. Strategic sourcing is our forte, streamlining the time required to provide critical technology and services to government end users at reduced prices. We provide TIPS members the flexibility, agility, and responsiveness of a small company with the experience of a large organization. Vertosoft's staff is widely respected and relied upon for its professional, ethical business approach. Our success is based upon the leadership of a highly-experienced management team, and our staff has deep expertise in meeting each agency's specific requirements and, in the technology required to satisfy those requirements.

Vertosoft has partnered with several leading technology companies to offer innovative and advanced solutions across multiple service and deployment models to be used by schools, colleges, universities, cities, counties and other government entities in all fifty states.



cloudtamer.io is comprehensive cloud governance software (SaaS) that allows organizations to manage their cloud presence at scale. With cloudtamer.io, teams can easily request and manage cloud resources that are aligned with organization budget, security, and compliance policies. cloudtamer.io was created to provide access to thousands of developers and researchers controlled access to a multi-petabyte data repository for a large US Government agency. Since the initial deployment, cloudtamer.io has been acquired by NASA and other agencies within the federal government.



Founded in 2001, EPAY Systems is a Chicago-based business that has been developing SaaS based solutions for the past 17 years that help organizations manage an hourly workforce. Deployed to over 75,000 worksites around the country, EPAY is a leader in the Human Capital Management (HCM) space with customers such as The United States Department of the Army, Kelly Services, Compass Group, Berg Electric, ISS Facility Services, and Healthcare Services Group. EPAY Solutions largest customer has over 125,000 employees, and an average client size of 1,400 employees.



Figure Eight is the essential human-in-the-loop AI platform for data science teams. Figure Eight helps agencies generate high-quality customized training data for their machine learning initiatives or automate a business process with easy-to-deploy models and integrated human-in-the-loop workflows. The Figure Eight software platform supports a wide range of use cases including self-driving cars, intelligent personal assistants, medical image labeling, content categorization, customer support ticket classification, social data insight, CRM data enrichment, product categorization, and search relevance.



HCL SOFTWARE HCL Software develops, markets, sells, and supports over 20 product families in the areas of DevSecOps, Automation, Digital Solutions, Data Management, Marketing and Commerce, and Mainframes. HCL acquired AppScan, BigFix, Domino, Notes, Sametime, Connections, Unica, Urban

Code, and the Z line of products from IBM. Many of these products are used today by TIPS members, and Vertosoft is one of the few companies authorized to sell HCL products to public sector entities.



OpenGov's mission is to power a more effective government by building an easy-to-use, modern cloud solution built specifically for the public sector. OpenGov's budgeting and planning solution allows you to easily collaborate across your organization to create your budget book, gather citizen feedback, and quickly perform workforce planning.

OpenGov's Operational Performance solution provides dynamic dashboards with detailed drilldowns allowing organizations to share complex financial information with ease. The Citizen engagement solution provides 2-way conversations with constituents through online surveys and automated townhalls. All three solutions are built on an open data Smart Platform that aggregates all of your disparate data sources across your organization to provide a single source of truth. This comprehensive cloud solution enables agencies to easily track progress, make more informed decisions, and drive better outcomes



StreamSets provides the industry's only DataOps platform that enables agencies to build, execute, operate and protect the dataflows that drive pervasive analytics. It combines award-winning open source software featuring Dataflow Sensors that uniquely handle data drift with a cloud-native control plane that helps enterprises manage their data movement as a continuous ingestion practice.



Workiva provides Wdesk, an intuitive SaaS platform that modernizes how customers work with business data at thousands of organizations. Wdesk is built on a data management engine, offering controlled collaboration, data connections, granular permissions and a full audit trail. Wdesk helps mitigate risk, improves productivity and gives users confidence in their data-driven decisions. As of January 1st, 2019, more than 3,000 enterprises and public sector organizations including more than 70% of Fortune 500® companies, subscribed to the Workiva platform.

Don't let your cloud resources run wild.

Define, enforce, and automate with cloudtamer.io.

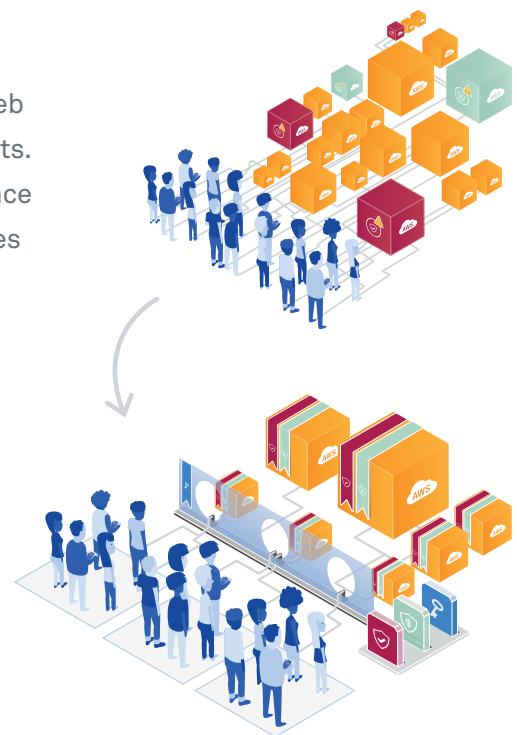
cloudtamer.io is comprehensive cloud governance software that allows you to manage your cloud presence at scale. With cloudtamer.io, your team can easily request and manage cloud resources that are aligned with your budget, security, and compliance policies.

Cloud Adoption Requires Governance

When you migrate to a public cloud service provider like Amazon Web Services (AWS), you realize some scalability and cost-saving benefits. But as your cloud adoption grows, without an enforceable governance model, you're left with a virtual 'rat's nest' of accounts and resources that are nearly impossible to manage.

