carahsoft.

General Services Administration
Federal Supply Service   Authorized Federal Supply Schedule Price List

Contractor:
Carahsoft Technology Corp.
11493 Sunset Hills Rd., Suite 100
Reston, VA 20190
Phone: (703) 871-8500   Fax: (703) 871-8505
www.carahsoft.com

Contract Number:
47QSWA18D008F
Multiple Award Schedule (MAS)
Period Covered by Contract:
August 22, 2018 – August 21, 2028

Authorized Special Item Numbers (SINs):

Special Item No. 33411:	Purchasing of new electronic equipment
Special Item No. 511210:	Software Publishers
Special Item No. 518210C:	Cloud and Cloud-Related IT Professional Services
Special Item No. 532420L:	Leasing of new electronic equipment
Special Item No. 541370GEO:	Earth Observation Solutions
Special Item No. 54151:	Software Maintenance Services
Special Item No. 54151ECOM:	Electronic Commerce and Subscription Services
Special Item No. 54151S:	Information Technology Professional Services
Special Item No. 561422:	Automated Contact Center Solutions (ACCS)
Special Item No. 611420:	Information Technology Training
Special Item No. 811212:	Maintenance of Equipment, Repair Services &/or Repair/Spare Parts
Special Item No. 333429:	3D Printing and Additive Manufacturing Solutions
Special Item No. 518210ERM:	Electronic Records Management
Special Item No. 493110RM:	Physical Records Management Solutions
Special Item No. 3361E:	Electric and Autonomous Vehicles and Accessories
Special Item No. OLM:	Order-Level Materials (OLM)
Special Item No. 518210FM	Financial Management Quality Service Management Office

Online access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!, a menu-driven database system. The Internet address for GSA Advantage! Is https://gsaadvantage.gov

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Contractor Data and Points of Contact

Contractor's Point of Contact for Contract Administration

Yvonne DLuzen – Contract

Manager Carahsoft

Technology Corp.

11493 Sunset Hills Rd., Suite 100

Reston, VA 20190

(703) 871-8500 (Main) | (703) 871-8505 (fax)

contracts@carahsoft.com

Business Size: **Other than Small**

DUNs Number: **088365767**

Ordering Instructions / Terms and Conditions

1a. Authorized Special Item Numbers (SINs)

Special Item No. 33411: Purchasing of new electronic equipment.
Special Item No. 511210: Software Publishers
Special Item No. 518210C: Cloud and Cloud-Related IT Professional Services
Special Item No. 532420L: Leasing of new electronic equipment
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Special Item No. 54151: Software Maintenance Services
Special Item No. 54151ECOM: Electronic Commerce and Subscription Services
Special Item No. 54151S: Information Technology Professional Services
Special Item No. 561422: Automated Contact Center Solutions (ACCS)
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Special Item No. 3361E: Electric and Autonomous Vehicles and Accessories
Special Item No. OLM: Order-Level Materials (OLM)
Special Item No. 518210FM Financial Management Quality Service Management Office

1b. Lowest Priced Model Number and Price for Each SIN:

Not applicable.

1c. Hourly Rates

See the Terms and Conditions for SIN 54151S on pg. 37, below.

2. Maximum Order

SIN 33411	$500,000
SIN 511210	$500,000

SIN 518210C	$500,000
SIN 532420L	$500,000
SIN 541370GEO	$1,000,000
SIN 54151	$500,000
SIN 541519CDM	$500,000
SIN 54151ECOM	$500,000
SIN 54151S	$500,000
SIN 564122	$500,000
SIN 611420	$250,000
SIN 811212	$500,000
SIN 333429	$750,000
SIN 518210ERM	$1,000,000
SIN 493110RM	$1,000,000
SIN 3361E	$2,000,000
SIN OLM	$250,000
SIN 518210FM	$500,000
SIN 541519CSP	$500,00

3. Minimum Order
$100

4. Geographic Coverage
Domestic and Overseas

5. Point(s) of Production
Varies by Manufacturer

6. Discount from Internal Rate
The GSA Net Price published on GSA Advantage! Reflects the fully burdened price. The negotiated discount has been applied and the Industrial Funding Fee has been added.

7. Quantity Discount
Varies by Manufacturer, as reflected on GSA Advantage!

8. Prompt Payment Terms

Net 30 Days
Information for Ordering Offices: Prompt Payment terms cannot be negotiated out of the contractual agreement in exchange for other concessions.

9. Government Purchase Card
Accepted for sales at or below the micro-purchase threshold.

Acceptance for purchases above the micro-purchase threshold will be determined on a procurement-by-procurement basis.

10. Foreign Items
None

11a. Time of Delivery
SIN 33411: 45 Days after Receipt of Order

SIN 511210: 45 Days after Receipt of Order
SIN 518210C: 45 Days after Receipt of Order
SIN 532420L: 45 Days after Receipt of Order
SIN 541370GEO: 45 Days after Receipt of Order
SIN 54151: 45 Days after Receipt of Order
SIN: 541519CDM: 30 Days after Receipt of Order
SIN 54151ECOM: 45 Days after Receipt of Order
SIN 54151S: 45 Days after Receipt of Order
SIN 561422: 45 Days after Receipt of Order
SIN 611420: 45 Days after Receipt of Order
SIN 811212: 45 Days after Receipt of Order
SIN 333429: 45 Days after Receipt of Order
SIN 518210ERM: 45 Days after Receipt of Order
SIN 493110RM: 45 Days after Receipt of Order
SIN 3361E: 45 Days after Receipt of Order
SIN 518210FM 45 Days after Receipt of Order
SIN 541519CSP 45 Days after Receipt of order

11b. Expedited Delivery

Please contact the Contractor for availability and rates.

11c. Overnight and 2-Day Delivery

Please contact the Contractor for availability and rates.

11d. Urgent Requirements

Agencies can contact the Contractor's representative to affect a faster delivery. Customers are encouraged to contact the contractor for the purpose of requesting accelerated delivery.

12. FOB Point

Destination

13a. Ordering Address

Karina Woods – Operations Manager
Carahsoft Technology Corp.
11493 Sunset Hills Rd., Suite 100
Reston, VA 20190
(703) 871-8519 (telephone)
(703) 871-8505 (fax)
gsaorders@carahsoft.com

13b. Ordering Procedures

For supplies and services, the ordering procedures and information on Blanket Purchase Agreements (BPAs) are found in Federal Acquisition Regulation (FAR) 8.405-3.

14. Payment Address

Jillian Szczepanek
Accounts Receivable Carahsoft Technology Corp.
11493 Sunset Hills Rd., Suite 100
Reston, VA 20190
(703) 871-8614 (telephone)
(703) 871-8505 (fax)
gsapayments@carahsoft.com

15. Warranty Provision
Varies by Manufacturer and Product/Service

16. Export Packing Charges
Not applicable

17. Terms and Conditions of Government Purchase Card Acceptance
Please contact the Contractor for terms and conditions of acceptance.

18. Terms and Conditions of Rental, Maintenance, and Repair (if applicable)
Not applicable

19. Terms and Conditions of Installation
Not applicable

20a. Terms and Conditions of Repair Parts Indicating Date of Parts Price Lists and Any Discounts from List Prices (if available)
Not applicable

20b. Terms and Conditions for Any Other Services
Not applicable

21. List of Service and Distribution Points
Not applicable

22. List of Participating Dealers
The full list of Participating Dealers can be found on the Carahsoft website,
GSA MAS Schedule Authorized Dealers | Carahsoft

23. List of Approved Manufacturer CSAs
Manufactures End-User License Agreements
Additional terms may apply.

24a. Preventative Maintenance
None

24b. Special Attributes such as Environmental Attributes (e.g. recycled content, energy efficiency, and/or reduced pollutants)
None

24c. Section 508 Compliance for Electronic and Information Technology
Varies by Manufacturer

25. Data Universal Number System (DUNS) Number
088365767

26. Notification Regarding Registration in System for Award Management (SAM) Database
Contractor has an Active Registration in the SAM database

27. Labor Category Descriptions and Pricing

See the Terms and Conditions for SIN 54151S beginning on page 37 below.

28. Non-Defective Product Returns

Products are eligible for return or replacement within 30 days of invoice. New and unopened product return requests received more than 30 days after invoice are considered to be out-of-policy return requests. These types of requests will be considered on a case-by-case basis. Any applicable shipping costs are to be paid by the customer.

Table of Awarded Special Item Numbers (SINs)

Authorized Special Item Numbers (SINs)	Title/ Description
33411	Purchasing of new electronic equipment
511210	Software Publishers
518210C	Cloud and Cloud-Related IT Professional Services
532420L	Leasing of new electronic equipment
541370GEO	Earth Observation Solutions
54151	Software Maintenance Services
54151ECOM	Electronic Commerce and Subscription Services
54151S	Information Technology Professional Services
561422	Automated Contact Center Solutions (ACCS)
611420	Information Technology Training
811212	Maintenance of Equipment, Repair Services and/or Repair/Spare Parts
333429	3D Printing and Additive Manufacturing Solutions
518210ERM	Electronic Records Management
493110RM	Physical Records Management Solutions
3361E	Electric and Autonomous Vehicles and Accessories
OLM	Order-Level Materials (OLM)
518210FM	Financial Management Quality Service Management Office (FM QSMO) Core Financial Management (FM) Solutions and IT Professional Services
541519CSP	Credential Service Providers

Special Item Number Information

Special Item No. 33411: Purchasing of New Electronic Equipment

Includes desktop, laptop, tablet computers (including rugged), servers, storage equipment, hyperconverged integrated systems, supercomputers, routers, switches and other communications equipment, IT security equipment (hardware based firewalls), audio and video (AV) equipment, public address systems, monitors/displays, sensors, and other Internet of Things (IOT) devices, printers and Multi-Function Device (MFD) equipment, broadcast band radio, two-way radio (LMR), microwave radio equipment, satellite communications equipment, radio transmitters/receivers (airborne), radio navigation equipment/antennas, optical/imaging systems, and associated peripherals required for operations (such as controllers, connectors, cables, drivers, adapters, etc., ancillary installation of any equipment purchased.

NOTE: Subject to Cooperative Purchasing FSC CLASS 7010 - SYSTEM CONFIGURATION End User Computers/Desktop Computers Professional Workstations Servers Laptop/Portable/Notebook Computers Large Scale Computers Optical and Imaging Systems Other Systems Configuration Equipment, Not Elsewhere Classified

Printers Display Graphics, including Video Graphics, Light Pens, Digitizers, Scanners, and Touch Screens Network Equipment

Other Communications Equipment Optical Recognition Input/Output Devices Storage Devices including Magnetic Storage, Magnetic Tape Storage and Optical Disk Storage Other Input/Output and Storage Devices, Not Elsewhere Classified

FSC CLASS 7035 - ADP SUPPORT EQUIPMENT
ADP Support Equipment

FSC Class 7042 - MINI AND MICRO COMPUTER CONTROL DEVICES
Microcomputer Control Devices Telephone Answering and Voice Messaging Systems

FSC CLASS 7050 - ADP COMPONENTS
ADP Boards

FSC CLASS 5995 - CABLE, CORD, AND WIRE
ASSEMBLIES: COMMUNICATIONS EQUIPMENT
Communications Equipment Cables

FSC CLASS 6015 - FIBER OPTIC CABLES
Fiber Optic Cables

FSC CLASS 6020 - FIBER OPTIC CABLE ASSEMBLES AND HARNESSES
Fiber Optic Cable Assemblies and Harnesses

FSC CLASS 6145 - WIRE AND CABLE, ELECTRICAL
Coaxial Cables

FSC Class 5805 - TELEPHONE AND TELEGRAPH EQUIPMENT
Telephone Equipment Audio and Video Teleconferencing Equipment

FSC CLASS 5810 - COMMUNICATIONS SECURITY EQUIPMENT AND COMPONENTS
Communications Security Equipment

FSC CLASS 5815 - TELETYPE AND FACSIMILE EQUIPMENT
Facsimile Equipment (FAX)

FSC CLASS 5820 - RADIO AND TELEVISION COMMUNICATION EQUIPMENT, EXCEPT AIRBORNE
Two-Way Radio Transmitters/Receivers/Antennas Broadcast Band Radio Transmitters/ Receivers/ Antennas Microwave Radio Equipment/Antennas and Waveguides Satellite Communications Equipment

FSC CLASS 5821 - RADIO AND TELEVISION COMMUNICATION EQUIPMENT, AIRBORNE
Airborne Radio Transmitters/Receivers

FSC CLASS 5825 - RADIO NAVIGATION EQUIPMENT, EXCEPT AIRBORNE

Radio Navigation Equipment/Antennas

FSC CLASS 5826 - RADIO NAVIGATION EQUIPMENT, AIRBORNE
Airborne Radio Navigation Equipment

FSC CLASS 5830 - INTERCOMMUNICATION AND P UBLIC ADDRESS SYSTEMS, EXCEPT AIRBORNE

Pagers and Public Address Systems (wired and wireless transmissions, including background music systems)

FSC CLASS 5841 - RADAR EQUIPMENT, AIRBORNE
Airborne Radar Equipment

FSC CLASS 5895 - MISCELLANEOUS COMMUNICATION EQUIPMENT
Miscellaneous Communications Equipment
Installation (FPDS Code
N070) for Equipment Offered
Deinstallation (FPDS N070)
Reinstallation (FPDS N070)

Special Item No. 511210: Software Publishers

Includes both term and perpetual software

licenses and maintenance. NOTE: Subject to

Cooperative Purchasing

FSC CLASS 7030 - INFORMATION TECHNOLOGY SOFTWARE
Large Scale Computers
- Operating System Software
- Application Software
- Electronic Commerce (EC) Software
- Utility Software
- Communications Software
- Core Financial Management Software
- Ancillary Financial Systems Software
- Special Physical, Visual, Speech, and Hearing Aid

Software Microcomputers
- Software Microcomputers
- Operating System Software
- Application Software
- Electronic Commerce (EC) Software
- Utility Software
- Communications Software
- Core Financial Management Software
- Ancillary Financial Systems Software
- Special Physical, Visual, Speech, and Hearing Aid Software

Special Item No. 518210C: Cloud and Cloud-Related IT Professional Services

Includes commercially available cloud computing services such as Infrastructure as a Service (IaaS), Platform as a Service (PaaS), and Software as a Service (SaaS) and emerging cloud services. IT professional services that are focused on providing the types of services that support the Government's adoption of, migration to or governance/management of Cloud computing. Specific labor categories
and/or fixed price solutions (e.g. migration services, etc.) that support activities associated with assessing Cloud solutions, refactoring workloads for Cloud solutions, migrating legacy or other systems to Cloud solutions, providing management/governance of Cloud solutions, DevOps, developing cloud native applications or other Cloud oriented activities.

NOTE: Subject to Cooperative Purchasing

FSC/PSC Class D305 IT AND TELECOM- TELEPROCESSING, TIMESHARE, AND CLOUD COMPUTING Cloud Computing Services

Table 1: Cloud Computing Services (i.e. IaaS, etc.)

SIN Description	Sub-Categories
- Commercially available cloud computing services - Meets the National Institute for Standards and Technology (NIST) definition of Cloud Computing essential characteristics. - Open to all deployment models (private, public, community or hybrid), vendors specify deployment models	**1. Software as a Service (SaaS):** Consumer uses provider's applications on cloud infrastructure. Does not manage/control platform or infrastructure. Limited application level configuration may be available. **2. Platform as a Service (PaaS):** Consumer deploys applications onto cloud platform service using provider-supplied tools. Has control over deployed applications and some limited platform configuration but does not manage the platform or infrastructure. **3. Infrastructure as a Service (IaaS):** Consumer provisions computing resources. Has control over OS, storage, platform, deployed applications and some limited infrastructure configuration, but does not manage the infrastructure.

NOTE: Offerors may optionally select the single sub-category that best fits each cloud service offering, per Service Model Guidance, or select no sub-category if the offering does not fit an existing NIST service model.

DESCRIPTION OF CLOUD COMPUTING SERVICES (i.e. IaaS, etc.) AND PRICING

a) The information provided below is designed to assist Offerors in qualifying cloud computing services and provide complete descriptions.

b) In addition to standard pricing requirements, all pricing models must have the core capability to meet the NIST Essential Cloud Characteristics, particularly with respect to on-demand self-service, while allowing alternate variations at the task order level at agency discretion, pursuant to the guidance on NIST Essential Characteristics.

Table 2 summarizes the additional Offeror provided description requirements for services proposed under the Cloud
Computing Services (i.e IaaS, etc.). All mandatory description requirements must be complete, and adequate according to evaluation criteria.

In addition, there is one "Optional" reporting descriptions which exists to provide convenient service selection by relevant criteria. Where provided, optional description requirements must be complete and adequate according to evaluation criteria:

1) The NIST Service Model provides sub-categories for the Cloud SIN and is strongly encouraged, but not required. The Service Model based sub-categories provide this SIN with a structure to assist ordering activities in locating and comparing services of interest. Contractors may optionally select the single service model most closely corresponding to the specific service offering.

2) If a sub-category is selected it will be evaluated with respect to the NIST Service Model definitions and guidelines in "Guidance for Contractors".