Achieving Governance with cloudtamer.io

With cloudtamer.io, it's easy for your technical staff to get access to the resources they need. Your staff get native access to the console and APIs; cloudtamer.io is not a cloudbroker. And cloudtamer.io gives leaders confidence that users can't exceed established budgets or violate regulatory standards. cloudtamer.io not only reports, it enforces.



cloudtamer.io Features

Account Governance

- **Centralized management** of all cloud accounts and resources aligned to the organizational hierarchy
- **Federated single sign-on and MFA** for secure access to the cloud console
- **Automated, self-service** account creation with native console, CLI, and API access

Budget Enforcement

- **Hierarchical budget alignment** to projects and organizational units
- **Configurable enforcement actions** to alert, freeze spending, and terminate cloud resources when project spending thresholds are exceeded
- **Spending policies** to proactively enforce responsible use of cloud services

Compliance Automation

- **Robust inheritable access policies** to restrict use of non-compliant cloud services
- **Hierarchical inheritance** of compliance policies across organizations
- **Integration with third-party compliance** reporting tools to verify security controls

Common Issues:



For CFOs

"We overran our cloud budget by \$500K last year."



For Managers

"It takes forever to get the resources I need to help a customer."



For Developers

"I can't keep track of which services I should use due to compliance regulations."

Use cloudtamer.io to:

- Get visibility and centralized management of all cloud resources.
 - Monitor and enforce cloud service spending.
-
- Easily create accounts, approve requests, and grant access.
 - Reduce time spent maintaining and enforcing regulations.
-
- Automate staff adherence to defined compliance standards.
 - Use hierarchical account governance to help staff identify who to ask for more funding.

cloudtamer.io Success

Client

A leading US Government agency

Goal

Give thousands of developers and researchers controlled access to a multi-petabyte data repository.

Challenges

- Improve and streamline the user experience to access new AWS services.
- Reduce the time it takes to get access to a new cloud account to perform research.
- Restrict users and projects from incurring cloud expenses that exceed appropriated budgets to conform with the Antideficiency Act (ADA).
- Ensure projects implement relevant security controls to comply with FedRAMP & NIST SP 800-53.



Stratus Solutions is a technology partner that enables purpose-led organizations to achieve more.

Contact Us



info@cloudtamer.io



www.cloudtamer.io



Flexible Time and Attendance Tracking

EPAY's flexible time and labor management system adapts to the most complex labor environments, keeping you in control of your workforce and in compliance with labor laws, while reducing your labor costs by up to 5% or more.

Accommodate Every Pay Rule Variation

Unlike rigid time and labor management software, our system flexes to fit your unique requirements. Complicated overtime rules...shift differentials...multiple pay groups...union contracts...no environment is too complex for EPAY, so you won't need to pay extra to tailor the system to you.



Real-Time Visibility

Maintain control of every site and shift with instant access to labor data. Monitor attendance and schedules, track labor budgets, keep an eye on overtime, and stay on top of potential client issues.



Streamlined Payroll

Automated time sheets flow seamlessly into our human capital management system, helping you reduce payroll prep time, prevent miscalculations, and curb time-rounding overpayments.



Reduced Compliance Risk

Compliance safeguards like violation flagging rules and meal break alerts help you reduce exposure to labor lawsuits while building a complete audit trail.

Get Accurate, Down-to-the-Minute Time Tracking for All

Our time and labor management system helps you reduce labor costs by eliminating time rounding, buddy punching, and manual calculation errors. Mix-and-match time collection methods help you track 100% of your workforce—even the ones on the go—for instant visibility into your labor spend.

Biometric Time Clocks

Prevent time theft with our plug-and-play biometric time clocks, built to withstand harsh, industrial environments. Features include:

- Fingerprint recognition technology
- Built-in thermal printer
- Employee self-service (Access time sheets, schedules, and pay history; request time off; and check PTO balances)
- Multiple languages (English, Spanish, Polish, and Canadian French)
- WiFi, LAN, cellular, or dial-up connectivity
- Swipe card reader

Mobile Time Tracking with GPS

Ensure remote employees are clocking in and out where they should be with our mobile time tracking app for iOS® and Android® devices. Features include:

- Geo-fencing and geo-tracking
- Customizable fields for tracking tips, mileage, rooms cleaned, etc.
- Employee self-service (Access schedules, request time off, and check PTO balances)
- Group punch option for managers
- Digital signature sign-off

Telephone Time Tracking

Track employee time from any landline or cell phone with our integrated voice response (IVR) technology—an ideal solution when time clocks aren't an option. Employees simply call in to a toll-free number and follow the prompts. The system is completely customizable, so you can set up automatic lunch deductions and more.

Online Time Tracking

Capture employee time, tasks, and project information from any computer with an Internet connection. Our online time tracking option is perfect for office settings and professional facilities. In just a few clicks, employees can clock in and out for shifts, allocate time and assign dollar amounts to tasks, review schedules, and request time off.

Time and Labor Management Made Easy

EPAY's cloud-based time and labor management system works seamlessly with our completely unified human capital management system, giving you everything you need to effectively manage your workforce.

Time and Labor Management Features

- Flexible pay rules
- Labor budgeting and job costing capabilities
- Employee scheduling
- Real time alerts for managers
- Reporting and labor analytics
- Customizable employee performance tracking
- Compliance safeguards
- Built-in ACA reporting tools

Finally, time and labor management that flexes to fit your business and works seamlessly within your human capital management system!



That's the EPAY difference. Request a demo today!

WebPunch Online Time Tracking



CAPTURE TIME, TASKS AND PROJECTS RIGHT FROM THE DESKTOP

Not every business location requires a physical time clock!

Employees with access to a computer can take advantage of our online time tracking option, WebPunch™, and clock in and out from any computer with internet access. WebPunch collects live time and attendance data, which is stored in Blueforce™ and accessible in real time.

EPAY's online time tracking option is easy to set up and deploy, like every aspect of our cloud based time and attendance system!

Easy for Employees

Employees simply log on from their desktop PC or dedicated workstation and enter their ID number. In just a few clicks, employees can:

- Clock in and out for shifts and meal breaks
- Allocate time and assign dollar amounts to tasks and projects
- Review schedules and edit time
- Request PTO and review PTO balances

Hard to Outsmart

IP address tracking prevents employees from logging in from unauthorized PCs. Punches made from non-registered computers are immediately flagged for manager review. Thanks to real-time visibility in Blueforce, managers can tightly manage remote employees, monitoring late arrivals, absences and more.