Table 2: Cloud Service Description Requirements

#	Description Requirement	Reporting Type	Instructions
1	Provide a brief written description of how the proposed cloud computing services (i.e. Iaa S, etc.) satisfies each individual essential NIST Characteristic	Mandatory	The cloud service must be capable of satisfying each of the five NIST essential Characteristics as outlined in NIST Special Publication 800-145. See 'GUIDANCE FOR CONTRACTORS: NIST Essential Characteristics' below in this document for detailed overall direction, as well as guidance on inheriting essential characteristics. The NIST "Measured Service" characteristic requires a minimal "pay as you go" unit of measurement appropriate for the service. In the case of SaaS, the appropriate maximum measured increment of service shall be no more than 30 days per user, or some other equivalent discrete measurement that provides the government with the advantage of frequent (approximately every 30 days) "pay as you go" metering cycles. SaaS products, where consumption is only measured on an annual basis, may better fit under "Term Software License" SIN 132-32. Likewise, offers of any combinations of IaaS, Paa S or any other cloud product services in a bundle or other fashion that do not meet the frequency requirements of approximately 30 - day measurement and billing cycles, will not be accepted as complying with the NIST Measured Service characteristic.
2	Select NIST deployment models for the cloud computing service proposed.	Mandatory	Contractors must select at least one NIST deployment model as outlined in NIST Special Publication 800 - 145 describing how the proposed cloud computing service is deployed. Select multiple deployment models if the service is offered in more than one deployment model. See 'GUIDANCE FOR CONTRACTORS: NIST Deployment Model' below in this document for detailed direction on how to best categorize a service for the NIST deployment models.
3	Optionally select the most appropriate NIST service model that will be the designated sub- category, or may select no sub-category.	Optional	Contractor may select a single NIST Service model to sub-categorize the service as outlined in NIST Special Publication 800-145. Sub- category selection is optional but recommended. See 'GUIDANCE FOR CONTRACTORS: NIST Service Model' below in this document for detailed direction on how to best categorize a service for the NIST Iaa S, Paa S, and Saa S service models.

2) GUIDANCE FOR OFFERORS

This section offers guidance for interpreting the Contractor Description Requirements in Table 2 (above) including the NIST essential cloud characteristics, service models and deployment models. This section is not a list of requirements.

Offeror specific definitions of cloud computing characteristics and models or significant variances from the NIST essential characteristics or models are discouraged and will not be considered in the scope of this SIN or accepted in response to evaluation factors. The only applicable cloud characteristics, service model/subcategories and deployment models for this SIN will be drawn from the NIST 800-145 special publication. Services qualifying for listing as cloud computing services (i.e. IaaS, etc.) under this SIN must substantially satisfy the essential characteristics of cloud computing as documented in the NIST Definition of Cloud Computing SP 800-145[1]

Offerors must select deployment models corresponding to each way the service can be deployed. Multiple deployment model designations for a single cloud service are permitted but at least one deployment model must be selected.

Both Cloud service model (i.e. IaaS, etc.) and deployment model (i.e. public, etc.) designations must accord with NIST definitions. Guidance is offered in this document on making the most appropriate selection

a) NIST Essential Characteristics

General Guidance

NIST's essential cloud characteristics provide a consistent metric for whether a service is eligible for inclusion in this SIN. It is understood that due to legislative, funding and other constraints that government entities cannot always leverage a cloud service to the extent that all NIST essential characteristics are commercially available. For the purposes of the Cloud SIN, meeting the NIST essential characteristics is determined by whether each essential capability of the commercial service is available for the service, whether or not the Ordering Activity actually requests or implements the capability. The guidance in Table 3 offers examples of how services might or might not be included based on the essential characteristics, and how the Contractor should interpret the characteristics in light of current government contracting processes.

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[1] **7** http://csrc.nist.gov/publications/nistpubs/800-145/SP800-145.pdf

Table 3: Guidance on Meeting NIST Essential Characteristics

Characteristic	Capability	Guidance
On-demand self-service	• Ordering activities can directly provision services without requiring Contractor intervention. • This characteristic is typically implemented via a service console or programming interface for provisioning	Government procurement guidance varies on how to implement on-demand provisioning at this time. Ordering activities may approach on-demand in a variety of ways, including "not-to-exceed" limits, or imposing monthly or other appropriate payment cycles on what are essentially on demand services. Services under this SIN must be capable of true on- demand self-service, and ordering activities and Contractors must negotiate how they implement on demand capabilities in practice at the task order level: • Ordering activities must specify their procurement approach and requirements for on- demand service • Contractors must propose how they intend to meet the approach • Contractors must certify that on-demand self-service is technically available for their service should procurement guidance become available.
Broad Network Access	• Ordering activities are able to access services over standard agency networks • Service can be accessed and provisioned using standard devices such as browsers, tablets and mobile phones	• Broad network access must be available without significant qualification and in relation to the deployment model and security domain of the service • Contractors must specify any ancillary activities, services or equipment required to access cloud services or integrate cloud with other cloud or non-cloud networks and services. For example, a private cloud might require an Ordering Activity to purchase or provide a dedicated router, etc. which is acceptable but should be indicated by the Contractor.
Resource Pooling	• Pooling distinguishes cloud services from simple offsite hosting. • Ordering activities draw resources from a common pool maintained by the Contractor • Resources may have general characteristics such as regional location	• The cloud service must draw from a pool of resources and provide an automated means for the Ordering Activity to dynamically allocate them. • Manual allocation, e.g. manual operations at a physical server farm where Contractor staff configure servers in response to Ordering Activity requests, does not meet this requirement • Similar concerns apply to software and platform models; automated provisioning from a pool is required • Ordering activities may request dedicated physical hardware, software or platform resources to access a private cloud deployment service. However the provisioned cloud resources must be drawn from a common pool and automatically allocated on request.
Rapid Elasticity	• Rapid provisioning and de- provisioning commensurate with demand	• Rapid elasticity is a specific demand-driven case of self-service • 'Rapid' should be understood as measured in minutes and hours, not days or weeks. • Elastic capabilities by manual request, e.g. via a console operation or programming interface call, are required. • Automated elasticity which is driven dynamically by system load, etc. is optional. Contractors must specify whether automated demand-driven elasticity is available and the general mechanisms that drive the capability.

Measured Service	• Measured service should be understood as a reporting requirement that enables an Ordering Activity to control their use in cooperation with self service	• Procurement guidance for on-demand self-service applies to measured service as well, i.e. rapid elasticity must be technically available but ordering activities and Contractors may mutually designate other contractual arrangements. • Regardless of specific contractual arrangements, reporting must indicate actual usage, be continuously available to the Ordering Activity, and provide meaningful metrics appropriate to the service measured • Contractors must specify that measured service is available and the general sort of metrics and mechanisms available • The goal of the Measured Service requirement is to ensure Ordering Activities realize the full benefit of "pay as you go" consumption models. Consumption measurements that are not discrete enough or frequent enough (greater than 30 days), will not fulfill this NIST essential characteristic and will not be eligible for inclusion in this SIN.

Inheriting Essential Characteristics

Cloud Services (i.e. Iaa S, etc.) may depend on other cloud services, and cloud service models such as PaaS and SaaS are able to inherit essential characteristics from other cloud services that support them. For example a PaaS platform service can inherit the b road network access made available by the IaaS service it runs on, and in such a situation would be fully compliant with the broad network access essential characteristic. Cloud Services (i.e. IaaS, etc.) inheriting essential characteristics must make the inherited characteristic fully available at their level of delivery to claim the relevant characteristic by inheritance.

Inheriting characteristics does not require the inheriting provider to directly bundle or integrate the inherited service, bu t it does require a reasonable measure of support and identification. For example, the Ordering Activity may acquire an IaaS service from "Provider A" and a PaaS service from "Provider B". The PaaS service may inherit broad network access from "Provider A" but must identify and support the inherited service as an acceptable IaaS provider.

Assessing Broad Network Access

Typically broad network access for public deployment models implies high bandwidth access from the public internet for authorized users.
In a private cloud deployment internet access might be considered broad access, as might be access through a dedicated shared high bandwidth network connection from the Ordering Activity, in accord with the private nature of the deployment model.

Resource Pooling and Private Cloud

All cloud resource pools are finite, and only give the appearance of infinite resources when sufficiently large, as is sometimes the case with a public cloud. The resource pool supporting a private cloud is typically smaller with more visible limits. A finite pool of resources purchased as a private cloud service qualifies as resource pooling so long as the resources within the pool can be dynamically allocate d to the ultimate users of the resource, even though the pool itself appears finite to the Ordering Activity that procures access to the pool as a source of dynamic service allocation.

1) NIST Service Model
The Contractor may optionally document the service model of cloud computing (e.g. Iaa S, Paa S, Saa S, or a combination thereof, that most closely describes their offering, using the definitions in the NIST Definition of

Cloud Computing SP 800 -145. The following guidance is offered for the proper selection of service models.

NIST's service models provide this SIN with a set of consistent sub-categories to assist ordering activities in locating and comparing Cloud services (i.e. Iaa S, etc.) of interest. Service model is primarily concerned with the nature of the service offered and the staff and activities most likely to interact with the service. Contractors should select a single service model most closely corresponding to their proposed service based on the guidance below. It is understood that cloud services can technically incorporate multiple service models and the intent is to provide the single best categorization of the service.

Contractors should take care to select the NIST service model most closely corresponding to each service offered. Contractors should not invent, proliferate or select multiple cloud service model sub-categories to distinguish their offerings, because ad-hoc categorization prevents consumers from comparing similar offerings. Instead vendors should make full use of the existing NIST categories to the fullest extent possible.

For example, in this SIN an offering commercially marketed by a Contractor as "Storage as a Service" would be properly characterized as Infrastructure as a Service (Iaa S), storage being a subset of infrastructure. Services commercially marketed as "LAMP as a Service" or "Database as a Service" would be properly characterized under this SIN as Platform as a Service (Paa S), as they deliver two kinds of platform services. Services commercially marketed as "Travel Facilitation as a Service" o r "Email as a Service" would be properly characterized as species of Software as a Service (Saa S) for this SIN.

However, Contractors can and should include appropriate descriptions (including commercial marketing terms) of the service in the full descriptions of the service's capabilities.

When choosing between equally plausible service model sub-categories, Contractors should consider several factors:

a) Visibility to the Ordering Activity. Service model sub-categories in this SIN exist to help Ordering Activities match their requirements with service characteristics. Contractors should select the most intuitive and appropriate service model from the point of view of an Ordering Activity.

b) Primary Focus of the Cloud Service (i.e. Iaa S, etc.). Services m ay offer a mix of capabilities that span service models in the strict technical sense. For example, a service may offer both Iaa S capabilities for processing and storage, along with some Paa S capabilities for application deployment, or Saa S capabilities for specific applications. In a service mix situation the Contractor should select the service model that is their primary focus. Alternatively contractors may choose to submit multiple service offerings for the SIN, each optionally and separately subcategorized.

c) Ordering Activity Role. Contractors should consider the operational role of the Ordering Activity's primary actual

d) consumer or operator of the service. For example services most often consumed by system managers are likely to fit best as Iaa S; services most often consumed by application deployers or developers as Paa S, and services most often consumed by business users as Saa S.

e) Lowest Level of Configurability. Contractors can consider Iaa S, Paa S and Saa S as an ascending hierarchy of complexity, and select the model with the lowest level of available Ordering Activity interaction. As an example, virtual machines are an Iaa S service often bundled with a range of operating systems, which are Paa S services. The Ordering Activity usually has access to configure the lower level Iaa S service, and the overall service should be considered Iaa S. In cases where the Ordering Activity cannot configure the speed, memory, network configuration, or any other aspect of the Iaa S component, consider categorizing as a Paa S service.

Cloud management and cloud broker services should be categorized based on their own characteristics and not those of the othe r cloud services that are their targets. Management and broker services typically fit the Saa S service model, regardless of whether the services they manage are Saa S, Paa S or Iaa S. Use

Table 3 to determine which service model is appropriate for the cloud management or cloud broker services, or, alternately choose not to select a service model for the service.

The guidance in Table 4 offers examples of how services might be properly mapped to NIST service models and how a Contractor should interpret the service model sub-categories.

Table 4: Guidance on Mapping to NIST Service Models

Service Model	Guidance
Infrastructure as a Service (IaaS)	Select an IaaS model for service based equivalents of hardware appliances such as virtual machines, storage devices, routers and other physical devices. • IaaS services are typically consumed by system or device managers who would configure physical hardware in a non-cloud setting • The principal customer interaction with an IaaS service is provisioning then configuration, equivalent to procuring and then configuring a physical device. Examples of IaaS services include virtual machines, object storage, disk block storage, network routers and firewalls, software defined networks. Gray areas include services that emulate or act as dedicated appliances and are directly used by applications, such as search appliances, security appliances, etc. To the extent that these services or their emulated devices provide direct capability to an application they might be better classified as Platform services (PaaS). To the extent that they resemble raw hardware and are consumed by other platform services they are better classified as IaaS.

Platform as a Service (PaaS)	Select a PaaS model for service based equivalents of complete or partial software platforms. For the purposes of this classification, consider a platform as a set of software services capable of deploying all or part of an application. ● A complete platform can deploy an entire application. Complete platforms can be proprietary or open source ● Partial platforms can deploy a component of an application which combined with other components make up the entire deployment ● PaaS services are typically consumed by application deployment staff whose responsibility is to take a completed agency application and cause it to run on the designated complete or partial platform service ● The principal customer interaction with a PaaS service is deployment, equivalent to deploying an application or portion of an application on a software platform service. ● A limited range of configuration options for the platform service may be available. Examples of complete PaaS services include: ● A Linux/Apache/MySQL/PHP (LAMP) platform ready to deploy a customer PHP application, ● a Windows .Net platform ready to deploy a .Net application, ● A custom complete platform ready to develop and deploy a customer application in a proprietary language ● A multiple capability platform ready to deploy an arbitrary customer application on a range of underlying software services. The essential characteristic of a complete PaaS is defined by the customer's ability to deploy a complete custom application directly on the platform. PaaS includes partial services as well as complete platform services. Illustrative examples of individual platform enablers or components include: ● A database service ready to deploy a customer's tables, views and procedures, ● A queuing service ready to deploy a customer's message definitions ● A security service ready to deploy a customer's constraints and target applications for continuous monitoring The essential characteristic of an individual PaaS component is the customer's ability to deploy their unique structures and/or data onto the component for a partial platform function. Note that both the partial and complete PaaS examples all have two things in common: ● They are software services, which offer significant core functionality out of the box ● They must be configured with customer data and structures to deliver results As noted in IaaS, operating systems represent a gray area in that OS is definitely a platform service, but is typically bundled with IaaS infrastructure. If your service provides an OS but allows for interaction with infrastructure, please sub-categorize it as IaaS. If your service "hides" underlying infrastructure, consider it as PaaS.

Software as a Service (SaaS)	Select a SaaS model for service based equivalents of software applications. ● SaaS services are typically consumed by business or subject-matter staff who would interact directly with the application in a non-cloud setting ● The principal customer interaction with a SaaS service is actual operation and consumption of the application services the SaaS service provides. Some minor configuration may be available, but the scope of the configuration is limited to the scope and then the permissions of the configuring user. For example an agency manager might be able to configure some aspects of the application for their agency but not all agencies. An agency user might be able to configure some aspects for themselves but not everyone in their agency. Typically only the Contractor would be permitted to configure aspects of the software for all users. Examples of SaaS services include email systems, business systems of all sorts such as travel systems, inventory systems, etc., wiki's, websites or content management systems, management applications that allow a customer to manage other cloud or non-cloud services, and in general any system where customers interact directly for a business purpose. Gray areas include services that customers use to configure other cloud services, such as cloud management software, cloud brokers, etc. In general these sorts of systems should be considered SaaS, per guidance in this document.

2) Deployment Model

Deployment models (e.g. private, public, community, or hybrid) are not restricted at the SIN level and any specifications for a deployment model are the responsibility of the Ordering Activity.

Multiple deployment model selection is permitted, but at least one model must be selected. The guidance in Table 4 offers examples of how services might be properly mapped to NIST deployment models and how the Contractor should interpret the deployment
model characteristics. Contractors should take care to select the range of NIST deploym ent models most closely corresponding to each service offered.

Note that the scope of this SIN does not include hardware or software components used to construct a cloud, only cloud capabilities delivered as a service, as noted in the Scope section.

Table 5: Guidance for Selecting a Deployment Model

Deployment Model	Guidance
Private Cloud	The service is provided exclusively for the benefit of a definable organization and its components; access from outside the organization is prohibited. The actual services may be provided by third parties, and may be physically located as required, but access is strictly defined by membership in the owning organization.
Public Cloud	The service is provided for general public use and can be accessed by any entity or organization willing to contract for it.
Community Cloud	The service is provided for the exclusive use of a community with a definable shared boundary such as a mission or interest. As with private cloud, the service may be in any suitable location and administered by a community member or a third party.
Hybrid Cloud	The service is composed of one or more of the other models. Typically hybrid models include some aspect of transition between the models that make them up, for example a private and public cloud might be designed as a hybrid cloud where events like increased load permit certain specified services in the private cloud to run in a public cloud for extra capacity, e.g. bursting.

Special Item No. 532420L: Leasing of new electronic equipment

Leasing of new electronic equipment. Includes the following lease types:
Lease to Ownership, and Lease with Option to Own

NOTE: Subject to Cooperative Purchasing

FSC/PSC Class W070 LEASE OR RENTAL OF EQUIPMENT- ADP
EQUIPMENT/SOFTWARE/SUPPLIERS/SUPPORT EQUIPMENT
Lease of Products

INFORMATION TECHNOLOGY CATEGORY HARDWARE SUBCATEGORY

SIN 532420L Option 1 Lease Terms and Conditions

Option 1 Lease Terms and Conditions does not contain a cancellation clause and all leases automatically expire on September 3 0th or sooner.

52.207-5	Option to Purchase Equipment	Feb 1995
52.227-14	Rights in Data-General	May 2014

1. STATEMENT

    a. It is understood by all parties to this contract that orders issued under this SIN shall constitute a lease arrangement. Un less the ordering activity intends to obligate other than annual appropriations to fund the lease, the base period o f the lease is from the date of the product acceptance through September 30 of the fiscal year in which the order is placed.

    b. Agencies are advised to follow the guidance provided in Federal Acquisition Regulation (FAR) Subpart 7.4 Product Lease or Purchase and OMB Circular A-11. Agencies are responsible for the obligation of funding consistent with all applicable legal principles when entering into any lease arrangement.