Highly Adaptable

WebPunch online time tracking is ideal for office settings and professional facilities. WebPunch can be used in conjunction with our biometric time clocks, mobile time tracking app with GPS and telephone time tracking options.



*Instantly Turn Existing
PCs Into Secure Time
Tracking Systems—
No Hardware or IT
Assistance Required!*

**Put WebPunch to Work for You!
Get Started Today**

**877.800.3729 ext. 9020
Sales@EPAYsystems.com
www.EPAYsystems.com**

MOBILE PUNCH WITH GPS VERIFICATION



Time Tracking & Workforce Management in an Easy-to-Use Mobile App

EPAY's native-developed time tracking app provides an easy and affordable solution for managing the workforce that's always in motion. Equipped with Geo-fencing and Geo-tracking, Mobile Punch™ keeps you in the loop even when you're miles away.

How it Works

With the simple touch of a button, employees can clock in and out for work right from a mobile device. Online or offline, Mobile Punch captures the date, time and GPS location of a punch. Time tracking data is available in real-time, giving you complete visibility into your workforce.

Easy for Employees

- Clock in/out for shifts and breaks with instant confirmation of punch details
- Record worksite, task or work ticket information
- View schedules, request paid time off and check PTO balances

Hard to Outsmart

- Capture punch date, time and GPS location even when cell service is down
- Review exceptions in real-time when a punch is made outside an acceptable radius
- Require workers to capture a photo of themselves when they clock in/out
- Automatically clock out employees when they leave a designated work area
- Record employee geo-coordinates or check points at defined intervals

Highly Adaptable

- Track allocated hours worked by department and/or task
- Customize fields to track additional information (tips, mileage, rooms cleaned, etc.)
- Collect punches or job/task information with bar code or QR code scanner

Compliance Protection

- Require workers to answer a "safe workday" question at clock-out
- Capture digital signatures upon sign-off of a completed task or shift

- **Configurable for use by single employees, work crews or managers**
- **Compatible with GPS-enabled iOS® and Android® devices**
- **Free tech support 24/7/365**

Put Mobile Punch to Work for You!

877.800.3729 ext. 9020
sales@EPAYsystems.com
www.EPAYsystems.com



RECRUITING AND APPLICANT TRACKING SOFTWARE

EPAY HUMAN CAPITAL MANAGEMENT

Smarter, Speedier Recruiting and Applicant Tracking

How many hours does it take your HR staff to fill a single open position? Posting on job boards? Reviewing and ranking hundreds of resumes? Achieving managerial consensus on hiring decisions? With EPAY's human capital management system, it's a whole lot easier and at least 30% faster!

Accelerate the Hiring Process

Our recruiting and applicant tracking allows you to quickly post jobs across leading job boards and social networks, pre-screen and rank applicants, compile interview feedback, and bring hiring managers together in one place to make swift, collective hiring decisions.



Expand Your Candidate Pool

Post open positions to your website and popular job boards like Indeed, Simply Hired, CareerBuilder, Monster, and LinkedIn, expanding your candidate pool in a couple of clicks.



Easily Identify Qualified Applicants

Quickly target the most qualified candidates with pre-screening questions, advanced search, and rating capabilities. You can also classify and sort applications and tag them for easy lookback.



Manage Everything from One Location

Capture assessment results, applicant certifications, and manager feedback. Then request background checks and send offer letters—all from within the candidate's profile.



Stay in Constant Communication with Candidates

Send custom emails or set up auto-generated emails to stay in communication with applicants throughout each stage of the hiring process.



Get All Your Decision Makers on the Same Page

Accommodate an unlimited number of users, so all your managers have access to complete candidate profiles. That means faster consensus on hiring decisions.

Jumpstart New Hire Onboarding

EPAY's recruiting and applicant tracking system is part of our unified human capital management platform, so employee data is shared across all HR modules. Once an applicant is hired, their profile is seamlessly converted into an employee master record—in just one click!

**Accelerated hiring.
Seamless onboarding.**



That's the EPAY difference. Request a demo today!



MISSION^{ML}
ACCURACY ▲ SECURITY ▲ HITL

As a government agency, you are probably told many things about your data you already know. Too much data, not enough actionable intelligence. Too many silos, too few areas where systems can communicate to draw out patterns and trends. Too little structure, too little time.

The Drumbeat Is Endless.

What you may not know is that the power of Machine Learning, harnessed through Figure Eight's platform for high quality training data, can help.

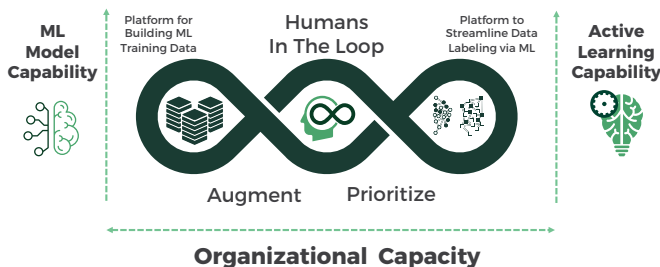
The Problem We Solve

Your data is an asset, but one that requires significant investment to yield value. Data science and algorithms are an answer, but an incomplete one. Data scientists can't easily scale, and the dirty little secret in data science is that algorithms aren't worth much without training data.

As DJ Patil, former US Chief Data Scientist said, "The hardest part of data science is getting good, clean data. Cleaning data is often 80% of the work." What if you could reduce that time spent?

How We Do It

Getting good, clean data is a difficult process. Figure Eight's platform enables data science teams of all sizes to collect, clean and label massive datasets to train machine learning models. Our platform combines the best of human and machine intelligence to enrich data, and to enhance the data labeling experience. We're fast, accurate, scalable and flexible.