2. FUNDING AND PERIODS OF LEASING ARRANGEMENTS

    a. Annual Funding. When annually appropriated funds are cited on an order for leasing, the following applies:

        i. The base period of an order for any lease executed by the ordering activity shall be for the duration of the fiscal year. All ordering activity renewal options under the lease shall be specified in the delivery order. All orders for leasing shall remain in effect through September 30 of the fiscal year or the planned expiration date of the lease, whichever is earlier, unless t he ordering activity exercises its rights hereunder to acquire title to the product prior to the planned expiration date or unless the ordering activity exercises its right to terminate under GSAR 552.212 -4. Orders under the lease shall not be deemed to obligate succeeding fiscal year's funds or to otherwise commit the ordering activity to a renewal.

        ii. All orders for leasing shall automatically terminate on September 30, unless the ordering activity notifies the Contractor in writing thirty (30) calendar days prior to the expiration of such orders of the ordering activity's intent to renew. Such notice to renew shall not bind

the ordering activity. The ordering activity has the option to renew each year at the original rate in effect at the time the order is placed. This rate applies for the duration o f the order. If the ordering activity exercises its option to renew, the renewal order shall be issued within 15 days after funds become available for obligation by the ordering activity, or as specified in the initial order. No termination fees shall apply if the ordering activity does not exercise an option.

    a. Crossing Fiscal Years Within Contract Period. Where an ordering activity has specific authority to cross fiscal years with annual appropriations, the ordering activity may place an order under this option to lease product for a period up to the expiration of its period of appropriation availability, or twelve months, whichever occurs later, notwithstanding the intervening fiscal years.

3.   DISCONTINUANCE AND TERMINATION

Notwithstanding any other provision relating to this SIN, the ordering activity may terminate products leased under this agreement, at any time during a fiscal year in accordance with the termination provisions contained in GSAR 552.212 -4(l) Termination for the ordering activity's convenience, or (m) Termination for cause. Additionally, no termination for cost or fees shall be charged for non-renewal of an option.

4.   The following terms and conditions may be included.

    a. ASSIGNMENT OF CLAIMS

        GSAR 552.232-23, Assignment of Claims, is incorporated herein by reference as part of these lease provisions. The ordering activity's contracting officer will acknowledge the assignment of claim for a lease in accordance with FAR 32.8. The extent of the assignee's protection is in accordance with FAR 32.804. Any setoff provision must be in accordance with FAR 32.803.

    b. PEACEFUL POSSESSION AND UNRESTRICTED USE

        In recognition of the types of products available for lease and the potential adverse impact to the ordering activity's
mission, the ordering activity's quiet and peaceful possession and unrestricted use of the product shall not be disturbed in the event the product is sold by the Contractor, or in the event of bankruptcy of the Contractor, corporate dissolution of the Contractor, or other event. The product shall remain in the possession of the ordering activity until the expiration of the lease. Any assignment, sale, bankruptcy, or other transfer of the leased product by the Contractor will not relieve the Contractor of its obligations to the ordering activity and will not change the ordering activity's duties or increase the burdens or risks imposed on the ordering activity.

    c. COMMENCEMENT OF LEASE

        The date on which the ordering activity accepts the products is the Commencement Date of the lease. Acceptance is as defined elsewhere in the contract, or as further specified in the order.

    d. INSTALLATION AND MAINTENANCE

        i. Installation and Maintenance, when applicable, normally are not included in the charge for leasing. The Contractor may require the ordering activity to obtain installation and maintenance services from a qualified source. The ordering activity may obtain installation and/or maintenance on the open market, from the Contractor's schedule contract, or from other sources. The ordering activity may also perform installation and/or maintenance in house, if qualified resources exist. In any event, it is the responsibility of the ordering

activity to ensure that maintenance is in effect for the Lease term for a ll products leased.

    ii.   When installation and/or maintenance are ordered under this schedule to be performed by the Contractor, the payments, terms and conditions as stated in this contract apply. The rates and terms and conditions in effect at the time the order is issued shall apply during any subsequent renewal period of the lease. The maintenance rates and terms and conditions may be added to the lease payments with mutual agreement of the parties.

  e. MONTHLY PAYMENTS:

    i.   Prior to the placement of an order under this Special Item Number, the ordering activity and the Contractor must agree on a "base value" for the products to be leased. For Lease to Ownership (Capital Lease) the base value will be the contract purchase price (less any discounts). For Lease with Option to Own (Operating Lease), the base value will be the contract purchase price (less any discounts), less a mutually agreed upon residual value (pre-stated purchase option price at the conclusion of the lease) for the products. The residual value will be used in the calculation of the original lease payment, lease extension payments, and the purchase option price.

    ii.   To determine the initial lease term payment, the Contractor agrees to apply the negotiated lease factor to the agreed upon base value:

        For Example: Lease factor one (1) percent over the rate for the three-year (or other term) Treasury Bill (T-bill) at the most current U. S. Treasury auction.
The lease payment may be calculated by using a programmed business calculator or by using "rate" functions provided in commercial computer spreadsheets.

    iii.   For any lease extension, the extension lease payment will be ba sed on the original residual value, in lieu of the purchase price. The ordering activity and the Contractor shall agree on a new residual value based on the estimated fair market price at the end of the extension. The formula to determine the lease payment will be that in 5.b. Above.

    iv.   The purchase option price will be the fair market value of the product or payment will be based upon the unamortized principle, as shown on the payment schedule as of the last payment prior to the date of transfer of ownership, whichever is less.

    v.   The point in time when monthly rates are established is subject to negotiation and evaluation at the order level.

    vi.   In the event the ordering activity desires, at any time, to acquire title to product leased hereunder, the ordering activity may make a one-time lump sum payment.

  f. LEASE END/DISCONTINUANCE OPTIONS

    i.   Upon the expiration of the Lease Term, Termination for Convenience, or Termination for Non - Appropriation, the ordering activity will return the Product to the Contractor unless the ordering activity by 30 days written notice elects either:

        1.   to purchase the product for the residual value of the product, or

        2.   to extend the term of the Lease, as mutually agreed. To compute the lease payment, the residual value from the preceding lease shall be the initial value of the leased product. A new residual value shall be negotiated for the extended lease and new

lease payments shall be computed.

ii. Relocation - The ordering activity may relocate products to another location within the ordering activity with prior written notice. No other transfer, including sublease, is permitted. ordering activity shall not assign, transfer or otherwise dispose of any products, or any interest therein, or crate or suffer any levy, lien or encumbrance then except those created for the benefit of Contractor or its assigns.

iii. Returns

1. Within fourteen (14) days after the date of expiration, non-renewal or termination of a lease, the ordering activity shall, at its own risk and expense, have the products packed for shipment in accordance with manufacturer's specifications and return the products to Contractor at the location specified by Contractor in the continental US, in the same condition as when delivered, ordinary wear and tear excepted. Any expenses necessary to return the products to good working order shall be at ordering activity's expense.

2. The Contractor shall conduct a timely inspection of the returned products and within 45 days of the return, assert a claim if the condition of the product exceeds normal wear and tear.

3. Product will be returned in accordance with the terms of the contract and in accordance with Contractor instruction.

4. With respect to software, the ordering activity shall state in writing to the Contractor that it has:
   i. deleted or disabled all files and copies of the software from the equipment on which it was installed;
   ii. returned all software documentation, training manuals, and physical media on which the software was delivered; and
   iii. has no ability to use the returned software.

g. UPGRADES AND ADDITIONS
   i. The ordering activity may affix or install any accessory, addition, upgrade, product or device on the product ("additions") provided that such additions:

   1. can be removed without causing material damage to the product;
   2. do not reduce the value of the product; and
   3. are obtained from or approved by the Contractor and are not subject to the interest of any third party other than the Contractor.

   ii. Any other additions may not be installed without the Contractor's prior written consent. At the end of the lease term, the ordering activity shall remove any additions which:
   1. were not leased from the Contractor, and
   2. are readily removable without causing material damage or impairment of the intended function, use, or value of the product, and restore the product to its original configuration.

   iii. Any additions that are not so removable will become the Contractor's property (lien free).

iv.   Leases of additions and upgrades must be co-terminus with that of the product.

h. RISK OF LOSS OR DAMAGE

The ordering activity is relieved from all risk of loss or damage to the product during periods of transportation, installation, and during the entire time the product is in possession of the ordering activity, except when loss or damage is due to the fault or negligence of the ordering activity. The ordering activity shall assume risk of loss or damage to the product during relocation, (i.e., moving the product from one ordering activity location to another ordering activity location), unless the Contractor shall undertake such relocation.

i. TITLE

During the lease term, product shall always remain the property of the Contractor. The ordering activity shall have no property right or interest in the product except as provided in this leasing agreement and shall hold the product subject and subordinate to the rights of the Contractor. Software and software licenses shall be deemed personal property. The ordering activity shall have no right or interest in the software and related documentation except as provided in the license and the lease. Upon the Commencement Date of the Lease Term, the ordering activity shall have an encumbered license to use the software for the Lease Term. The ordering activity's encumbered license rights in the software will be subject to the same rights as provided to a purchaser of a license under the terms of this contract except that the ordering activity will not have an unencumbered, paid-up license until it has made all lease payments for the full Lease Term in the case of a Lease To Ownership or has otherwise paid the applicable purchase option price.

j. TAXES

The lease payments, purchase option prices, and interest rates identified herein exclude all state and local taxes levied on or measured by the contract or sales price of the product furnished hereunder. The ordering activity will be invoiced for any such taxes as Contractor receives such tax notices or assessments from the applicable local taxing authority. Pursuant to the provisions of FAR 52.229-1 State and Local Taxes, the ordering activity agrees to pay tax or provide evidence necessary to support an exemption from the tax.

k. ADDITIONAL LEASE TERMS

Offeror may propose additional lease terms and conditions for billings, payments, and/or invoices, as long as they are consistent with the terms and conditions specified elsewhere.

INFORMATION TECHNOLOGY CATEGORY HARDWARE SUBCATEGORY

SIN 532420L Option 2 Lease Terms and Conditions

Option 2 Lease Terms and Conditions contains a cancellation clause, in which the fee must be in accordance with applicable legal principles.

To the extent an Offeror wishes to propose alternative lease terms and conditions that provide for lower discounts/prices based on the ordering activity's stated intent to fulfill the projected term of a lease including option years, while at the same time including separate charges for early end of the lease, the following terms apply. These terms address the timing and extent of the ordering activity's financial obligation including any potential charges for early end of the lease.

52.207-5	Option to Purchase Equipment	Feb 1995

52.227-14	Rights in Data-General	May 2014

1. LEASING PRICE LIST NOTICE
   a. Contractors must include the following notice in their contract price list for SIN 532420L:

   "The ordering activity is responsible for the obligation of funds consistent with applicable law. Agencies are advised to review the lease terms and conditions contained in this price list prior to ordering and obligating funding for a lease."

2. STATEMENT OF ORDERING ACTIVITY INTENT
   a. The ordering activity and the Contractor understand that a delivery order issued pursuant to this SIN is a lease arrangement and contemplates the use of the product for the term of the lease specified in such delivery order (the "Lease Term"). In that regard, the ordering Activity, as lessee, understands that the lease provisions contained herein and the rate established for the delivery order are premised on the ordering Activity's intent to fulfill that agreement, including acquiring products for the period of time specified in the order. Each lease hereunder shall be initiated by a delivery order which shall, either through a statement of work or other attachment, specify the product being leased, and the required terms of the transaction.

   b. Each ordering activity placing a delivery order under the terms of this option intends to exercise each renewal option and to extend the lease until completion of the Lease Term so long as the need of the ordering activity for the product or functionally similar product continues to exist and funds are appropriated. Contractor may request information from the ordering activity concerning the essential use of the products.

3. LEASE TERM
   a. The date on which the ordering activity accepts the products is the Commencement Date of the lease. For acceptance to occur, the products must operate in accordance with the product's published specifications and statement of work.

   Acceptance shall be in accordance with the terms of the contract or as otherwise negotiated by the ordering activity and the Contractor.

   b. Any lease is executed by the ordering activity on the basis that the known requirement for such product exceeds the initial base period of the delivery order, which is typically 12 months, or for the remainder of the fiscal year. Pursuant to FAR and/or DFAR 232.703-3(b), delivery orders with options to renew that are funded by annual (fiscal year) appropriations may provide for initial base periods and option periods that cross fiscal years as long as the initial base period or each option period does not exceed a 12 month period. This cross fiscal year authority does not apply to multi-year leases.

   c. The total Lease Term will be specified in each delivery order, including any relevant renewal options of the ordering activity. All delivery orders, whether for the initial base period or renewal period, shall remain in effect through September 30 of the fiscal year (unless extended by statute), through any earlier expiration date specified in the delivery order, or until the ordering activity exercises its rights hereunder to acquire title to the product prior to such expiration date. The ordering activity, at its discretion, may exercise each option to extend the term of the lease through the lease term. Renewal delivery orders shall not be issued for less

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than all of the product and/or software set forth in the original delivery order. Delivery orders under this SIN shall not be deemed to obligate succeeding fiscal year funds. The ordering activity shall provide the Contractor with written notice of exercise of each renewal option as soon as practicable. Notice requirements may be negotiated on an order-by-order basis.

d. Where an ordering activity's specific appropriation or procurement authority provides for contracting beyond the fiscal year period, the ordering activity may place a delivery order for a period up to the expiration of the Lease Term, or to the expiration of the period of availability of the multi-year appropriation, or whatever is appropriate under the applicable circumstances.

4. LEASE TERMINATION

   a. The ordering activity must elect the Lease Term of the relevant delivery order. The Contractor (and assignee, if any) will rely on the ordering activity's representation of its intent to fulfill the full Lease Term to determine the monthly lease.
   payments calculated herein.

      i. The ordering activity may terminate or not renew leases under this option at no cost, pursuant to a Termination for Non-Appropriation as defined herein (see paragraph (c) below). In any other event, the ordering activity's contracting officer may either terminate the relevant delivery order for cause or Termination for Convenience in accordance with GSAR 552.212-4 paragraphs (l) and (m).

      ii. The Termination for Convenience at the end of a fiscal year allows for separate charges for the early end of the lease (see paragraph (d) below). In the event of termination for the convenience of the ordering activity, the ordering activity may be liable only up to the amount beyond the order's Termination Ceiling. Any termination charges calculated under the Termination for Convenience clause must be determined or identified in the delivery order or in the lease agreement.

   b. Termination for Convenience of the Ordering Activity: Leases entered into under this option may not be terminated except by the ordering activity's contracting office responsible for the delivery order in accordance with GSAR 552.212-4, Contract Terms and Conditions Commercial Items, paragraph (l) Termination for Convenience of the ordering activity. The costs charged to the ordering activity as the result of any Termination for Convenience of the ordering activity must be reasonable and may not exceed the sum of the fiscal year's payment obligations less payments made to date of termination plus the Termination Ceiling.

   c. Termination for Non-Appropriation: The ordering activity reasonably believes that the bona fide need will exist for the entire Lease Term and corresponding funds in an amount sufficient to make all payments for the lease Term will be available to the ordering activity. Therefore, it is unlikely that leases entered into under this option will terminate prior to the full Lease Term. Nevertheless, the ordering activity's contracting officer may terminate or not renew leases at the end of any initial base period or option period under this paragraph if (a) it no longer has a bona fide need for the product or functionally similar product; or (b) there is a continuing need, but adequate funds have not been made available to the ordering activity in an amount sufficient to continue to make the lease payments. If this occurs, the ordering activity will promptly notify the Contractor, and the product lease will be terminated at the end of the last fiscal year for which funds were appropriated. Substantiation to support a termination for non-appropriation shall be provided to the Contractor upon request.

d. Termination Charges: At the initiation of the lease, termination ceilings will be established for each year of the lease term. The termination ceiling is a limit on the amount that a Contractor may be paid by the ordering activity on the Termination for Convenience of a lease. No claim will be accepted for future costs: supplies, maintenance, usage charges or interest expense beyond the date of termination. In accordance with the bona fide needs rule, all termination charges must

reasonably represent the value the ordering activity received for the work performed based upon the shorter lease term. No Termination for Convenience costs will be associated with the expiration of the lease term.

e. At the order level, the ordering activity may, consistent with legal principles, negotiate lower monthly payments or rates based upon appropriate changes to the termination conditions in this section.