100 Million+ Images Labeled
10 Billion+ Human Judgments

- 1 Content Moderation**
Moderate and tag content with human insight
- 2 Data Categorization, Collection and Validation**
Collect, validate and improve data for ML purposes
- 3 Image Annotation**
Label imagery to train computer vision models
- 4 Search Relevance**
Optimize conversions from search results
- 5 Sentiment Analysis**
Enhance algorithmic scoring with human intelligence
- 6 Transcription**
Capture video, audio and transcribe for meaningful analysis



"Let the machines do what machines do well. Let humans do what only humans can do."

-Gen. Jack Shanahan

Enabling the Entire Government Organization through ML Training Data

Senior Management

SITUATIONAL AWARENESS

WHO: Organizational Leaders

WHAT: What are my problems, and what are my resources to solve them?

HOW: Our ML Active Learning Environment feeds mission-critical algorithms to flag problems, mitigating risks and increase your overall impact.



Program Managers

PROACTIVE PLANNING

WHO: Problem Owners

WHAT: How do I get ahead of the problems my organization is facing?

HOW: Our ML Active Learning Environment helps you to prioritize through effective algorithms, automating tasks so you can focus on critical program objectives.

Technical Resources

INFORMATION INTEGRATION & ANALYSIS

WHO: Analysts, Specialists & Deputy Program Managers

WHAT: How do I leverage all of my data assets to create actionable intelligence?

Field Personnel

DATA DRIVEN DECISION MAKING

WHO: Public Facing Problem Solvers

WHAT: How do I focus on what I need to know?

HOW: Our ML Active Learning Environment can create training data closest to your problem, fueling the most effective algorithms to respond.



Test and learn with multiple options & use your ML training data to pick the best one.



Solving The Problem of ML Training Data

Unstructured, Incomplete Data



1) Pilot



2) Fully designed pilot



Benefits:

- **Quality** - Automated quality control systems
- **Product** - Platform tooling evolves with client demand
- **Scalability** - 100+ channels, customizable/segments labor pools
- **Security** - Enterprise Grade Security via NDA Channel capability, secure campuses, secure workforces and classified instances.

Active Learning Environment

3) Launched pilot



4) Full implementation



5) Success & Ongoing support



- Quality Control
- Security
- Human Intelligence
- Monitoring & Reporting
- Active Learning



Solution Showcase

HCL BigFix

Seven Must-have Endpoint Management Capabilities

Date: September 2019 **Author:** Dave Gruber, Senior ESG Analyst

Abstract:

- When endpoint management systems are effectively integrated with security and IT operations tools, they play a major role in proving compliance, stopping threats, consolidating tools, and protecting brands.
- Since most cyber-attacks leverage known vulnerabilities, IT operations and security organizations need to collaborate to quickly address security risks that threaten the organization.
- Patch management, security configuration and compliance, software distribution, and inventory are core IT infrastructure capabilities that need to interoperate with the rest of the IT operations and security toolset. Organizations that want to tighten security should consider BigFix for its rich endpoint management capabilities and the ability to easily integrate with other IT and security tools, helping IT operations and security teams to collaborate more effectively.

Overview

Endpoints represent the operational engine that enables the modern knowledge worker to perform. Disruption to these systems impacts both individual productivity and the collaboration of teams, slowing overall business operations. A leading cause of systems disruption today comes from security-related attacks, which affect wholesale system function, and result in degradation in operational performance.

Modern attacks often leverage known vulnerabilities in software for which patches and remediation actions already exist. Misconfigured systems also provide a means of attack. Organizations can prevent cyber-attacks and costly data breaches by keeping current with operating system and application patches together with implementing configuration management to enforce compliance with standard security guidelines. IT teams therefore need a continuous, precise inventory of all endpoints, software, and configuration details across their environment. Using this inventory, IT teams can ensure these systems are: kept current with the latest OS and application patches; license- and regulatory-compliant; and securely configured.

Since security teams are typically responsible for the detection of vulnerabilities while IT operations teams are responsible for remediation, effective collaboration between these teams is imperative for business continuity. A properly implemented endpoint management system (EMS) can provide a collaborative platform for both IT operations and security

that enhances the overall security posture. To accomplish this, these solutions must be comprehensive, nimble, and integrated with IT and security infrastructure. They must enable rapid, consistent remediation of threats across all endpoints while continuously verifying that all endpoints are patched and compliant.

This paper will explore the challenges associated with endpoint management, the key capabilities needed, and a recommended solution.

Challenges

Perimeter defenses are no longer enough; endpoints themselves are now part of the attack surface. With a **continuously growing attack surface**—including new types of endpoints, servers, devices, and applications—**IT teams are struggling to keep up with configuration, patching, and compliance management**. This issue increases the risk of compromise due to exposed vulnerabilities in unpatched and misconfigured systems. Timely patching is critical to stay ahead of attackers. Without an effective endpoint management strategy and process, organizations will fail to secure their environment.

As security teams increase their use of threat detection and response tools, **the amount of work required to remediate identified threats overwhelms many IT organizations**. For example, when CVEs are released, security teams first need to assess the level of risk by identifying how many systems are impacted and prioritizing remediation actions based upon the severity of the vulnerability or threat. Threat remediation is “unplanned” work for most IT teams, often creating a growing backlog of unfinished IT expansion projects due to the distraction created by threat remediation. The question of “How do we fix what we find?” is all too common today.

Roaming endpoints and cloud-based endpoints are not seen by many endpoint management systems, creating a growing management challenge. While mobile device management solutions provide some needed capabilities, few have the scalability required to effectively manage endpoints, regardless of which operating system they are running, where they are located, or how they are connected.

Ensuring that security tools are installed, current, and active is critical to securing the infrastructure. However, continuous monitoring and automated remediation of rogue systems is challenging, especially with today’s highly mobile workforce.

Compliance management requires visibility into endpoint configuration and software inventory. With the growing diversity in endpoints, this level of consolidated visibility is challenging at best.

IT teams are struggling to keep up with configuration, patching, and compliance management.