4. The following terms and conditions may be included.

a. ASSIGNMENT OF CLAIMS

GSAR 552.232-23, Assignment of Claims, is incorporated herein by reference as part of these lease provisions. The ordering activity's contracting officer will acknowledge the assignment of claim for a lease in accordance with FAR 32.8. The extent of the assignee's protection is in accordance with FAR 32.804. Any setoff provision must be in accordance with FAR 32.803.

b. PEACEFUL POSSESSION AND UNRESTRICTED USE

In recognition of the types of products available for lease and the potential adverse impact to the ordering activity's

mission, the ordering activity's quiet and peaceful possession and unrestricted use of the product shall not be disturbed in the event the product is sold by the Contractor, or in the event of bankruptcy of the Contractor, corporate dissolution of th e Contractor, or other event. The product shall remain in the possession of the ordering activity until the expiration of the lease. Any assignment, sale, bankruptcy, or other transfer of the leased product by the Contractor will not relieve the Contractor of its obligations to the ordering activity and will not change the ordering activity's duties or increase the burdens or risks imposed on the ordering activity.

c. COMMENCEMENT OF LEASE

The date on which the ordering activity accepts the products is the Commencement Date of the lease. Acceptance is as defined elsewhere in the contract, or as further specified in the order.

d. INSTALLATION AND MAINTENANCE

i. Installation and Maintenance, when applicable, normally are not included in the charge for leasing. The Contractor may require the ordering activity to obtain installation and maintenance services from a qualified source. The ordering activity may obtain installation and/or maintenance on the open market, from the Contractor's schedule contract, or from other sources. The ordering activity may also perform installation and/or maintenance in house, if qualified resources exist. In any event, it is the responsibility of the ordering activity to ensure that maintenance is in effect for the Lease term for all products leased.

ii. When installation and/or maintenance are ordered under this schedule to be performed by the Contractor, the payments, terms and conditions as stated in this contract apply. The rates and terms and conditions in effect at the time the order is issued shall apply during any subsequent renewal period of the lease. The maintenance rates and terms and conditions may be added to the lease payments with mutual agreement of the parties.

e. MONTHLY PAYMENTS:

i. Prior to the placement of an order under this Special Item Number, the ordering activity and the Contractor must agree on a "base value" for the products to be leased. For Lease to Ownership (Capital Lease) the base value will be the contract purchase price (less any discounts). For Lease with Option to Own (Opera ting Lease), the base value will be the contract purchase price (less any discounts), less a mutually agreed upon residual value (pre-stated purchase option price at the conclusion of the lease) for the products. The residual value will be used in the calculation of the original lease payment, lease extension payments, and the purchase option price.

ii. To determine the initial lease term payment, the Contractor agrees to apply the negotiated lease factor to the agreed upon base value:

For Example: Lease factor one (1) percent over the rate for the three- y ear (or other term) Treasury Bill (T-bill) at the most current U. S. Treasury auction.
The lease payment may be calculated by using a programmed business calculator or by using "rate" functions provided in commercial computer spreadsheets.

iii. For any lease extension, the extension lease payment will be based on the original residual value, in lieu of the purchase price. The ordering activity and the Contractor shall agree on a new residual value based on the estimated fair market price at the end of the extension. The formula to determine the lease payment will be that in 5.b. Above.

iv. The purchase option price will be the fair market value of the product or payment will be based upon the unamortized principle, as shown on the payment schedule as of the last payment prior to the date of transfer of ownership, whichever is less.

v. The point in time when monthly rates are established is subject to negotiation and evaluation at the order level.

vi. In the event the ordering activity desires, at any time, to acquire title to product leased hereunder, the ordering activity may make a one-time lump sum payment.

f. LEASE END/DISCONTINUANCE OPTIONS

i. Upon the expiration of the Lease Term, Termination for Convenience, or Termination for Non - Appropriation, the ordering activity will return the Product to the Contractor unless the ordering activity by 30 days written notice elects either:
   1. to purchase the product for the residual value of the product, or
   2. to extend the term of the Lease, as mutually agreed. To compute the lease payment, the residual value from the preceding lease shall be the initial value of the leased product. A new residual value shall be negotiated for the extended lease and new lease payments shall be computed.

ii.   Relocation - The ordering activity may relocate products to another location within the ordering activity with prior written notice. No other transfer, including sublease, is permitted. ordering activity shall not assign, transfer or otherwise dispose of any products, or any interest therein, or crate or suffer any levy, lien or encumbrance then except those created for the benefit of Contractor or its assigns.

iii.   Returns

1.   Within fourteen (14) days after the date of expiration, non-renewal or termination of a lease, the ordering activity shall, at its own risk and expense, have the products packed for shipment in accordance with manufacturer's specifications and return the products to Contractor at the location specified by Contractor in the continental US, in the same condition as when delivered, ordinary wear and tear excepted. Any expenses necessary to return the products to good working order shall be at ordering activity's expense.

2.   The Contractor shall conduct a timely inspection of the returned products and within 45 days of the return, assert a claim if the condition of the product exceeds normal wear and tear.

3.   Product will be returned in accordance with the terms of the contract and in accordance with Contractor instruction.

4.   With respect to software, the ordering activity shall state in writing to the Contractor that it has:
   i.   deleted or disabled all files and copies of the software from the equipment on which it was installed;
   ii.   returned all software documentation, training manuals, and physical media on which the software was delivered; and
   iii.   has no ability to use the returned software.

g.   UPGRADES AND ADDITIONS
   i.   The ordering activity may affix or install any accessory, addition, upgrade, product or device on the product ("additions") provided that such additions:

   1.   can be removed without causing material damage to the product;
   2.   do not reduce the value of the product; and
   3.   are obtained from or approved by the Contractor, and are not subject to the interest of any third party other than the Contractor.

   ii.   Any other additions may not be installed without the Contractor's prior written consent. At the end of the lease term, the ordering activity shall remove any additions which:
   1.   were not leased from the Contractor, and
   2.   are readily removable without causing material damage or impairment of the intended function, use, or value of the product, and restore the product to its original configuration.

   iii.   Any additions that are not so removable will become the Contractor's property (lien free).

   iv.   Leases of additions and upgrades must be co-terminus with that of the product.

h. RISK OF LOSS OR DAMAGE

The ordering activity is relieved from all risk of loss or damage to the product during periods of transportation, installation, and during the entire time the product is in possession of the ordering activity, except when loss or damage is due to the fault or negligence of the ordering activity. The ordering activity shall assume risk of lo ss or damage to the product during relocation, (i.e., moving the product from one ordering activity location to another ordering activity location), unless the Contractor shall undertake such relocation.

i. TITLE

During the lease term, product shall always remain the property of the Contractor. The ordering activity shall have no property right or interest in the product except as provided in this leasing agreement and shall hold the product subject and subordinate to the rights of the Contractor. Software and software licenses shall be deemed personal property. The ordering activity shall have no right or interest in the software and related documentation except as provided in the license and the lease. Upon the Commencement Date of the Lease Term, the ordering activity shall have an encumbered license to use the software for the Lease Term. The ordering activity's encumbered license rights in the software will be subject to the same rights as provided to a purchaser of a license under the terms of this contract except that the ordering activity will not have an unencumbered, paid -up license until it has made all lease payments for the full Lease Term in the case of a Lease To Ownership or has otherwise paid the applicable purchase option price.

j. TAXES

The lease payments, purchase option prices, and interest rates identified herein exclude all state and local taxes levied on or measured by the contract or sales price of the product furnished hereunder. The ordering activity will be invoiced for any such taxes as Contractor receives such tax notices or assessments from t h e applicable local taxing authority. Pursuant to the provisions of FAR 52.229-1 State and Local Taxes, the ordering activity agrees to pay tax or provide evidence necessary to support an ex-emption from the tax.

k. ADDITIONAL LEASE TERMS

Offeror may propose additional lease terms and conditions for billings, payments, and/or invoices, as long as they are consistent with the terms and conditions specified elsewhere.

Special Item No. 541370GEO: Earth Observation Solutions

Provides geospatial earth observation technologies, products, and services to include, but not limited to ground, satellite and aerial based sensor data and imagery; worldwide digital transmission, internet, data, and video services and products through various networks, platforms, and applications. Offerings include global coverage, imagery, archive storage and distribution, monitoring, basemaps (mosaics), and earth observation solutions for accurate, mission critica l information for uses to include, but not limited to, environmental, agriculture, meteorology, forestry, fish & wildlife habitats, disaster response and recovery, defense, maritime, mapping, humanitarian support, transportation, and public safety.

NOTE: Subject to Cooperative Purchasing

FSC/PSC Class D304 IT AND TELECOM-
TELECOMMUNICATIONS AND TRANSMISSION
IT AND TELECOM-TELECOMMUNICATIONS AND TRANSMISSION

FSC/PSC Class D305 IT AND TELECOM- TELEPROCESSING,

TIMESHARE, AND CLOUD COMPUTING
- IT AND TELECOM- TELEPROCESSING, TIMESHARE, AND CLOUD COMPUTING

FSC/PSC Class D317 IT AND TELECOM- WEB-BASED SUBSCRIPTION
- Creation/Retrieval of IT Related Data Services
- Creation/Retrieval of Other Information Services
- Web-Based Subscription

FSC/PSC Class D399 IT AND TELECOM- OTHER IT AND TELECOMMUNICATIONS
- Other IT and Telecommunications Services

Special Item No. 54151: Software Maintenance Services

Software maintenance services creates, designs, implements, and/or integrates customized changes to software that solve one or more problems and is not included with the price of the software. Software maintenance services includes person-to-person communications regardless of the medium used to communicate: telephone support, online technical support, customized support, and/or technical expertise which are charged commercially.

NOTE: Subject to Cooperative Purchasing

Special Item No. 54151ECOM: Electronic Commerce and Subscription Services

Includes value added network services, e-mail services, Internet access services, electronic subscription services, data transmission services, and emerging electronic commerce technologies.

NOTE: Subject to Cooperative Purchasing

Special Item No. 54151S: Information Technology Professional Services

IT Professional Services and/or labor categories for database planning and design; systems analysis, integration, and design; programming, conversion and implementation support; network services, data/records management, and testing.

NOTE: Subject to Cooperative Purchasing

Commercial Job Title: Consulting Engineer

Minimum/General Experience: Has approximately 5 years of experience. Possesses understanding covering the planning, research, development, design, testing, evaluation, production, analysis, and implementation of information systems, programs and equipment. Provides technical assistance to others working on requirements, definition, system requirements analysis, system level design and integration, operations support planning and/or the coordination of the preparation of system development specifications and specialty engineering plans. May be skilled in systems engineering, electrical engineering or industrial engineering activities.

Functional Responsibility: Working under close supervision, person provides technical or scientific and project support for multiple large-scale projects that cross-cut multiple specialization and product development areas. Applies advanced business and/or technical expertise to assist others with defining, analyzing, validating and documenting complex customer operating environments, states of technology and current engineering processes. Provides advanced technical support to others

involved in applying specialized knowledge to complex customer processes and requirements. Supports complex technical investigations through advanced research techniques, analysis or development phases of engineering projects. Works with other engineering disciplines in the development and application of processes to improve quality, reliability, cost customer appeal, and satisfaction.

Minimum Education: B.A. or B.S. in Computer Science, Engineering, Mathematics, Economics or Business.

Commercial Job Title: Information Architect

Minimum/General Experience: Has approximately 2 years of experience with skills covering the planning, research, development, design, testing, evaluation, production, analysis, and implementation of multi-tier network configurations for web enabled applications. Possesses a clear understanding of the interrelationships of firewalls, network devices, and servers and clear knowledge of a specific web enabling technology (i.e. Microsoft or Netscape servers). Possesses experience with database and/or email integration, Internet network design (DMZ, routers, switching) and system administration practices.

Functional Responsibility: Designs Intranet/Internet/Extranet architectures and develops implementations plans; administration activity; i.e., hardware, security, firewalls. Implements security architecture using LDAP, SSL and firewalls. Installs, configures and maintains all Intranet/Internet/Extranet tools, databases and features; provides support to e-commerce and other systems. Implements server design, development, and operation as well as analyze and develop requirements for hardware sizing/capacity, data validation, security and integration points to other applications.

Minimum Education: B.S. in Engineering, Mathematics, Computer Science, Operations Research, or applied science.

Commercial Job Title: Project Manager

Minimum/General Experience: Has approximately 2 years of experience within information system project-oriented environments. Leads planning, scheduling, monitoring, and reporting activities for projects. Facilitates needs assessment and development of recommended project control solutions to be used for planning, scheduling and tracking of each project though integration of various project management tools. Develops project controls and reporting procedures. Assists in the training of the project team on application of the procedures. Analyzes project progress/costs and assists with development and evaluation of alternatives when the project falls behind schedule or exceeds budget. Develops and delivers presentations to customer management. Integrates specific industry methodologies to appropriate project management solutions.

Functional Responsibility: Possesses a thorough understanding of the process requirements and provide b o t h technical and management oversight of the project. Responsible for customer satisfaction, serves as the single point of contact, compliance with the Statement of Work, project planning and management, resource allocation, and reporting.

Minimum Education: B.S. in Engineering, Mathematics, Computer Science, Operations Research, or applied science.

Commercial Job Title: Senior Consulting Engineer

Minimum/General Experience: Has approximately 10 years of experience. Possesses understanding covering the planning, research, development, design, testing, evaluation, production, analysis, and implementation of information systems, programs and equipment. Provides technical assistance to others working on requirements, definition, system requirements analysis, system level design and integration, operations support planning and/or the coordination of the preparation of system development specifications and specialty engineering plans. May be skilled in systems engineering, electrical engineering or industrial engineering activities.

Functional Responsibility: Provides supervision, person provides technical or scientific and project support for multiple large- scale projects that cross-cut multiple specialization and product development areas. Applies advanced business and/or technical expertise to assist others with defining, analyzing, validating and documenting. complex customer operating environments, states of technology and current engineering processes. Provides advanced technical support to others involved in applying specialized knowledge to complex customer processes and requirements. Supports complex technical investigations through advanced research techniques, analysis or development phases of engineering projects. Works with other engineering disciplines in the development and application of processes to improve quality, reliability, cost customer appeal, and satisfaction.

Minimum Education: B.S. in Engineering, Mathematics, Computer Science, Operations Research, or applied science.

Commercial Job Title: Senior Consulting Engineer

Minimum/General Experience: Has approximately 10 years of experience. Possesses understanding covering the planning, research, development, design, testing, evaluation, production, analysis, and implementation of information systems, programs and equipment. Provides technical assistance to others working on requirements, definition, system requirements analysis, system level design and integration, operations support planning and/or the coordination of the preparation of system development specifications and specialty engineering plans. May be skilled in systems engineering, electrical engineering or industrial engineering activities.

Functional Responsibility: Provides supervision, person provides technical or scientific and project support for multiple large- scale projects that cross-cut multiple specialization and product development areas. Applies advanced business and/or technical expertise to assist others with defining, analyzing, validating and documenting. complex customer operating environments, states of technology and current engineering processes. Provides advanced technical support to others involved in applying specialized knowledge to complex customer processes and requirements. Supports complex technical investigations through advanced research techniques, analysis or development phases of engineering projects. Works with other engineering disciplines in the development and application of processes to improve quality, reliability, cost customer appeal, and satisfaction.

Minimum Education: B.S. in Engineering, Mathematics, Computer Science, Operations Research, or applied science.

Commercial Job Title: Senior Information Architect

Minimum/General Experience: Has approximately 7 years of experience with skills covering the planning, research, development, design, testing, evaluation, production, analysis, and implementation of multi-tier network configurations for web enabled applications. Possesses a clear understanding of the interrelationships of firewalls, network devices, and servers and clear knowledge of a specific web enabling technology (i.e. Microsoft or Netscape servers). Possesses experience with database and/or email integration, Internet network design (DMZ, routers, switching) and system administration practices. Functional Responsibility: Provides supervision, person designs Intranet/Internet/Extranet architectures and develops implementations plans; administration activity; i.e., hardware, security, firewalls. Implements security architecture using LDAP, SSL and firewalls. Installs, configures and maintains all Intranet/Internet/Extranet tools, databases and features; provides support to e-commerce and other systems. Implements server design, development, and operation as well as analyze and develop requirements for hardware sizing/capacity, data validation, security and integration points to other applications.

Minimum Education: B.S. in Engineering, Mathematics, Computer Science, Operations Research, or applied science

Commercial Job Title: Senior Project Manager

Minimum/General Experience: Has approximately 7 years' experience within information system project-oriented environments. Leads planning, scheduling, monitoring, and reporting activities for projects. Facilitates needs assessment and development of recommended project control solutions to be used for planning, scheduling and tracking of each project though integration of various project management tools. Develops project controls and reporting procedures. Assists in the training of the project team on application of the procedures. Analyzes project progress/costs and assists with development and evaluation of alternatives when the project falls behind schedule or exceeds budget. Develops and delivers presentations to customer management. Integrates specific industry methodologies to appropriate project management solutions.

Functional Responsibility: Provides supervision, person possesses a thorough understanding of the process requirements and provide both technical and management oversight of the project. Responsible for customer satisfaction, serves as the single point of contact, compliance with the Statement of Work, project planning and management, resource allocation, and reporting.

Minimum Education: B.S. in Engineering, Mathematics, Computer Science, Operations Research, or applied science.

Labor Category	August 2022 August 2023	August 2023 August 2024	August 2024 August 2025	August 2025 August 2026	August 2026 August 2027	August 2027 August 2028
	YEAR 5	YEAR 6	YEAR 7	YEAR 8	YEAR 9	YEAR 10
Consultant Engineer	222.68	229.27	236.06	243.04	250.24	257.64
Information Architect	217.64	224.08	230.71	237.54	244.57	251.82
Project Manager	217.64	224.08	230.71	237.54	244.57	251.82
Senior Consulting Engineer	255.74	263.30	271.10	279.12	287.39	295.89
Senior Information Architect	278.49	286.73	295.21	303.95	312.95	322.21
Senior Project Manager	272.76	280.83	289.14	297.69	306.51	315.58

Special Item No. 561422: Automated Contact Center Solutions (ACCS)

ACCS is defined as any combination of products, equipment, software and/or services that are required to establish and maintain contact center capabilities managed by the contractor for an agency. These include a wide range of automated and attended managed solutions that allow agencies to respond to inquiries from the public. Permissible offerings under this SIN may include any technologies or services required to deliver and support ACCS to agencies, including but not limited to: • Technology: Automated services to include but not limited to Artificial Intelligence (AI), Chat Bots, Robotic Process Automation, Interactive Voice Response (IVR), Voice/Speech Recognition, Text-to-Speech, Voicemail, Callback, Web Callback, Email Delivery, Hosted Online Ordering, Hosted Email Web Form, Hosted FAQ Service, etc.

NOTE: Subject to Cooperative Purchasing

Special Item No. 611420: Information Technology Training

Includes training on hardware, software, cloud, and

other applicable systems. NOTE: Subject to

Cooperative Purchasing

FSC/PSC Class U012 EDUCATION/TRAINING-
INFORMATION TECHNOLOGY/TELECOMMUNICATIONS
TRAINING

Training Courses for Information Technology Equipment and Software

Special Item No. 811212: Maintenance of Equipment, Repair Services and/or Repair/Spare Parts

Maintenance, Repair Service, and Repair Parts/Spare Parts for Government-Owned General Purpose Commercial Information Technology Equipment, Radio/Telephone Equipment

NOTE: Subject to Cooperative Purchasing

FSC/PSC Class J070 - Maintenance and Repair Service)(Repair Parts/Spare Parts - See FSC Class for basic equipment)

FSC/PSC Class J058 – Maintenance and Repair of Communication Equipment

INFORMATION TECHNOLOGY CATEGORY HARDWARE SUBCATEGORY

SIN 811212 Hardware Maintenance Order Terms

1) Service Areas
   a) The maintenance and/or repair service rates per the contract are applicable to any ordering activity locations within a_(**insert miles) mile radius of the Contractor/Original Equipment Manufacturer (OEM) service points.. If any additional charge is to apply because of the greater distance from the Contractor/OEM service locations, the mileage rate or other distance factor shall be negotiated at the Task Order level.

   b) When maintenance and/or repair services cannot be performed at the ordering activity installation site, the repair services will be performed at the Contractor's plant(s) listed below:

Address	

City	State	Zip Code

2) Loss or Damage
When the Contractor moves equipment to its/OEM location for repairs, the Contractor shall be responsible for any damage or loss, from the time the equipment is removed from the ordering activity installation, until the equipment is returned to such installation.

3) Scope
   a) The Contractor shall provide maintenance for all equipment listed herein, as requested by the ordering activity during the contract term. Repair service and repair parts/spare parts shall apply exclusively to the equipment types/models within the scope of the Information Technology Category.

   b) Equipment placed under maintenance service shall be in good operating condition.
      i. In order to determine that the equipment is in good operating condition, the equipment shall be subject to inspection by the Contractor, without charge to the ordering activity.

      ii. Costs of any repairs performed for the purpose of placing the equipment in good operating condition shall be borne by the Contractor, if the equipment was under the Contractor/OEM guarantee/warranty or maintenance responsibility prior to the effective date of the maintenance order.

      iii. If the equipment was not under the Contractor/OEM responsibility, the costs necessary to place the equipment in proper operating condition are to be borne by the ordering activity, in accordance with the provisions of the contract.

4) Responsibilities
   a) For equipment not covered by a maintenance contract or warranty, repair service personnel shall complete repairs as soon as possible after notification by the ordering activity that service is required. Within the service areas, this repair service should normally be done within 4 hours after notification.

b) If the Ordering Activity task or delivery order specifies a factory authorized/certified service personnel then the Contractor is obligated to provide such a factory authorized/certified service personnel for the equipment to be repaired or serviced, unless otherwise agreed to in advance between the Ordering Activity and the Contractor.

5) Maintenance Rate Provisions

a) The Contractor shall bear all costs of maintenance, including labor, parts, and such other expenses as are necessary to keep the equipment in good operating condition, provided that the required repairs are not occasioned by fault or negligence of the ordering activity.

    i.   Regular Hours: The basic monthly rate for each make and model of equipment shall entitle the ordering activity to maintenance service during a mutually agreed upon nine (9) hour principal period of maintenance, Monday through Friday, exclusive of holidays observed at the ordering activity location.

    ii.   After Hours: Should the ordering activity require that maintenance be performed outside of regular hours, charges for such maintenance, if any, will be specified in the GSA Price List (I-FSS-600 CONTRACT PRICE LISTS (OCT 2016). Periods of less than one hour will be prorated to the nearest quarter hour.

    iii.   Travel and Transportation: If any charge is to apply, over and above the regular maintenance rates, due to the distance between the ordering activity location and the Contractor/OEM's service area, the charge will be negotiated at the Task Order level.

	Yes	No
Indicate if there will be an additional charge for travel and transportation.		

a) Quantity Discounts from listed maintenance service rates for multiple equipment owned and/or leased by an ordering activity shall be provided below.

Quantity Range	Discounts
Units	%
Units	%
Units	%

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SIN 811212 Hardware Repair Service Order Terms

1) Service Areas
   a) The maintenance and/or repair service rates per the contract are applicable to any ordering activity locations within a _(**insert miles) mile radius of the Contractor/Original Equipment Manufacturer (OEM) service points.. If any additional charge is to apply because of the greater distance from the Contractor/OEM service locations, the mileage rate or other distance factor shall be negotiated at the Task Order level.

   b) When maintenance and/or repair services cannot be performed at the ordering activity installation site, the repair services will be performed at the Contractor's plant(s) listed below:

Address

City	State	Zip Code

2) Loss or Damage
   When the Contractor moves equipment to its/OEM location for repairs, the Contractor shall be responsible for any damage or loss, from the time the equipment is removed from the ordering activity installation, until the equipment is returned to such installation.

3) Scope
   a) The Contractor shall provide maintenance for all equipment listed herein, as requested by the ordering activity during the contract term. Repair service and repair parts/spare parts shall apply exclusively to the equipment types/models within the scope of the Information Technology Category.

   b) Equipment placed under maintenance and/or service shall be in good operating condition.
      i) In order to determine that the equipment is in good operating condition, the equipment shall be subject to inspection by the Contractor, without charge to the ordering activity.

      ii) Costs of any repairs performed for the purpose of placing the equipment in good operating condition shall be borne by the Contractor, if the equipment was under the Contractor/OEM guarantee/warranty or maintenance responsibility prior to the effective date of the maintenance order.

      iii) If the equipment was not under the Contractor/OEM responsibility, the costs necessary to place the equipment in proper operating condition are to be borne by the ordering activity, in accordance with the provisions of the contract.

4) Responsibilities

    a) For equipment not covered by a maintenance contract or warranty, repair service personnel shall complete repairs as soon as possible after notification by the ordering activity that service is required. Within the service areas, this repair service should normally be done within 4 hours after notification.

    b) If the Ordering Activity task or delivery order specifies a factory authorized/certified service personnel then the Contractor is obligated to provide such a factory authorized/certified service personnel for the equipment to be repaired or serviced, unless otherwise agreed to in advance between the Ordering Activity and the Contractor.

5) Repair Service Rate Provisions

    a) Charges for repair service will include the labor charge, computed at the rates set forth below, for the time during which repairmen are actually engaged in work, and, when applicable, the charge for travel or transportation.

    b) Multiple Machines: When repairs are ordered by the ordering activity on two or more machines located in one or more buildings within walking distance of each other, the charges will be computed from the time the repairman commences work on the first machine, until the work is completed on the last machine. The time required to go from one machine to another, or from one building to another, will be considered actual work performance, and chargeable to the ordering activity, provided the time consumed in going between machines (or buildings) is reasonable.

    c) At the Contractor/OEM's Facility

        i) When equipment is returned to the Contractor/OEM's Facility for adjustments or repairs which are not covered by the guarantee/warranty provision, the cost of transportation, packing, etc. from the ordering activity location to the Contractor's plant, and return to the ordering activity location, shall be borne by the ordering activity.

        ii) The ordering activity should not return defective equipment to the Contractor/OEM for adjustments and repairs or replacement without prior consultation and instruction.

    d) At the Ordering Activity Location (Within Established Service Areas)

        i) When equipment is repaired at the ordering activity location, and repair service rates are established for service areas or zones, the listed rates are applicable to any ordering activity location within such service areas or zones.
No extra charge, time, or expense will be allowed for travel or transportation of repairmen or machines to or from the ordering activity office; such overhead is included in the repair service rates.

    e) At the Ordering Activity Location (Outside Established Service Areas)

        i) If repairs are to be made at the ordering activity location, and the location is outside the service area terms defined in the GSA Price list. Rates negotiated at the task order will apply.

        ii) When the overall travel charge computed at the above mileage rate is unreasonable (considering the time required for travel, actual and necessary transportation costs, and the allowable ordering activity per diem rate for each night the repairman is required

to remain overnight at the ordering activity location), the ordering activity shall have the option of reimbursing the Contractor for actual costs, provided that the actual costs are reasonable and allowable. The Contractor shall furnish the ordering activity with a report of travel performed and related expenses incurred. The report shall include departure and arrival dates, times, and the applicable mode of travel.

    f) Labor Rates

        i) Regular Hours: Contract rates shall entitle the ordering activity to repair service during the period 8:00 a.m. to 5:00 p.m., Monday through Friday, exclusive of holidays observed at the ordering activity location. There shall be no additional charge for repair service, which was requested during regular hours, but performed at the convenience of the Contractor outside the regular hours.

        ii) After Hours: Should the ordering activity require that service be performed outside of regular hours, charges for such service, if any, will be specified in the GSA Price List (I -FSS-600 CONTRACT PRICE LISTS (OCT 2016). Periods of less than one hour will be prorated to the nearest quarter hour.

        iii) Sundays and Holidays: When the ordering activity requires that repair service be performed on Sundays and Holidays observed at the ordering activity location, the Sundays and Holidays repair service rates shall apply, and will be specified in the GSA Price List (I-FSS-600 CONTRACT PRICE LISTS (OCT 2016). Periods of less than one hour will be prorated to the nearest quarter hour.

Repair Service Rates

	Minimum Charge * - Regular Hours	Hourly Rate - After Hours	Hourly Rate - Sunday and Holidays
Contractor/OEM Facility			
Ordering Activity Location (Within Established Service Areas)			
Ordering Activity Location (Outside Established Service Areas)			

*MINIMUM CHARGES INCLUDE FULL __HOURS ON THE JOB

    4) Repair Parts/Spare Parts Rate Provision

        a) All parts, furnished as spares or as repair parts in connection with the repair of equipment, unless otherwise indicated in the GSA Price list shall be new, standard parts manufactured by the OEM.

        b) All parts shall be furnished at the prices indicated in the Contractor's commercial pricelist dated____, at a Discount of ---- % from such listed prices.

Special Item No. 333429: 3D Printing Solutions and Additive Manufacturing Solutions

333249 Includes printers; ancillary equipment, technical services and supplies required to generate functional prototype images and printed objects. Equipment may include all classes and sizes of 3D Printers, laser imaging devices, post processing devices and ancillary accessories and software to produce functional items. Technical services include but are not limited to: 3D Printing and laser imaging to produce a digital file used to generate functional prototype images and printed objects. All types of consumables and other items related to this SIN are included.

Special Item No. 518210ERM: Electronic Records Management

518210ERM Electronic Records Management Solutions provide a comprehensive capability to solve the complex challenges posed by the movement, manipulation, archiving, security, and management of electronic records. The vendor provides professional management and administrative support personnel with the necessary skills to perform effective record management services for both classified and/or unclassified records. The services are provided using either Government or vendor equipment and facilities or a combination of both. The objective of electronic records management services is to permit the access, maintenance, control, storage, disposition, and transfer of electronic records. Includes any ancillary supplies and/or services necessary to provide a total electronic records management solution.

Vendor Certification for SIN 518210ERM -

SIN 51821OERM Vendor Certification for Electronic Records Management Solutions
Version 3.0 (As of MAS Refresh 18)

For the purposes of the MAS Solicitation, eight (8) specific elements of Electronic Records Management (ERM) Services have been identified. These 8 elements are fully defined and the corresponding requirements are identified in NARA's *Universal Electronic Records Management Requirements* spreadsheet attachment to the Solicitation. These requirements have been established and are administered by the National Archives and Records Administration (NARA). Vendors may provide any combination of the 8 elements of ERM solutions; however, vendors must certify that they are capable of meeting all standards associated with the elements they propose by completing this self-certification. *Vendors must include a completed copy of this certification in their published GSA MAS Contract Price List to help illustrate their ERM capabilities to federal customer agencies.*

Proposed Elements of Electronic Records Management Services:
By selecting the below Elements, you are self-certifying you meet NARA's Universal ERM Requirements for that Element. Select all Elements that apply.

X Element 1 - Office Management Applications
X Element 2 - Electronic Messages
X Element 3 - Social Media
☐Element 4 - Websites
X Element 5 - Photographs (Born-Digital and Scanned Images)
X Element 6 - Digital Audio and Video
X Element 7 - Structured Data
X Element 8 - Shared Drives

In the space below you must provide a brief summary description for each of the above Elements that you have checked off. The summary must include which ERM products/ services/ solutions- currently awarded under SIN 518210ERM of your MAS contract- are related to the respective Element. Example questions are provided for each Element to assist with your response. Those questions are based on NARA's Universal Electronic Records Management Requirements and reflect common questions from agencies. *If you cannot provide a summary description for a given Element, or you do not currently offer products/services/solutions under SIN 518210ERM related to that Element, you cannot self-certify that Element on this form.* Please use as much space as you need below, but be concise! Please respond as "Not applicable" for any Element you did not select above.

The specifics of your below responses are not part of the evaluation criteria for adding SIN 518210ERM. The intention of the below section is to assist agencies with market research and

help agencies understand your offerings / capabilities as they relate to the above ERM Elements you have selected.

If you have questions about the above ERM Elements and the information on NARA's Universal ERM Requirements spreadsheet, please contact NARA's Records Management Policy Team at rmpolicy@nara.gov.

Element 1 - Office Management Applications

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 1. Some example questions to consider are: Which office management applications does your service/solution manage (e.g. Microsoft 365, Google Workspace, etc.)? How do you associate Office Management documents with a records schedule? How do you apply metadata to Office Management documents?

The Alfresco Digital Business Platform provides out-of-the-box capabilities for office management, alleviating the need for 3rd party collaboration tools in many scenarios. These features include version control, redaction, annotations, basic workflow, and record management. The Alfresco Enterprise Viewer also provides the option to actively collaborate on documents and annotations in real-time.

Alfresco provides native connectivity directly to Office products via Alfresco Office Services. Office 365 is fully supported through an add-on plugin, available for an additional charge, which provides significantly higher functionality. Users can edit Microsoft Office documents including Word, Excel and PowerPoint that are stored in Alfresco from the Digital Workspace directly in Office 365 Online.

Alfresco also provides the Google Docs Integration, which allows you to use Google Docs to edit document content stored in Alfresco Content Services, as an alternative to the online and offline editing capabilities in Alfresco Share.

Alfresco provides a very flexible Content Model that allows you to create and manage your own custom property models. Customers can create custom types, aspects, and properties to apply to documents. Taxonomy is applied using rules within the Alfresco environment so that, when content is added, the proper content model (taxonomy) is applied to the added content. Once content is stored in the Alfresco content repository, moving it to Records Management can be triggered by a file rule, metadata properties, or ad-hoc user task.

Element 2 - Electronic Messages

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 2. Some example questions to consider are: Which electronic messages does your service/solution manage (e.g. SMS/MMS, iMessage, WhatsApp, social media messages, voicemail, etc.)? Are you able to capture SMS/MMS at the carrier-level? How do you apply metadata to electronic messages? Where are records stored (e.g. managed in the system in which they were created or in a dedicated recordkeeping system)?

Alfresco manages virtually any file format for storage, workflow, and records management capabilities. Records are stored in their native file format in the Alfresco repository, which can have a backend database of choice (Standard DB, S3 Bucket, etc.) There are purpose-built

integration methods for monitoring email messages for easy ingestion and metadata capture. Emails and attachments can be ingested into the Alfresco Content Services solution and made available via IMAP or the Outlook plugin. Alfresco then displays files using a transform engine to allow visibility through the Alfresco viewer. Alfresco does not support SMS/MMS capture at the carrier level, but using open APIs enables easy configuration to 3rd party tools built for this purpose.

Element 3 - Social Media

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 3. Some example questions to consider are: Which social media platforms does your solution/services capture and manage (e.g. Facebook, YouTube, Instagram, WordPress)? What technology is used to capture social media records? What frequency can your solution/services capture? How do you address changes in what social media platforms allow for capture?

Alfresco can manage social media posts as per any other content via use of Alfresco Federation Services. While the social media itself remains in its original storage location, it can be tracked and made subject to records management and additional Alfresco functions. The frequency of capture can be configured via the job scheduler, which can be trigger based, time-bsed, or a combination of the two.

Questions for Element 4 - Websites

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 51821OERM that help agencies meet Element 4. Some example questions to consider are: What technology do you use to crawl websites? Do you have the capability to capture internal and external sites? What formats do you use for web captures? Can you capture websites in NARA-acceptable formats? What quality assurance processes/tools do you offer?

Not applicable.

Questions for Element 5 - Photographs (Born-Digital and Scanned Images)

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 5. Some example questions to consider are: How do you associate Photographs with a records schedule? How do you apply metadata for categorization and searchability to Photographs?

The Alfresco DBP manages content in its native format, and based on that format, applies the necessary metadata related to the content type. For photos and digital images, Alfresco will apply standard metadata properties that include Name, Title, Author, Created Date, etc. - but in addition will apply metadata around the photo itself, including the EXIF data. The EXIF data includes data and time of capture, photo size, resolution, camera manufacturer, etc.

Photos and digital images are stored in the Alfresco content repository using the database of choice (S3 bucket, Standard DB, etc.), where Records Management capabilities can be applied in a variety of ways including folder rules, ad-hoc user task, or metadata properties.

Questions for Element 6 - Digital Audio and Video

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 51821OERM that help agencies meet Element 6. Some example questions to consider are: How do you associate Digital Audio and

Video files with a records schedule? How do you apply metadata for categorization and searchability to Digital Audio and Video?

Alfresco can import, store, and manage virtually any file format, including audio and video files. The Alfresco Enterprise Viewer provides viewing and redaction capabilities for photos or videos stored within Alfresco. Metadata properties are defined in the content modeler and can be driven based on folder rules or document type as they are ingested into Alfresco. Video and audio files are stored in the Alfresco content repository, where Records Management capabilities can be applied in a variety of ways including folder rules, ad-hoc user task, or metadata properties.