Timely patching of security and configuration vulnerabilities can be the difference between a compromised system and an uncompromised one. When security tools identify issues, integration with EMS tools becomes critical to rapidly prioritize and remediate vulnerabilities. Yet few organizations have integrated these tools, leading to slower remediation times.

Supply chain vendors are progressively asking for **verification that systems and software are compliant with specific industry regulations**. Compliance is all too often thought of as an event. Organizations would be better served to verify compliance on an ongoing and continuous basis.

Reporting compliance verification to senior management and auditors can be challenging without continuous monitoring tools. Besides tracking, analyzing, and reporting on the current status of patching activities across all endpoints, IT organizations need to track compliance history as an overall percentage—a meaningful metric to gauge the progress of compliance efforts over time.

What's Needed

These **seven endpoint management capabilities** help operations and security teams to gain needed visibility, stop threats, and prove compliance, all while consolidating tools:

1. **Comprehensive visibility.**

- Rapid, continuous endpoint discovery and precise software and configuration inventory.
- Easy-to-visualize reporting with historical trending (compliance, inventory, and deviation).
- Drift detection and alerting.

2. **Ease of management.**

- Reliable, consistent software distribution.
- Fast, reliable patching, with high first-pass success rates.
- Configuration updates and verification.
- Automated software provisioning.

3. **Continuous security hygiene.**

- Continuous monitoring and patching.
- Configuration drift detection and remediation.
- Enforcement of security policies.

4. **Continuous compliance.**

- Continuous monitoring and verification of software and configuration against policy and regulations.
- Enforcement of regulatory policies.

5. **Roaming endpoint management.**

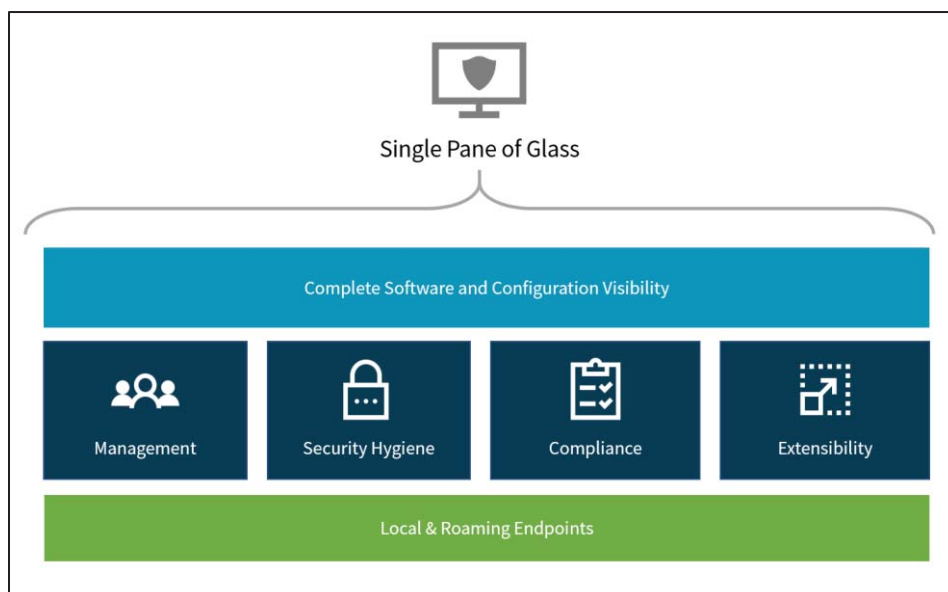
- Precise configuration control of remote endpoints.

6. **Extensibility and integration with existing infrastructure.**

- Out-of-the-box integrations with security tools, including endpoint protection platform (EPP) and security information and event management (SIEM) tools.
- APIs that expose all aspects of endpoint management to drive automation.

7. **A single pane of glass across the endpoint fleet.**

- Common view of all system assets, regardless of operating system, location, or connection type.



HCL BigFix: A Collaborative Endpoint Management and Security Platform

HCL BigFix is a full-feature endpoint management and security system currently deployed on and managing over 100M endpoints worldwide. It provides a turnkey approach to asset discovery, software distribution, and OS provisioning, leading to secure and compliant systems, regardless of operating system, location, or connectivity.

Discover assets rapidly (hardware and software inventory, software license and usage, and compliance reporting).

- Rapidly inventory endpoints across multiple operating systems, identifying all endpoints while providing accurate and current information about the installed software, software usage, and configuration.
- Gain near-real time visibility into endpoint information from an individual device or from groups of endpoints using BigFix Query.
- Identify unmanaged endpoints including potentially rogue devices connected to the network.

Manage easily (software patching, distribution, and provisioning).

- Quickly deploy and patch operating systems and third-party software with high first-pass success rates.
- Reduce annual software spend by assessing application usage and licensing.
- Manage secure configuration across all endpoints, including roaming remote systems.
- Share a common view of all hardware and software assets with both IT and security teams.

“BigFix is like an aircraft carrier. It is central to our solution and is the platform that we have built upon to rapidly deliver value to our customers. We chose BigFix because of its flexibility and its ability to easily integrate with all aspects of our solution.”

John Livingston, CEO, Verve Industrial Protection

Secure continuously (continuous monitoring and patching, enforcement of security policies, and proper configuration).

- Continuously monitor, patch, and enforce security policies across all endpoints, regardless of operating system, location, or connection type.
- Keep cloud-based endpoints, remote servers, and roaming (internet-facing) endpoints updated, secure, and always properly configured.

Enforce compliance in real time.

- Improve compliance reporting by providing out-of-the-box support for security benchmarks published by CIS, DISA, STIG, USGCB, and PCI-DSS.
- Enable endpoint compliance across Windows, UNIX, Linux, and Macintosh operating systems.
- Continuously monitor and enforce endpoint security configurations to ensure compliance with regulatory or organizational security policies.

Manage remote endpoints.

- Get full visibility of your servers, desktops, and laptops, regardless of location, connection, type, or status.
- Manage and patch both on-prem and internet-facing endpoints.
- Discover unmanaged assets to quickly bring them under management.