Questions for Element 7 - Structured Data

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 51821OERM that help agencies meet Element 7. Some example questions to consider are: What is your approach to managing structured data? Do you offer solutions additional to what the agency uses, work with their current systems, or both?

Alfresco provides a highly configurable content model allowing virtually any information to be captured as meta-data relevant to a content item. Meta-data stored is subject to the same records management capability as the content itself. Using this content model key structured data can be stored alongside unstructured data.

Questions for Element 8 - Shared Drives

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 8. Some example questions to consider are: What capabilities does your solution/services provide for identifying duplicates? What other organizational methods do you employ for managing shared drives?

Out of the box, Alfresco prevents uploading a file with the same name and will identify that via naming convention. Duplicate detection is also available via the search engine.

Alfresco recommends leveraging Federation Services for managing content stored in shared drives. Alfresco Federation provides a powerful and easy way to search and manage content federated from leading business systems and content management applications. Manage in place functionality allows you to access, control, and govern content residing in more than sixty different business and content repository types. This provides a single view of information across different content systems, by synchronizing content into Alfresco Content Services. By connecting information from different systems, you can provide a single view of information stored across multiple repositories.

Hyland Software, Inc. hereby certifies that we are capable of meeting all standards described in the solicitation and NARA's Universal Electronic Records Management Requirements attachment for each of the sections of ERM Elements we have proposed, as indicated above.

DocuSigned by:

F456386991B741F...

Hyland Software, Inc.

*(To be signed only by an **authorized principal,** with authority to bind the undersigned contractor)*

Leonard Kim_____
Name (Printed)

Chief Product Officer_____
Title

4/30/24_____
Date

Change log for Version 3.0

1. The following ERM Elements were removed or updated in order to remain at parity with the Elements listed in NARA's Universal Electronic Records Management Requirements spreadsheet (Version 3)
   o Removed Cloud Services
   o Removed Engineering Drawings
   o Changed Digital Media (Photo) to Photographs
   o Combined Digital Audio and Video
2. The following ERM Elements names have been updated to remove the reference to their former name used in Version 1 of this document:
   o Element 1 - Office Management Applications: removed "(formerly 'Desktop Applications')" from the Element name
   o Element 7 - Structured Data: removed "(formerly 'Databases')" from the Element name
3. Added requirement for contractors to provide a brief summary of awarded offerings for each ERM Element that they self-certify. Added instructional language along with example questions for each Element to assist contractors with their responses.

SIN 518210ERM Vendor Certification for Electronic Records Management Solutions
Version 3.0 (As of MAS Refresh 18)

For the purposes of the MAS Solicitation, eight (8) specific elements of Electronic Records Management (ERM) Services have been identified. These 8 elements are fully defined and the corresponding requirements are identified in NARA's *Universal Electronic Records Management Requirements* spreadsheet attachment to the Solicitation. These requirements have been established and are administered by the National Archives and Records Administration (NARA). Vendors may provide any combination of the 8 elements of ERM solutions; however, vendors must certify that they are capable of meeting all standards associated with the elements they propose by completing this self-certification. *Vendors must include a completed copy of this certification in their published GSA MAS Contract Price List to help illustrate their ERM capabilities to federal customer agencies.*

Proposed Elements of Electronic Records Management Services:
By selecting the below Elements, you are self-certifying you meet NARA's Universal ERM Requirements for that Element. Select all Elements that apply.

■ Element 1 - Office Management Applications
■ Element 2 - Electronic Messages
■ Element 3 - Social Media
■ Element 4 - Websites
■ Element 5 - Photographs (Born-Digital and Scanned Images)
■ Element 6 - Digital Audio and Video
■ Element 7 - Structured Data
■ Element 8 - Shared Drives

In the space below you must provide a brief summary description for each of the above Elements that you have checked off. The summary must include which ERM products/ services/ solutions — currently awarded under SIN 518210ERM of your MAS contract — are related to the respective Element. Example questions are provided for each Element to assist with your response. Those questions are based on NARA's Universal Electronic Records Management Requirements and reflect common questions from agencies. *If you cannot provide a summary description for a given Element, or you do not currently offer products/services/solutions under SIN 518210ERM related to that Element, you cannot self-certify that Element on this form.* Please use as much space as you need below, but be concise! Please respond as "Not applicable" for any Element you did not select above.

The specifics of your below responses are not part of the evaluation criteria for adding SIN 518210ERM. The intention of the below section is to assist agencies with market research and

help agencies understand your offerings / capabilities as they relate to the above ERM Elements you have selected.

If you have questions about the above ERM Elements and the information on NARA's Universal ERM Requirements spreadsheet, please contact NARA's Records Management Policy Team at rmpolicy@nara.gov.

Element 1 - Office Management Applications

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 1. Some example questions to consider are: Which office management applications does your service/solution manage (e.g. Microsoft 365, Google Workspace, etc.)? How do you associate Office Management documents with a records schedule? How do you apply metadata to Office Management documents?

The AvePoint platform broadly supports and manages data within office automation and productivity suites, including Microsoft (e.g., Office 365, Dynamics 365, Exchange, Power Platform…, etc.), Google Workspace, and Salesforce. For records management, AvePoint applies metadata tagging to support a records schedule using a rules-based engine that can include logic such as filename, location, contents, file type, etc., to apply management rules based on applied tags.

Element 2 - Electronic Messages

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 2. Some example questions to consider are: Which electronic messages does your service/solution manage (e.g. SMS/MMS, iMessage, WhatsApp, social media messages, voicemail, etc.)? Are you able to capture SMS/MMS at the carrier-level? How do you apply metadata to electronic messages? Where are records stored (e.g. managed in the system in which they were created or in a dedicated recordkeeping system)?

The AvePoint platform primarily supports SMS messages for Omni-channel communications in solutions for citizen services. Messages are captured using third-party communication solutions such as Twilio. Metadata is applied when content, including electronic messages, is captured in a supported repository. Records are stored using Microsoft content management and database solutions (e.g., SharePoint and Azure services).

Element 3 - Social Media

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 3. Some example questions to consider are: Which social media platforms does your solution/services capture and manage (e.g. Facebook, YouTube, Instagram, WordPress)? What technology is used to capture social media records? What frequency can your solution/services capture? How do you address changes in what social media platforms allow for capture?

The AvePoint platform captures messages that may be stored in office management applications, including Microsoft and Google. Metadata is applied when content, including social media content, is captured in a supported repository. However, it does not manage social media platforms directly (e.g., Facebook, YouTube, Instagram, WordPress).

Questions for Element 4 - Websites

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 4. Some example questions to consider are: What technology do you use to crawl

websites? Do you have the capability to capture internal and external sites? What formats do you use for web captures? Can you capture websites in NARA-acceptable formats? What quality assurance processes/tools do you offer?

The AvePoint platform will capture and manage data within internal sites (e.g., SharePoint). For internal/intranet sites on SharePoint, full-fidelity quality is ensured as metadata tags are applied directly to the source content in-place. The AvePoint platform does not currently crawl external websites/the web for capture.

Questions for Element 5 - Photographs (Born-Digital and Scanned Images)

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 5. Some example questions to consider are: How do you associate Photographs with a records schedule? How do you apply metadata for categorization and searchability to Photographs?

The AvePoint platform will capture and manage photographs by applying metadata tags to the digital file. The capability allows categorization, search indexing, and the enforcement of retention and disposal (and other management rules) as configured by admins in the platform. Metadata is applied when content, including photograph and general image content, is stored in a supported repository.

Questions for Element 6 - Digital Audio and Video

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 6. Some example questions to consider are: How do you associate Digital Audio and Video files with a records schedule? How do you apply metadata for categorization and searchability to Digital Audio and Video?

The AvePoint platform will capture and manage audio/video content by applying metadata tags to the digital file. The capability allows categorization, search indexing, and the enforcement of retention and disposal (and other management rules) as configured by admins in the platform. Metadata is applied when content, including digital audio and video content, is stored in a supported repository.

Questions for Element 7 - Structured Data

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 7. Some example questions to consider are: What is your approach to managing structured data? Do you offer solutions additional to what the agency uses, work with their current systems, or both?

The AvePoint platform captures data that may be stored in office management applications, including Microsoft and Google. Metadata is applied when content, including structured data, is captured in a supported repository (e.g., SharePoint, shared drives, file stores). However, the AvePoint platform does not directly capture structured data databases (e.g., CRM).

Questions for Element 8 - Shared Drives

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 8. Some example questions to consider are: What capabilities does your solution/services provide for identifying duplicates? What other organizational methods do you employ for managing shared drives?

The AvePoint platform integrates directly with Shared Drives and captures and manages file-share content by applying metadata tags to the files. The capability allows categorization, search indexing, and the enforcement of retention and disposal (and other management rules) as configured by admins in the platform. Other capabilities of the solution include a 'Storage Optimization' component that can analyze file content for "ROT" (Redundant, Obsolete, and Trivial) which includes identifying Duplicate files.

AvePoint hereby certifies that we are capable of meeting all standards described in the solicitation and NARA's Universal Electronic Records Management Requirements attachment for each of the sections of ERM Elements we have proposed, as indicated above.

AVEPOINT
Offeror

DocuSigned by:

Kevin Briggs

DE4713D18028445...

KEVIN BRIGGS
Name (Printed)

VP, PUBLIC SECTOR
Title

4/29/2024
Date

Change log for Version 3.0
1. The following ERM Elements were removed or updated in order to remain at parity with the Elements listed in NARA's Universal Electronic Records Management Requirements spreadsheet (Version 3)
   ○ Removed Cloud Services
   ○ Removed Engineering Drawings
   ○ Changed Digital Media (Photo) to Photographs
   ○ Combined Digital Audio and Video
2. The following ERM Elements names have been updated to remove the reference to their former name used in Version 1 of this document:
   ○ Element 1 - Office Management Applications: removed "(formerly 'Desktop Applications')" from the Element name
   ○ Element 7 - Structured Data: removed "(formerly 'Databases')" from the Element name
3. Added requirement for contractors to provide a brief summary of awarded offerings for each ERM Element that they self-certify. Added instructional language along with example questions for each Element to assist contractors with their responses.

SIN 518210ERM Vendor Certification for Electronic Records Management Solutions
Version 3.0 (As of MAS Refresh 18)

For the purposes of the MAS Solicitation, eight (8) specific elements of Electronic Records Management (ERM) Services have been identified. These 8 elements are fully defined and the corresponding requirements are identified in NARA's *Universal Electronic Records Management Requirements* spreadsheet attachment to the Solicitation. These requirements have been established and are administered by the National Archives and Records Administration (NARA). Vendors may provide any combination of the 8 elements of ERM solutions; however, vendors must certify that they are capable of meeting all standards associated with the elements they propose by completing this self-certification. *Vendors must include a completed copy of this certification in their published GSA MAS Contract Price List to help illustrate their ERM capabilities to federal customer agencies.*

Proposed Elements of Electronic Records Management Services:
By selecting the below Elements, you are self-certifying you meet NARA's Universal ERM Requirements for that Element. Select all Elements that apply.

■ Element 1 - Office Management Applications
■ Element 2 - Electronic Messages
■ Element 3 - Social Media
■ Element 4 - Websites
■ Element 5 - Photographs (Born-Digital and Scanned Images)
■ Element 6 - Digital Audio and Video
■ Element 7 - Structured Data
■ Element 8 - Shared Drives

In the space below you must provide a brief summary description for each of the above Elements that you have checked off. The summary must include which ERM products/ services/ solutions — currently awarded under SIN 518210ERM of your MAS contract — are related to the respective Element. Example questions are provided for each Element to assist with your response. Those questions are based on NARA's Universal Electronic Records Management Requirements and reflect common questions from agencies. *If you cannot provide a summary description for a given Element, or you do not currently offer products/services/solutions under SIN 518210ERM related to that Element, you cannot self-certify that Element on this form.* Please use as much space as you need below, but be concise! Please respond as "Not applicable" for any Element you did not select above.

The specifics of your below responses are not part of the evaluation criteria for adding SIN 518210ERM. The intention of the below section is to assist agencies with market research and

help agencies understand your offerings / capabilities as they relate to the above ERM Elements you have selected.

If you have questions about the above ERM Elements and the information on NARA's Universal ERM Requirements spreadsheet, please contact NARA's Records Management Policy Team at rmpolicy@nara.gov.

Element 1 - Office Management Applications

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 1. Some example questions to consider are: Which office management applications does your service/solution manage (e.g. Microsoft 365, Google Workspace, etc.)? How do you associate Office Management documents with a records schedule? How do you apply metadata to Office Management documents?

Gimmal Records manages records in-place, documents stored in SharePoint Online and On-Prem, Box, Documentum, FileNet and local Windows file shares. Documents are classified based on the metadata, location and content and a retention period is applied to them based on the records schedule assigned to the classification with support for multi-phased and prioritization of schedules. The metadata used to classify and manage the documents varies within the different repositories. Gimmal Records uses mechanisms available within each of the managed repositories to lock documents identified as records to prevent editing of these documents. Gimmal Records also supports multiple capabilities once a document has reached the end of its lifecycle:
- multi-level approvals
- mark as permanent to facilitate the long term retention of the document
- permanently delete from the source repository
- export to transfer to other archival repositories

Element 2 - Electronic Messages

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 2. Some example questions to consider are: Which electronic messages does your service/solution manage (e.g. SMS/MMS, iMessage, WhatsApp, social media messages, voicemail, etc.)? Are you able to capture SMS/MMS at the carrier-level? How do you apply metadata to electronic messages? Where are records stored (e.g. managed in the system in which they were created or in a dedicated recordkeeping system)?

Gimmal Records provides an integration for Microsoft Outlook that allows emails and attachments to be stored in SharePoint (online and on-premise) with metadata. Electronic messages exported from the source system into standard email formats can be classified and managed using the metadata of such files using mechanisms outlined in Element 1 above.

Element 3 - Social Media

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 3. Some example questions to consider are: Which social media platforms does your solution/services capture and manage (e.g. Facebook, YouTube, Instagram, WordPress)? What technology is used to capture social media records? What frequency can your solution/services capture? How do you address changes in what social media platforms allow for capture?

Gimmal Records does not directly capture data from social media platforms but if information captured from these platforms is saved into a standard file structure, Gimmal Records can be used to classify such files using the metadata and managed through its necessary lifecycle using mechanisms outlined in Element 1 above.

Questions for Element 4 - Websites
Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 4. Some example questions to consider are: What technology do you use to crawl websites? Do you have the capability to capture internal and external sites? What formats do you use for web captures? Can you capture websites in NARA-acceptable formats? What quality assurance processes/tools do you offer?

Gimmal Records does not crawl websites but if information captured from websites is saved into a standard file format, Gimmal Records can be used to classify such files using the metadata and managed through its necessary lifecycle using mechanisms outlined in Element 1 above.

Questions for Element 5 - Photographs (Born-Digital and Scanned Images)
Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 5. Some example questions to consider are: How do you associate Photographs with a records schedule? How do you apply metadata for categorization and searchability to Photographs?

Any digital image stored in a repository managed by Gimmal Records can be classified as a record. Once classified, Gimmal would manage the files through its lifecycle using the mechanisms outlined in Element 1 above.

Questions for Element 6 - Digital Audio and Video
Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 6. Some example questions to consider are: How do you associate Digital Audio and Video files with a records schedule? How do you apply metadata for categorization and searchability to Digital Audio and Video?

Any digital audio and video stored in a repository managed by Gimmal Records can be classified as a record. Once classified, Gimmal would manage the files through their lifecycle using the mechanisms outlined in Element 1 above.

Questions for Element 7 - Structured Data
Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 7. Some example questions to consider are: What is your approach to managing structured data? Do you offer solutions additional to what the agency uses, work with their current systems, or both?

Gimmal Records does not connect directly to structured data systems. However, structured data stored in accessible file formats, or reports generated from structured data systems, can be classified and managed using the mechanisms outlined in Element 1 above.

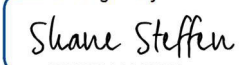## Questions for Element 8 - Shared Drives

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 8. Some example questions to consider are: What capabilities does your solution/services provide for identifying duplicates? What other organizational methods do you employ for managing shared drives?

Gimmal Records can access and manage documents stored on on-prem Windows servers, in SharePoint (on-prem and cloud) and Box repositories. The documents can be evaluated using metadata criteria and the content of text-based files to determine the appropriate classification and then managed through its lifecycle in-place.

[Offeror Name] hereby certifies that we are capable of meeting all standards described in the solicitation and NARA's Universal Electronic Records Management Requirements attachment for each of the sections of ERM Elements we have proposed, as indicated above.

DocuSigned by:

Shane Steffen

97922F0A4AA84C2...

Offeror

*(To be signed only by an **authorized principal**, with authority to bind the undersigned contractor)*

Shane Steffen

Name (Printed)

Chief Financial Officer

Title

June 17, 2024 | 9:25:41 AM CDT

Date

Change log for Version 3.0

1. The following ERM Elements were removed or updated in order to remain at parity with the Elements listed in NARA's Universal Electronic Records Management Requirements spreadsheet (Version 3)
   - Removed Cloud Services
   - Removed Engineering Drawings
   - Changed Digital Media (Photo) to Photographs
   - Combined Digital Audio and Video
2. The following ERM Elements names have been updated to remove the reference to their former name used in Version 1 of this document:
   - Element 1 - Office Management Applications: removed "(formerly 'Desktop Applications')" from the Element name
   - Element 7 - Structured Data: removed "(formerly 'Databases')" from the Element name
3. Added requirement for contractors to provide a brief summary of awarded offerings for each ERM Element that they self-certify. Added instructional language along with example questions for each Element to assist contractors with their responses.

SIN 518210ERM Vendor Certification for Electronic Records Management Solutions
Version 3.0 (As of MAS Refresh 18)

For the purposes of the MAS Solicitation, eight (8) specific elements of Electronic Records Management (ERM) Services have been identified. These 8 elements are fully defined and the corresponding requirements are identified in NARA's *Universal Electronic Records Management Requirements* spreadsheet attachment to the Solicitation. These requirements have been established and are administered by the National Archives and Records Administration (NARA). Vendors may provide any combination of the 8 elements of ERM solutions; however, vendors must certify that they are capable of meeting all standards associated with the elements they propose by completing this self-certification. _Vendors must include a completed copy of this certification in their published GSA MAS Contract Price List to help illustrate their ERM capabilities to federal customer agencies._

Proposed Elements of Electronic Records Management Services:
By selecting the below Elements, you are self-certifying you meet NARA's Universal ERM Requirements for that Element. Select all Elements that apply.

☒ Element 1 - Office Management Applications
☒ Element 2 - Electronic Messages
☒ Element 3 - Social Media
☒ Element 4 - Websites
☒ Element 5 - Photographs (Born-Digital and Scanned Images)
☒ Element 6 - Digital Audio and Video
☒ Element 7 - Structured Data
☒ Element 8 - Shared Drives

In the space below you must provide a brief summary description for each of the above Elements that you have checked off. The summary must include which ERM products/ services/ solutions — currently awarded under SIN 518210ERM of your MAS contract — are related to the respective Element. Example questions are provided for each Element to assist with your response. Those questions are based on NARA's Universal Electronic Records Management Requirements and reflect common questions from agencies. *If you cannot provide a summary description for a given Element, or you do not currently offer products/services/solutions under SIN 518210ERM related to that Element, you cannot self-certify that Element on this form.* Please use as much space as you need below, but be concise! Please respond as "Not applicable" for any Element you did not select above.

The specifics of your below responses are <u>not</u> part of the evaluation criteria for adding SIN 518210ERM. The intention of the below section is to assist agencies with market research and

help agencies understand your offerings / capabilities as they relate to the above ERM Elements you have selected.

If you have questions about the above ERM Elements and the information on NARA's Universal ERM Requirements spreadsheet, please contact NARA's Records Management Policy Team at rmpolicy@nara.gov.

Element 1 - Office Management Applications

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 1. Some example questions to consider are: Which office management applications does your service/solution manage (e.g. Microsoft 365, Google Workspace, etc.)? How do you associate Office Management documents with a records schedule? How do you apply metadata to Office Management documents?

The Proofpoint Enterprise Archive supports the archiving, storage and management of email from Microsoft Exchange and O365. Mail is sent to Proofpoint through the Journaling feature. Customers can create comprehensive Retention Policies in the Proofpoint UI and as messages are archived a Retention Policy that matches is applied. Messages are stored in a forensically sound, immutable manner, and stored in multiple locations. Storage is SEC 17a-4 compliant. Metadata is stored in association with the original messages allowing for an enriched experience in the UI.

[Response for Element 1 here — use as much space as you need. If you did not self-certify this Element in the above section, please put "Not Applicable."]

Element 2 - Electronic Messages

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 2. Some example questions to consider are: Which electronic messages does your service/solution manage (e.g. SMS/MMS, iMessage, WhatsApp, social media messages, voicemail, etc.)? Are you able to capture SMS/MMS at the carrier-level? How do you apply metadata to electronic messages? Where are records stored (e.g. managed in the system in which they were created or in a dedicated recordkeeping system)?

Proofpoint has build connectors to natively archive from the following platforms
1. Teams
2. Slack
3. Zoom
4. SharePoint
5. OneDrive
6. FaceBook
7. LinkedIn
8. Twitter
9. Instagram
10. YouTube
11. Bloomberg
12. Sales Force Chatter
13. Box
14. Viva Engage (fka Yammer)
15. Symphony

We also work with a network of third party connector vendors which allows us to support a huge variety of additional content types, like SMS/text (either carrier or device level), What's App etc.

Metadata can be added by Proofpoint and by third party providers during the capture phase of archiving and is stored in association with the messages.

Records are stored in the Proofpoint Enterprise Archive with is located in top-tier Proofpoint colocation facilities.

[Response for Element 2 here — use as much space as you need. If you did not self-certify this Element in the above section, please put "Not Applicable."]

Element 3 - Social Media
Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 3. Some example questions to consider are: Which social media platforms does your solution/services capture and manage (e.g. Facebook, YouTube, Instagram, WordPress)? What technology is used to capture social media records? What frequency can your solution/services capture? How do you address changes in what social media platforms allow for capture?

Proofpoint can capture and store data from the following Social Media platforms:
- FaceBook
- LinkedIn
- X (fka Twitter)
- Instagram
- YouTube

Typically we are capturing natively with the source platform APIs. Frequency of capture depends on the platform and the configuration we set up for customers, but is multiple times daily.

Managing changes in the source platforms is an ongoing activity and we maintain close relationships with these social media outlets to ensure we are as up to date as possible.

[Response for Element 3 here — use as much space as you need. If you did not self-certify this Element in the above section, please put "Not Applicable."]

Questions for Element 4 - Websites
Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 4. Some example questions to consider are: What technology do you use to crawl websites? Do you have the capability to capture internal and external sites? What formats do you use for web captures? Can you capture websites in NARA-acceptable formats? What quality assurance processes/tools do you offer?

Proofpoint works with third party providers to capture website information.   Their capabilities vary widely and customers are free to choose the right website capture tool that meets their requirements and store that data in a Proofpoint Archive.

[Response for Element 4 here — use as much space as you need. If you did not self-certify this Element in the above section, please put "Not Applicable."

Questions for Element 5 - Photographs (Born-Digital and Scanned Images)
Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 5. Some example questions to consider are: How do you associate Photographs with a records schedule? How do you apply metadata for categorization and searchability to Photographs?

We do not support archiving photographs as independent data elements. We, of course, support archiving photos if they are included in emails or other supported messages, but not independently.

[Response for Element 5 here — use as much space as you need. If you did not self-certify this Element in the above section, please put "Not Applicable."]

Questions for Element 6 - Digital Audio and Video

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 6. Some example questions to consider are: How do you associate Digital Audio and Video files with a records schedule? How do you apply metadata for categorization and searchability to Digital Audio and Video?

Video and Audio that is sent for storage in the archive can have retention policy applied during the archiving process. Retention can be based on the received date, file type, source platform etc. If transcripts are provided in text format, we can apply retention based on keywords in those transcripts. Metadata, like categorization tags, can be applied during the archiving process.

[Response for Element 6 here — use as much space as you need. If you did not self-certify this Element in the above section, please put "Not Applicable."]

Questions for Element 7 - Structured Data

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 7. Some example questions to consider are: What is your approach to managing structured data? Do you offer solutions additional to what the agency uses, work with their current systems, or both?

Proofpoint typically supports structured data in the form of spreadsheets. We can ingest various structured data file types and can usually index the contents making them easy to search through. Generally, we are not a structured data management solution.

[Response for Element 7 here — use as much space as you need. If you did not self-certify this Element in the above section, please put "Not Applicable."]

Questions for Element 8 - Shared Drives

Please provide a brief summary of your awarded offerings (products/services/solutions) under SIN 518210ERM that help agencies meet Element 8. Some example questions to consider are: What capabilities does your solution/services provide for identifying duplicates? What other organizational methods do you employ for managing shared drives?

We have extensive processes in place to reduce duplicates in the archive. This is especially so for email data. Deduplication starts during the journaling process where envelope wrappers allow for messages to multiple recipients can be collapsed into a single copy for archival purposes. Follow that we employ a "wait and compare" delay of a few minutes to deduplicate messages that are identical before moving to the next phase of the archiving process. We then apply hash values to messages and perform additional deduplication on messages that have the same hash value.

[Response for Element 8 here — use as much space as you need. If you did not self-certify this Element in the above section, please put "Not Applicable."]

Proofpoint, subject to the declarations made herein, certifies that we are capable of meeting all standards described in the attached spreadsheet NARA's Universal Electronic Records Management Requirements attachment for each of the applicable sections of ERM Elements we have proposed, as indicated above.

_____
Offeror
*(To be signed only by an **authorized principal**, with authority to bind the undersigned contractor)*

Kyle Chin
_____
Name (Printed)

GVP, General Counsel
_____
Title

9/23/2024
_____
Date

Change log for Version 3.0
1. The following ERM Elements were removed or updated in order to remain at parity with the Elements listed in NARA's Universal Electronic Records Management Requirements spreadsheet (Version 3)
   ○ Removed Cloud Services
   ○ Removed Engineering Drawings
   ○ Changed Digital Media (Photo) to Photographs
   ○ Combined Digital Audio and Video
2. The following ERM Elements names have been updated to remove the reference to their former name used in Version 1 of this document:
   ○ Element 1 - Office Management Applications: removed "(formerly 'Desktop Applications')" from the Element name
   ○ Element 7 - Structured Data: removed "(formerly 'Databases')" from the Element name
3. Added requirement for contractors to provide a brief summary of awarded offerings for each ERM Element that they self-certify. Added instructional language along with example questions for each Element to assist contractors with their responses.

Vendor Certification for SIN 493110RM –

493110RM Includes capabilities to manage the movement, manipulation, archiving, security, and management of physical records, including any ancillary supplies and/or services necessary to provide a total physical records management solution.

Vendor Certification for SIN 3361E –

3361E Includes electric and autonomous vehicles and accessories.

SIN 518210FM Financial Management Quality Service Management Office (FM QSMO) Core Financial Management (FM) Solutions and IT Professional Services –

518210FM Includes Core Financial Management Solutions (Core FS) and Financial Management (FM) services and solutions that are complementary to or augment Core FS and/or support agency modernizations. Offerings include financial management software suites in a cloud environment; services, applications, and modules that help agencies adopt FM QSMO solutions; and IT professional services and/or labor categories, software, cloud computing and IT training that support FM QSMO adoption.

Cooperative Purchasing: Yes
Set Aside: No
FSC/PSC Code : DB10

ATTACHMENT I - AUTHORIZED PARTICIPATING DEALERS

Carahsoft certifies that all dealers participating in the performance of this contract have agreed that their performance will be in accordance with all terms and conditions of this GSA Schedule.

For the complete listing of authorized participating dealers please see:

https://www.carahsoft.com/buy/gsa-schedule-contracts/gsa-multiple-

award-schedule-contract/authorized-dealers

ATTACHMENT II – Contractor Team Arrangements

Schedule Contractors participating in a Contractor Team Arrangement must abide by all terms and conditions of their respective contracts. This includes compliance with Clause 552.238-74, Industrial Funding Fee and Sales Reporting, i.e., each contractor (team member) must report sales and remit the IFF for all products and services provided under its individual contract.

For the complete listing of Contractor Team Arrangements, please contact Carahsoft for details.

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For the complete list of Commercial Supplier Agreements vetted and approved by GSA for inclusion into the GSA Schedule Contract, please see: https://www.carahsoft.com/buy/gsa-schedule-contracts/approved-csas

ATTACHMENT IV A – U.S. Government Adobe FITARA Addendum

Introduction

This Federal Supply Schedule Addendum supplements GSA Federal Supply Schedule Contract Number GS-35F-0119Y between Carahsoft Technology Corporation and the General Services Administration.

The Adobe Category Management Offering addresses current OMB Memorandum's (M-16-04, M-16-12), Circular A-130, OFPP and, GSA Federal Cyber, electronic government and Category Management policy requirements.

The Adobe Data Centric Security and Electronic Signature Solutions provide the best-in-class technology to the federal government. Providing a streamlined avenue for agencies to acquire Adobe technology through category management will improve the acquisition and management of the proposed solutions.

Solution 1	Adobe enterprise digital rights Category management

The Adobe Enterprise Digital Rights Management Bundle provides a DRM solution to documents allowing only people with specific credentials the ability to apply persistent protection to sensitive documents and information. With this level of dynamic protection you can revoke and change permissions within a document regardless of document location and you can protect against potential fraudulent activity. In addition, you can perform certificate based digital signatures on PDF documents when used with Acrobat*.

SKU	Description	List Price	GSA Price	Discount Level 1 >$5M Annual Spend*	Discount Level 2 >$15M Annual Spend*	Discount Level 3 >$20M Annual Spend*
210T-1423-DRM1	Adobe Enterprise Digital Rights Management Bundle 12 Months TERM Tier 1: Up to 1,000 Users	$405,600.00	$367,623.29	8%	15%	30%
210T-1423-DRM2	Adobe Enterprise Digital Rights Management Bundle 12 Months TERM Tier 2: Up to 5,000 Users	$625,600.00	$567,023.29	8%	15%	30%
210T-1423-DRM3	Adobe Enterprise Digital Rights Management Bundle 12 Months TERM Tier 3: Up to 10,000 Users	$1,251,200.00	$1,134,046.58	8%	15%	30%
210T-1423-DRM4	Adobe Enterprise Digital Rights Management Bundle 12 Months TERM Tier 4: Up to 25,000 Users	$2,777,400.00	$2,517,343.16	8%	15%	30%
210T-1423-DRM5	Adobe Enterprise Digital Rights Management Bundle 12 Months TERM Tier 5: Up to 50,000 Users	$5,554,800.00	$5,034,686.32	8%	15%	30%

Adobe Consulting Services are required with the purchase of each bundle listed above. The recommended number

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of hours per bundle are listed below.

- 210T-1423-DRM1 – Up to 165 Hours
- 210T-1423-DRM2 – Up to 330 Hours
- 210T-1423-DRM3 – Up to 330 Hours
- 210T-1423-DRM4 – Up to 490 Hours
- 210T-1423-DRM5 – Up to 670 Hours

Please note: the hours listed above are estimates. Each agency may require more or less hours depending on project scope. All service items are available to the government at the GSA Schedule Price.

*Discount Level Detail

Aggregate discounts are calculated on a per agency basis. Agencies are eligible for additional discounts based on the following;

- Level 1 Discount Level is reached when parent agency reaches annual spend of $5,000,000.00
- Level 2 Discount Level is reached when parent agency reaches annual spend of $15,000,000.00
- Level 3 Discount Level is reached when parent agency reaches annual spend of $20,000,000.00

Annual spend is calculated based on the total aggregate purchases made by any combination of sub agencies that fall underneath a parent agency in a 12 month period. The 12 month Period, or annual spend, is calculated based on the Adobe Fiscal Year which begins on December 1st. A full listing of eligible parent and sub agencies can be found on OPM.gov located HERE.

In addition to the bundle pricing and discounts offered in the chart above, Carahsoft would like to offer the government additional discounts for all Adobe Experience Manager and Analytics software available on the GSA Schedule. Upon the purchase of any bundle listed above the ordering agency will receive 7% off any additional** Adobe Term licenses. The initial period of performance for all eligible Adobe Term Licenses purchased will be 12 months. In the event an ordering organization should require a custom or pro-rated period of performance, we will work with the agency on a per opportunity basis. The additional 7% discount for add on licenses will be offered so long as ordering agency has an active DRM Bundle Term License.

We are dedicated to providing the Enterprise Digital Rights Management solution to all federal agencies regardless of agency size. The Adobe team welcomes the opportunity to support any ordering organization that may require less than 1,000 users and custom configurations may be discussed on a per opportunity basis.
Discounts cannot be combined with discounts offered on existing BPA's or contracts that an agency may have in place with Carahsoft or an authorized Adobe/Carahsoft reseller.
*Bundle requires supported version of Acrobat to be installed
**Additional discounts limited to Adobe Experience Manager and Analytics Software only, excludes services and training.

Adobe Digital Rights Management Bundle - Breakout

Product Description	1,000 Users Qty	5,000 Users Qty	10,000 Users Qty	25,000 Users Qty	50,000 Users Qty
Adobe Experience Manager Forms 6.2 – On Premise Term - Per Core - 12 Months	2	2	4	8	16
Adobe Experience Manager Document Security 6.2 – On Premise Term Minimum 1000 Recipients - Per Recipient - 12 Months	1,000	5,000	10,000	25,000	50,000
Adobe Insight Client License Per Named User (12 Month Term License)	1	1	2	4	8
Adobe Insight Reporting License - Per Server Add On (Min. Insight Purchase Required) (12 Month Term License)	1	1	2	4	8

Adobe Insight Data Transformation Functionality - License - Per Server (12 Month Term License)	1	1	2	4	8
Adobe Insight Sensor License - Per Web Server (Min. Insight Purchase Required) (12 Month Term License)	1	1	2	4	8
Adobe File Server Unit (FSU) License - Per Server (12 Month Term License)	1	1	2	4	8
Adobe Data Processing Unit (DPU) License - Per Server (Up To 500 Gb) (12 Month Term License)	1	1	2	4	8

Solution 2	Adobe Electronic Signatures category management

Adobe Sign

Adobe Sign is licensed in two ways: by signature transaction and by seat. The discounts below apply to either licensing model. Pricing for the following Adobe Sign products purchased shall be in accordance with the established GSA price list/rate less the applicable guaranteed minimum discount percentages specified in the table below. Current GSA SKU's and licensing models for Sign eligible for discounts listed below are;

Licensing Model: Per Seat/User

SKU	Description	List Price	GSA Price
210-7041-ES	Adobe Document Cloud for Enterprise - Premium eSign Services P2 - Per Seat - Purchase Min 5 Seats Req (300 Transactions per Seat Included) - 12 Months	$540.00	$527.76

Licensing Model: Per Transaction

SKU	Description	List Price	GSA Price
210-7041-T	Adobe Document Cloud for Enterprise - Premium eSign Services P2 - Per Transaction 1-300 Transaction Purchase Req (Existing eSign Account Required) – 12 Months	540.00	$527.76

Discounts are offered on a per total order basis as outlined in the table below:

Tier	Order Transaction Amount	Discount from GSA
Tier 1	$25,000.00 - $75,000.00	2%
Tier 2	$75,000.01 - $125,000.00	4%
Tier 3	$125,000.01 - $200,000.00	6%
Tier 4	$200,000.01 - $500,000.00	8%
Tier 5	$500,000.01 +	

*Discounts are not cumulative.