Integrate seamlessly.

- Integrate with endpoint detection and response (EDR) tools to help security teams better identify threats and operations teams remediate endpoints at scale.

- Integrate with network access control software (VPN clients, firewalls, etc.) to quarantine endpoints and enforce compliance.
- Enable SOC teams to see endpoint data within their existing security information and event management (SIEM) and incident response tools. Accelerate and improve incident response through discovery, enrichment, and automated response.
- Use a rich set of APIs to customize and automate endpoint management activities.

“BigFix is an incredibly powerful and versatile tool and has huge power to be customized. The ease of integrating BigFix with other tools has proven to be one of its most powerful strengths.”

Stacy Lee, Information Security Systems Specialist, Stanford University

Provide common view of assets.

- With BigFix’s single console and single platform, IT operations and security organizations can collaborate more effectively to cut operational costs, compress endpoint management cycles, enforce compliance in real time, and improve productivity.

Using BigFix, security and infrastructure teams can see and act on the same endpoint data without switching between multiple applications, saving them time and accelerating decision making. IT operations and security teams can collaborate more effectively to cut operational costs, compress endpoint management cycles, and enforce compliance in real time while improving productivity.

The Bigger Truth

Endpoint management software plays a critical role in both security and compliance strategies. With an ever-changing attack surface in most organizations, securing endpoints is an almost impossible task without automating the inventory, patching, and configuration process.

EMS is a core component of IT infrastructure, and as such, must facilitate integration with the many other risk management systems that are operating in the security stack. This integration is paramount to enabling both IT and security teams to keep up with the rapidly expanding threat landscape.

While there are many patching solutions available today, organizations should closely evaluate options to ensure they offer robust capabilities supporting both security and compliance requirements, while offering the scalability, flexibility, and extensibility to support organizational growth and complexity.

HCL BigFix, widely recognized as a leading endpoint management software solution, meets or exceeds the seven endpoint management capabilities and should therefore be strongly considered when organizations are adding or upgrading their EMS.

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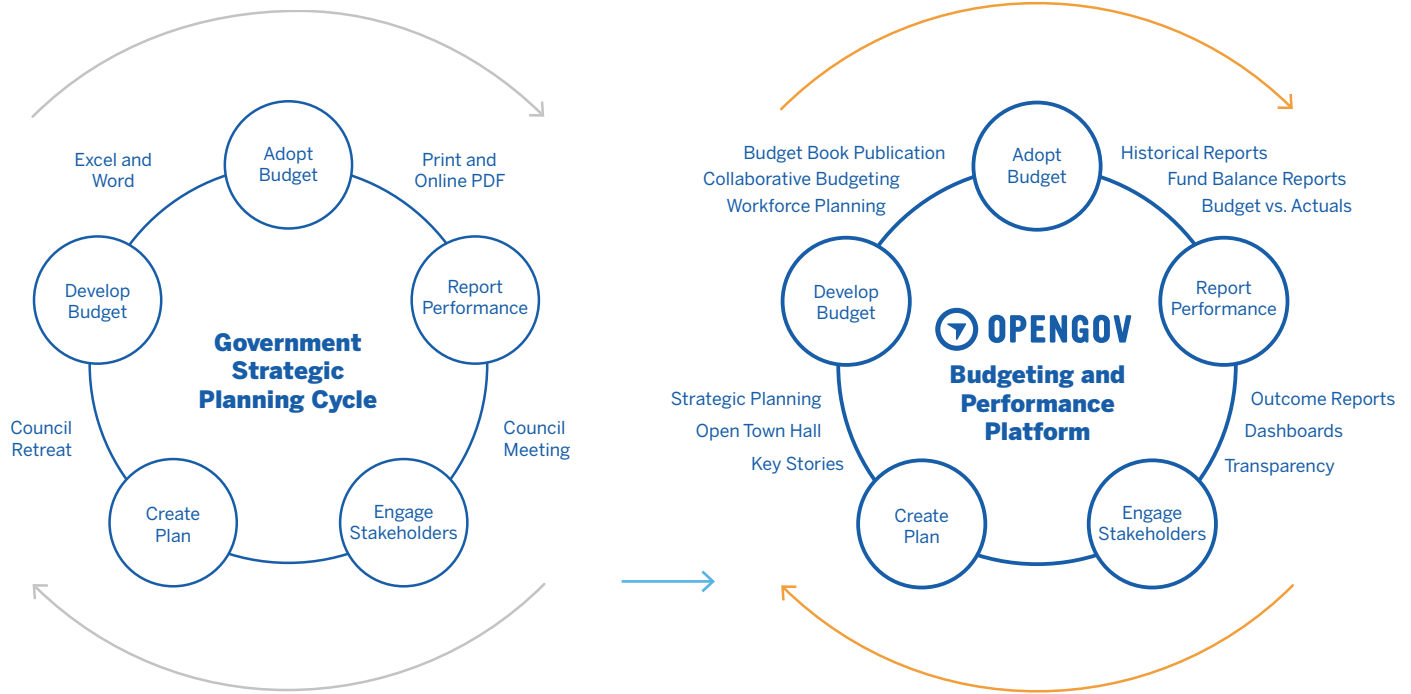


Why OpenGov?

10 Reasons Governments Choose OpenGov

- 1 OpenGov powers Budgeting, Operational Performance, and Citizen Engagement for over 2,000 governments.** We are the clear market leader in growth due to the public sector's rapid adoption of our integrated Budgeting and Performance platform.
- 2 OpenGov's mission is to Power More Effective and Accountable Government.** Our purpose is to empower every government with the nation's best Budgeting and Performance technology to future-proof against escalating budget pressures, citizen demands, staff shortages, and economic competition.
- 3 OpenGov provides the only integrated Budgeting, Operational Performance, and Citizen Engagement solution** with workforce planning, collaborative budgeting, multi-year budgeting, budget book publication, historical reporting, fund balance reporting, budget versus actuals reporting, outcome reporting, dynamic dashboards, transparency and open data portals, online town halls, surveys, and instant landing page capabilities.
- 4 OpenGov Employees have served in public sector positions for over 200 years collectively.** This unique expertise informs how we build technology and how we do business with government.
- 5 OpenGov is made in America.** Nearly 70 U.S.-based professionals are tasked with envisioning and building the market-leading Budgeting and Performance solution, leveraging the best technology available. Our multi-tenant SaaS platform is built for government and designed for zero downtime, zero customization requirements, immediate access to new capabilities, rapid implementation in weeks (not months), and maximum time-to-value.
- 6 OpenGov is 100% focused on government.** OpenGov is purely focused on delivering mission-critical Budgeting and Performance technology to address the unique challenges public servants face daily.
- 7 OpenGov's Budgeting and Performance platform seamlessly aggregates government data** from ERP, Excel, HRIS, Performance, Public Safety, 311, Permitting, Public Records, and countless other data sources, transforming complex financial and performance data into actionable insights. With it, governments can now tie budget dollars to strategic outcomes, promote data integrity, and streamline citizen engagement.
- 8 OpenGov's Budgeting and Performance platform is available on pre-competed public sector contracts,** including NASPO ValuePoint, US Communities, Texas DIR, California Software Licensing Program (SLP), National IPA, and is also available on the GSA and dozens of other state-based agreements.
- 9 OpenGov drives ROI for government.** Current customers spend 50% less time on budget development, achieve 80% time savings on reporting, spend 20% less time on information requests, and have re-allocated up to 1% of their budgets for more strategic outcomes.
- 10 OpenGov has analyzed over \$10 Trillion** in expenses and revenues in its Budgeting and Performance platform over the past 6 years.

We are Powering More Effective and Accountable Government.



Traditional Government

- Financial and performance data silos
- Isolated budgeting and planning process
- Dangerous uncertainty about true workforce costs
- Budget not aligned to strategic initiatives
- Tedious budget book publication process
- Performance is a difficult concept to implement
- Cannot easily add context and communicate initiatives
- Ineffective internal and public meetings impede engagement
- Raw citizen-facing data does not promote transparency

Modern Government

- Fully-integrated financial and performance data
- Collaborative budgeting and planning process
- Fully-detailed personnel costs and workforce plans
- Budget tagged to key strategic outcomes
- Automated budget book publication
- KPI reports and dashboards to contextualize data
- Context-rich initiatives in interactive web pages
- Online forums and surveys to improve engagement
- Modern internal reporting and external data sharing capabilities.

Big Data Success, Without Big Data Complexity

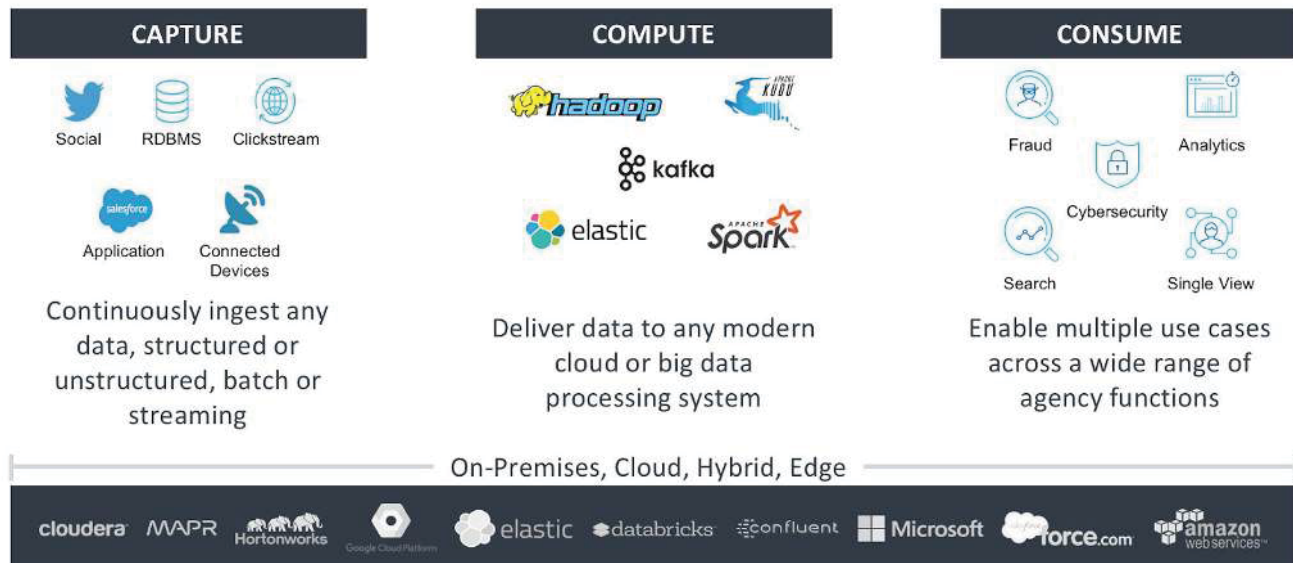
Today, to improve outcomes and meet mission needs agencies are expected to leverage growing amounts of structured and unstructured data to deliver on machine learning and advanced analytics projects. Unfortunately, the so-called “data supply chain” is exploding, demanding that teams put together unforeseen amounts and types of data using a highly complex set of data processing platforms.

This sprawl of technology makes it extremely difficult to efficiently design and reliably run data pipelines on a

continuous basis. Moreover, the frequent changes made to the data supply chain create *data drift*, unexpected flux in data formats and semantics that break pipelines and pollute the data. In the end, agency teams spend more time on updating the data architecture, and less harnessing the insight it was built to deliver.

The work needed to ingest data between disparate databases, platforms, and applications is complex, time consuming, and risky. StreamSets solves this problem, offering an easy-to-use platform to build and manage the complexity inherent in today’s data architectures

What does StreamSets do?