Discounts cannot be combined with discounts offered on existing BPA's or contracts that an agency may have in place with

Carahsoft or an authorized Adobe/Carahsoft reseller.

ATTACHMENT IV B – U.S. Government Nutanix FITARA Addendum

Introduction

This Federal Supply Schedule Addendum supplements GSA Federal Supply Schedule Contract Number GS-35F-0119Y between Carahsoft Technology Corporation and the General Services Administration.

The Nutanix Hybrid Cloud Infrastructure Category Management Offering addresses requirements of the Data Center Optimization Initiative (DCOI) established in OMB Memorandum M-16-19 and fulfills the data center requirements of the Federal Information Technology Acquisition Reform (FITARA).

Federal customers to date have selected configurations of Nutanix software, hardware and maintenance across 42 different configurations and 1,000s of individual part numbers. Our goal here is to offer incentives in the form of solutions of the Nutanix software, hardware and maintenance bought 90% of the time with full capabilities to build a hybrid cloud infrastructure. We also considered which of these configurations purchased line up consistently with what type of deployment, labeling each solution as such.

Incentives:

To enable agencies to quickly stand up Hybrid Cloud Infrastructure and incent them to leverage lessons learned from other agencies that have built Shared Services with Nutanix. Carahsoft and Nutanix are offering four types of Hybrid Cloud Infrastructure solutions and are described in detail with corresponding incentives offers for each:

- Hybrid Cloud Infrastructure Pilot/Micro Agency Solution (Solution 1)
- Hybrid Cloud Infrastructure Base Solutions (Solutions 2-4)
- Hybrid Cloud Infrastructure Scale out Solutions (Solutions 5-8)
- Hybrid Cloud Software Defined Datacenter Solutions (Solutions 9-10)

| SOLUTION 1 | Hybrid Cloud Infrastructure Pilot/Micro Agency Solution |

Description: Hybrid Cloud Infrastructure Pilot/Micro Agency Solution

Ideal agency investment to prove out Hybrid Cloud infrastructure, train administrators & have an entry point at minimum cost for pilots or micro agencies. Quantity one would be offered per agency/micro agency. Nutanix would also provide specific to workloads: test plans, summary of expected outcomes, federal customer references and a total cost of ownership economic study.

1. **Solution 1:** Hybrid Cloud Infrastructure Base Solution - Nutanix Initial Pilot/Micro Agency

SKU	DESCRIPTION	LIST PRICE	GSA PRICE	Offer Price
422-HC-PLT- SLN	Solution 1: Hybrid Cloud Infrastructure Base Solution - Nutanix Initial Pilot/Micro Agency	$164,960.62	$153,460.85	$81,242.66

| SOLUTIONS 2-4 | Hybrid Cloud Infrastructure Base Solutions |

Description: Hybrid Cloud Infrastructure Base Solutions

Hybrid Cloud Infrastructure Base Solutions with full Nutanix Hybrid Cloud Infrastructure capabilities 75% configured with descriptions that align with initial deployment strategy. Nutanix will offer this cumulative per year volume incentive per agency, starting over annually. Carahsoft will track and report on agency by agency consumption. Nutanix would be

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interested in advice to incent government Shared Service centers.

2. **Solution 2:** Hybrid Cloud Infrastructure base Solution - <u>Nutanix Enterprise Block</u>
3. **Solution 3:** Hybrid Cloud Infrastructure base Solution - <u>Nutanix Branch Office Block</u>
4. **Solution 4:** Hybrid Cloud Infrastructure base Solution - <u>Nutanix High Performance Flash Block</u>

SKU	Description	List Price	GSA Price	Discount Level 1	Discount Level 2	Discount Level 3	Discount Level 4	Discount Level 5	Discount Level 6	Discount Level 7
422-HC-B-ENT-SLN	Solution 2: Hybrid Cloud Infrastructure Base Solution - Nutanix Enterprise Block	$225,305.74	$209,635.52	$203,376.78	$202,437.65	$200,559.39	$198,681.14	$186,083.36	$184,205.10	$181,387.72
422-HC-B-BRANCH-SLN	Solution 3: Hybrid Cloud Infrastructure Base Solution - Nutanix Branch Office Block	$96,240.99	$89,530.56	$86,863.62	$86,479.63	$85,711.65	$84,943.67	$78,125.57	$77,357.59	$76,205.62
422-B-FLASH-SLN	Solution 4: Hybrid Cloud Infrastructure Base Solution - Nutanix High Performance Flash Block	$523,995.56	$487,682.63	$473,062.67	$470,727.78	$466,057.99	$461,388.20	$444,603.14	$439,933.35	$432,928.67

Discount Level Detail

Aggregate discounts are calculated on a per agency basis. Agencies are eligible for additional discounts based on the following;

- Level 1 Discount Level is reached when parent agency purchases 1 solution each year
- Level 2 Discount Level is reached when parent agency purchases 2-5 total solutions each year
- Level 3 Discount Level is reached when parent agency purchases 6-10 total solutions each year
- Level 4 Discount Level is reached when parent agency purchases 11-20 total solutions each year
- Level 5 Discount Level is reached when parent agency purchases 21-40 total solutions each year
- Level 6 Discount Level is reached when parent agency purchases 41-99 total solutions each year
- Level 7 Discount Level is reached when parent agency purchases 100+ total solutions each year

See Workload Sizing Guide matrix below for the Solution number applied to enterprise workloads that are linear scalable. Therefore, multiples of sizing metrics can be matched to agency requirements per workload type to calculate ROMs. All sizing must be validated by Nutanix SEs, so workload mix on a single Nutanix Hybrid cloud infrastructure is considered.

SOLUTIONS 5-8	Hybrid Cloud Infrastructure Scale out Solutions

Description: Hybrid Cloud Infrastructure Scale out Solutions

Hybrid Cloud Infrastructure Scale out Solutions with full Nutanix hybrid cloud infrastructure capabilities 100% configured with descriptions that align with scale out deployment strategy. Nutanix will offer this cumulative per year volume incentive per agency, starting over annually. Carahsoft will track and report on agency by agency consumption. Nutanix would be interested in advice to incent government Shared Service centers.

5. **Solution 5:** Hybrid Cloud Infrastructure Scale out Solution - <u>Nutanix Cold Storage Block</u>
6. **Solution 6:** Hybrid Cloud Infrastructure Scale out Solution - <u>Nutanix Enterprise Block</u>
7. **Solution 7:** Hybrid Cloud Infrastructure Scale out Solution - <u>Nutanix Branch Office Block</u>
8. **Solution 8:** Hybrid Cloud Infrastructure Scale out Solution - <u>Nutanix High Performance Flash Block</u>

SKU	Description	List Price	GSA Price	Discount Level 1	Discount Level 2	Discount Level 3	Discount Level 4	Discount Level 5	Discount Level 6	Discount Level 7
422-HC-SO-C-STOR-SLN	Solution 5 Hybrid Cloud Infrastructure Scale-Out Solution - Nutanix Cold Storage Block	$91,410.54	$85,044.56	$82,508.68	$82,136.40	$81,391.82	$80,647.24	$74,806.60	$74,062.03	$72,945.16
422-HC-SO-ENT-SLN	Solution 6 Hybrid Cloud Infrastructure Scale-Out Solution - Nutanix Enterprise Block	$314,851.08	$292,959.55	$284,210.40	$282,890.76	$280,251.48	$277,612.20	$260,612.75	$257,973.47	$254,014.55
422-HC-SO-BRANCH-SLN	Solution 7 Hybrid Cloud Infrastructure Scale-Out Solution - Nutanix Branch Office Block	$191,651.84	$178,328.29	$172,999.82	$172,191.93	$170,576.16	$168,960.39	$158,981.90	$157,366.13	$154,942.48
422-HC-SO-FLASH-SLN	Solution 8 Hybrid Cloud Infrastructure Scale-Out Solution - Nutanix High Performance Flash Block	$1,002,953.80	$933,507.02	$905,495.87	$900,960.76	$891,890.56	$882,820.35	$856,174.52	$847,104.31	$833,499.00

Discount Level Detail

Aggregate discounts are calculated on a per agency basis. Agencies are eligible for additional discounts based on the following;

- Level 1 Discount Level is reached when parent agency purchases 1 solution each year
- Level 2 Discount Level is reached when parent agency purchases 2-5 total solutions each year
- Level 3 Discount Level is reached when parent agency purchases 6-10 total solutions each year
- Level 4 Discount Level is reached when parent agency purchases 11-20 total solutions each year
- Level 5 Discount Level is reached when parent agency purchases 21-40 total solutions each year
- Level 6 Discount Level is reached when parent agency purchases 41-99 total solutions each year
- Level 7 Discount Level is reached when parent agency purchases 100+ total solutions each year

SOLUTIONS 9-10 Hybrid Cloud Software Defined Datacenter Solutions

Description: Hybrid Cloud Software defined datacenter

Hybrid Cloud Software defined datacenter and Tactical platforms with Nutanix Hybrid Cloud Infrastructure capabilities, applicable to a strategy where it is ideal to source validated and Nutanix supported hardware infrastructure separately from the Nutanix software. Nutanix would consider cumulative per year volume incentive, starting over annually.

9. **Solution 9:** Hybrid Cloud Software defined datacenter Solution – <u>4 node software only enterprise</u>
10. **Solution 10:** Hybrid Cloud Tactical infrastructure software Solution – <u>8 node software only tactical</u>

SKU	Description	List Price	GSA Price	Discount Level 1	Discount Level 2	Discount Level 3	Discount Level 4
422-HC-SW-TACT-SLN	Solution 9 Hybrid Cloud Software defined datacenter Solution	$81,600.00	$79,967.76	$74,419.20	$73,603.20	$72,787.20	$71,563.20
422-HC-SW-SSERV-SLN	Solution 10 Hybrid Cloud Tactical Infrastructure Software Solution	$163,200.00	$159,935.52	$148,838.40	$147,206.40	$145,574.40	$143,126.40

Discount Level Detail

Aggregate discounts are calculated on a per agency basis. Agencies are eligible for additional discounts based on the following;

- Level 1 Discount Level is reached when parent agency reaches annual spend of $500,000.00
- Level 2 Discount Level is reached when parent agency reaches annual spend of $1,000,000.00
- Level 3 Discount Level is reached when parent agency reaches annual spend of $2,000,000.00
- Level 4 Discount Level is reached when parent agency reaches annual spend of $5,000,000.00

Sizing is specific to Nutanix partner hardware platforms and available upon request from Nutanix systems engineers. All Nutanix validated and supported partner hardware platforms build and deploy systems by node count. Eight and four node solutions were selected because that is the full scale out configuration of the individual partner hardware platforms for enterprise and tactical solutions.

Nutanix Software capabilities that are included with each of the solutions to enable the Nutanix Hybrid Cloud infrastructure regardless of whether the hardware is procured from Nutanix or separately from a Nutanix certified and supported hardware vendor:

Webscale hyper converged architecture, Nutanix Acropolis application mobility fabric, Acropolis distributed storage fabric, PRISM Enterprise management, Acropolis hypervisor, Acropolis file services, Acropolis block services, Acropolis Container services, Nutanix Cloud Connect, Shared Service self-service portal, data locality, data tiering, compression, de- duplication, security hardening, security control monitoring, security control breach automated remediation, NIST security control documentation for ATO, 1 year HW and SW maintenance including all software updates with 24x7x365 phone support - 4 hr response with non-returned disk service.

ATTACHMENT IV C - U.S. Government VERITAS FITARA Addendum

Introduction

Veritas Enterprise Data Management empowers government departments, on the federal and local level, to combine key capabilities from a family of solutions that reduces complexity, streamlines operations, and empowers agencies to recognize enormous business value.

With Veritas Enterprise Data Management solutions, federal agencies can have the insight and availability they need to understand what information they have, know how to keep it protected, and realize what they should delete. This leads to the best possible return on information (ROI): the ability to gain better visibility and insight into unstructured data and to control, store, and protect citizen information.

SOLUTIONS Enterprise Data Management Solutions

Carahsoft will provide the following Veritas Enterprise Data Management Solutions through the GSA Schedule at the following discount options.

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Product Family	Description/Business Value
360 DATA MANAGEMENT	Veritas 360 Data Management offerings provide data visibility, compliance readiness, business continuity, data protection and recoverability, while maintaining data/workload portability and storage optimization All product SW/HW components are included *See Bundle Information on page
DATA INSIGHT	Veritas Data Insight helps organizations improve unstructured data governance to reduce costs, reduce risk, and achieve compliance through actionable intelligence into data ownership, usage, and access controls All product SW components
EDISCOVERY	From ECA and keywords to concepts and TAR, Veritas' eDiscovery Platform provides the ultimate analysis toolkit for isolating potentially relevant items, revealing context, and prioritizing what's most important 8100/8200 APPLIANCES, Collector SW all included
EV 247	EV 247 frees customers from the overheads of owning, running, or managing email and file archives by leveraging Microsoft Azure cloud platforms, powered by the world's leading archiving technology. This is a cloud platform, software archiving solution, and managed service all in one All product SW components, cloud storage, and management fees are included
INFOSCALE	Veritas InfoScale minimizes downtime by providing high availability and disaster recovery over any distance for your critical business services, including individual databases, custom applications, and complex multitier applications across physical and virtual environments All product SW components included

Enterprise Data Management Platform – Aggregate (Both Product & Services) Agency Spend with Initial Enterprise Support and Service Option from Below	**Discount Level 1 >$3M Annual Spend***	**Discount Level 2 >$8M Annual Spend***	**Discount Level 3 >$15M Annual Spend***
	2%	5%	10%

One of the following Veritas Consulting Services are strongly recommended with the purchase of each product family listed above. The Service Descriptions and recommended number of hours per family is listed below:

Service Option	Service Personnel	Service Description
1	Business Critical Services Assist (BCS) – Proactive Product Account Management	Business Critical Services (BCS) Assist. Provides a designated, accountable Business Critical Coordinator (BCC) to oversee, support delivery, and assist with case management and escalations during local business hours for rapid response, priority queuing, helps ensure preventable issues don't recur (through quarterly reporting), and that solutions and recommendations are documented for future reference.

2	Remote Product Specialist (RPS) - On- Call, Dedicated Specialist	Remote Product Specialists (RPS). Get your mission critical application up and running as quickly as possible in the event of an issue or an unplanned outage. Includes an assigned, advanced level product expert to personalize your support experience and ensure priority call queuing.
3	On-Site Business Critical Engineer (BCE) - On-Site Resource	A Business Critical Engineer (BCE). Optimizes the Veritas environment. The BCE can minimize downtime by identifying potential issues before they impact performance and help optimize solutions so that each product feature is used fully to maximize the value from your software investment

Recommended Minimum by Discount Level – Services Only

Aggregate Revenue for Agency	Services Discount Level	Recommended Service Options		
		BCS	RPS	BCE Consultant FTE = 2040 hrs
$0 - $8M	Discount Level 1 (2%)	1 / per product	1/ per product	500 Hours
$8M - $15M	Discount Level 2 (5%)	1 / per product	1 / per product	1,020 Hours
>$15M	Discount Level 3 (10%)	2 / per product	2 / per product	2,040 Hours

SUPPORT SKUs for NetBackup

For any agency with NetBackup currently installed or with the initial purchase of NetBackup, premier services offerings are available through the following bundles on the Carahsoft GSA. Offered skus are inclusive of Netbackup licensing, estimated service hours below, and either a SW or HW based Netbackup appliance.

As a rule of thumb, Veritas and Carahsoft recommend the following estimates of service hours in support of our software installations. These estimates are based on Front End TB count of the backup environment:

- < 100TB – 80 hours
- 101-250TB – 120 hours
- 250-500TB – 180 hours
- > 500TB – 240 hours

Please note: the hours listed above are estimates. Each agency may require more or less hours depending on project scope. All service items are available to the government at the full GSA Schedule price.

Per Agency Aggregate Spend Detail

Aggregate discounts are calculated on a per agency basis. Agencies are eligible for additional discounts based on the following:

- Level 1 Discount Level is reached when parent agency reaches annual spend of $3,000,000.00
- Level 2 Discount Level is reached when parent agency reaches annual spend of $8,000,000.00
- Level 3 Discount Level is reached when parent agency reaches annual spend of $15,000,000.00

Annual spend is calculated based on the total aggregate purchases made by any combination of sub agencies that fall underneath a parent agency in a 12 month period. The 12 month Period, or annual spend, is calculated based on the *Veritas Fiscal Year which begins on April 1st*. A full listing of eligible parent and sub agencies can be found in the Appendix.

The initial period of performance for all support/maintenance contracts that come with eligible Veritas Licenses purchased will be 12 months. In the event an ordering organization should require a custom or pro-rated period of performance, we will work with the agency on a per opportunity basis.

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We are dedicated to providing the Enterprise Data Management solutions to all federal agencies regardless of agency size. The Veritas team welcomes the opportunity to support any ordering organization that may require less than 1,000 users and custom configurations may be discussed on a per opportunity basis.

Discounts cannot be combined with discounts offered on existing Blanket Purchase Agreements or contracts that an agency may have in place with Carahsoft or an authorized Veritas/Carahsoft reseller.

For the full pricelist table please use the following link:
https://www.carahsoft.com/application/files/4615/4418/8823/VERITAS_TC_TABLE.pdf

ATTACHMENT V – Approved IT Manufacturers

Approved IT Manufacturers:

Please reference GSA eLibrary:

https://www.gsaelibrary.gsa.gov/ElibMain/contractorInfo.do?contractNumber=4

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RATION&executeQuery=YES