Benefits

ACCELERATE DEVELOPMENT

- Intuitive graphical user interface and connectivity to leading data systems
- Transform and merge data with built in processors
- Extensible to leverage custom built code

INSULATE FROM CHANGE

- Automatically detect and adapt to data format changes
- Move data continuously regardless of change to underlying infrastructure

OPERATE WITH CONFIDENCE

- Data accuracy and performance metrics at any stage of data movement
- Detect, protect and govern sensitive data as it moves



wdesk

We help teams
work smart.

Connect people,
data, and process.

workiva

Save time, reduce risk, make better decisions.

Organizations are constantly challenged to provide greater performance on shorter timelines—often with the same or fewer resources. This is not a trend. This is the new norm.

Finance, accounting, compliance, operations, and other functions must find applications and processes to meet these new challenges. The aging systems most departments use fall short. People need better solutions.

Wdesk is the alternative to inefficient legacy systems. It is a cloud solution for collaborative work management. The platform is proven to increase productivity and drive better decision-making for more than 2,700 organizations worldwide.

Make better decisions, faster

Users have access to a single source of truth. When something changes, everyone knows—reducing the risk of incorrect information. Time previously used to check facts can be spent on analysis and other valuable activities.

Be more confident in your data

Data is always controlled and consistent. Audit trails inform you where data came from, who handled it, and where else it has been used. When you use information from Wdesk, you can be certain you have the right answers.

Work together with purpose

No matter how complex a process is or how much data you have, Wdesk makes it easier to control. It is accessible anywhere, and users get routine cloud delivery of new features and functionality.

What does Wdesk provide?

The Wdesk platform drives a powerful range of features.



FLEXIBLE DATA MANAGEMENT

Data that exists outside of Wdesk, whether structured or unstructured, is easily brought into the platform. This creates a single source of truth for users. They can use and reuse that information, providing a consistent story across all of the work in Wdesk.



INTUITIVE, FAMILIAR INTERFACE

Wdesk is easy to use—any level of user can begin working without special training. The platform powers documents, workbooks, presentations, dashboards, and other familiar content types.



COLLABORATION AT SCALE

Wdesk drives collaboration whether in small teams or enterprisewide initiatives. Set controls so each user can access as much or as little information as needed.



WORKFLOW AND TASKING

Users configure step-by-step workflows for processes in Wdesk. Tasking features let users assign approvals, reviews, requests, and other functions. Wdesk makes it easy to get work done on deadline.



DATA CONSISTENCY

Data within Wdesk, whether native or imported, is connected across the platform. When changes occur, users can trust that numbers and narrative are automatically updated without manual work.



HISTORY AND AUDIT TRAIL

A history trail is automatically created and saved any time a change is shared in Wdesk. Everything that happens in Wdesk leaves a record. Whether it's an update to a single cell or major changes to a project, you know what's happening.



VERSION CONTROL

Everyone has access to the latest version. Wdesk eliminates check-out systems, email trails, and handwritten notes. Simultaneous, controlled collaboration means everyone has the right information.



PEOPLE, GROUPS, AND SECURITY

A single platform means processes and content coexist. Set access and permissions, so users see as much or as little as needed. Security can scale to accommodate the needs of small teams or the demands of full enterprises.



ALWAYS ACCESSIBLE

Wdesk is a cloud platform—it is accessible anywhere you have an internet connection. Whether you're on a laptop, tablet, or mobile phone, you have access to the information you need. Users fit work into their lives, instead of fitting their lives around work.

About us

Workiva (NYSE:WK) is a leading provider of enterprise cloud solutions for improving productivity, accountability, and insight into business data. Thousands of organizations, including over 70 percent of the 500 largest U.S. corporations by total revenue, use Wdesk. For more information, visit workiva.com.

Proven solutions



Finance and accounting

Performance reporting | Budget, planning, and forecasting | Financial reporting



Audit and controls

SOX compliance | Internal controls management | Audit management



Risk and compliance

SEC and SEDAR reporting | Investor relations | Risk management



Build your own

Create your own solution built on the flexible Wdesk platform.
Connect Wdesk with other service providers from our partner program.

Proven support

We have deep knowledge of financial and accounting standards, regulatory frameworks, and other business operations. Each Workiva customer has a dedicated Customer Success Manager (CSM) available as an extension of his or her team.

What our customers say



Once you understand what Wdesk is capable of doing, it almost feels like the possibilities are limitless. You start to look at things differently. It can help to create your vision and make it a reality.

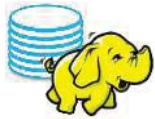
— **Marissa Palmer**, SOX and Compliance Manager, Upland Software



It's clear that Wdesk is the future in financial reporting.

— **Richard Chin**, CEO, Kindred Biosciences, Inc.

Common Use Cases



DATA LAKE REPLATFORMING

Deliver on the promise of big data



CYBERSECURITY

Simplify cyber architecture



CONNECTED DEVICES

Ingest any data directly from devices
in the field

Agency Use Cases



ADVANCED THREAT DETECTION

Ingest more data faster to vastly improve threat analytics
and reporting

Benefits:

- Greater insight into threat origination
- Store more historical data for longer
- Enrich with additional data sources



DATA LAKE REPLATFORMING

Ingest real-time data from health exchanges, issuers, and
state-based marketplaces

Benefits:

- Operational visibility and reporting
- Ad hoc investigation and analytics
- Real-time, single view

Partnering with StreamSets

StreamSets takes the success of our partners very seriously - if you succeed then we succeed. As such, we provide everything you need to make your customers successful from award-winning software to designated partner management resources to solution architect assistance as well as free enablement, access to R&D resources, and more. We've made it easy to partner with us based on how you like to do business. We are looking to build our ecosystem of partners who are able to provide implementation and delivery services around our software. We want you!

Why StreamSets?

StreamSets has built a complete Data Operations platform, enabling agencies to make data movement across data platforms easier. StreamSets lets agencies build dataflows 10 times faster and run them continuously with end-to-end visibility, control and security over data.

The platform uniquely inspects and learns from the data as it passes through. This provides numerous benefits, including automatic handling data drift and detecting and securing sensitive data in-stream for improved security and compliance.

Contact us to learn more: partners@streamsets.com