

# REQUEST FOR PROPOSALS

## *One Card Program*

RFP # 2019.1

Jointly Issued By:

*Youngstown State University*

1 University Plaza  
Youngstown, Ohio 44555

&

*The Cooperative Council of Governments  
On Behalf of Sourcing Alliance*

6001 Cochran Road, Suite 333  
Cleveland, Ohio 44139

Dated:

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## REQUEST FOR PROPOSALS (RFP) YSU & SOURCING ALLIANCE: ONE CARD PROGRAM

### TABLE OF CONTENTS:

<b>SECTION I.</b>	<b>GENERAL PURPOSE &amp; SUPPLIER INFORMATION .....</b>	<b>1</b>
1.1	YOUNGSTOWN STATE UNIVERSITY OVERVIEW .....	1
1.2	YSU CURRENT ENVIRONMENT .....	1
1.3	YSU DESIRED FUTURE STATE .....	3
1.4	SOURCING ALLIANCE OVERVIEW .....	7
1.5	TWOFOLD PURPOSE OF THIS RFP .....	10
1.6	ANTICIPATED PROCUREMENT TIMETABLE .....	11
1.7	EMAIL QUESTION & ANSWER (Q&A) PERIOD .....	12
1.8	COMMUNICATIONS PROHIBITED .....	13
1.9	TIME FRAMES & FUNDING AVAILABLE .....	13
<b>SECTION II.</b>	<b>RFP REQUIREMENTS &amp; PRICING.....</b>	<b>14</b>
2.1	INITIAL QUALIFYING CRITERIA .....	14
2.2	REQUIREMENTS & PROPOSAL SPECIFICATIONS .....	14
2.3	COST PROPOSAL & PRICING TEMPLATE .....	14
2.4	SOURCING ALLIANCE MODEL CONTRACT .....	14
2.5	YOUNGSTOWN STATE UNIVERSITY MODEL CONTRACT .....	15
<b>SECTION III.</b>	<b>CONDITIONS &amp; OTHER REQUIREMENTS .....</b>	<b>16</b>
3.1	INTERVIEW .....	16
3.2	START WORK DATE .....	16
3.3	PROPOSAL COSTS .....	16
3.4	TRADE SECRETS PROHIBITION; PUBLIC INFORMATION DISCLAIMER .....	16
3.5	GROUP PURCHASING AGREEMENT REQUIREMENTS.....	17
3.6	PUBLIC RELEASE OF RECORDS .....	17
3.7	KEY PERSONNEL .....	18
3.8	ETHICAL & CONFLICT OF INTEREST REQUIREMENTS .....	18
3.9	HEALTH INSURANCE PORTABILITY & ACCESSIBILITY ACT (HIPAA) REQUIREMENTS.....	18
3.10	WAIVER OF MINOR PROPOSAL ERRORS.....	18
3.11	PROPOSAL CLARIFICATIONS .....	19
3.12	UNRESOLVED FINDINGS FOR RECOVERY (R.C. 9.24) .....	19
3.13	MANDATORY CONTRACT PERFORMANCE DISCLOSURE .....	19
3.14	MANDATORY DISCLOSURES OF GOVERNMENTAL INVESTIGATIONS.....	19
<b>SECTION IV.</b>	<b>PROPOSAL FORMAT &amp; SUBMISSION .....</b>	<b>20</b>
4.1	PROPOSAL SUBMISSION INFORMATION .....	20
4.2	FORMAT FOR ORGANIZATION OF THE PROPOSAL .....	21
<b>SECTION V.</b>	<b>CRITERIA FOR PROPOSAL EVALUATION &amp; SELECTION .....</b>	<b>23</b>
5.1	SCORING OF PROPOSALS.....	23
5.2	REVIEW PROCESS CAVEATS .....	25
5.3	FINAL SUPPLIER RECOMMENDATION .....	25
5.4	TIE BREAKER.....	25
<b>SECTION VI.</b>	<b>RFP PROTEST PROCEDURE.....</b>	<b>26</b>
6.1	PROTESTS.....	26
6.2	CAVEATS.....	26
<b>SECTION VII.</b>	<b>ATTACHMENTS &amp; THEIR USES.....</b>	<b>27</b>

7.1	ATTACHMENT A - TECHNICAL PROPOSAL REQUIREMENTS & SPECIFICATIONS.....	27
7.2	ATTACHMENT A - YSU POINT OF SALE MAP.....	27
7.3	ATTACHMENT B - COST PROPOSAL.....	27
7.4	ATTACHMENT C - REQUIRED RESPONDENT INFORMATION & CERTIFICATIONS.....	27
7.5	ATTACHMENT D - HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL.....	27
7.6	ATTACHMENT E - W-9 FORM.....	27
7.7	ATTACHMENT E - YSU NEW VENDOR REQUEST FORM.....	27
7.8	ATTACHMENT F - SOURCING ALLIANCE GROUP PURCHASING AGREEMENT TEMPLATE .....	27
7.9	ATTACHMENT F – YSU MODEL CONTRACT .....	27
7.10	ATTACHMENT G - PROPOSAL SCORE SHEET .....	28

## REQUEST FOR PROPOSALS (RFP) YSU & SOURCING ALLIANCE: ONE CARD PROGRAM

### SECTION I. GENERAL PURPOSE & SUPPLIER INFORMATION

#### 1.1 Youngstown State University Overview

Youngstown State University (“YSU” or the “University”) anticipates enhancing the campus ID system, point of sale system, and card production function as a result of this RFP process. Campus card industry standards have changed significantly since the inception of the relationship with our current card provider. YSU is striving for a one card solution that can encompass the entire campus and will be able to handle any future needs as the school grows its card system functionality. The University needs to increase the convenience and security of services through the adoption of new card technology and adapt to ever-changing technology and trends of one card systems. The equipment that is used daily with our existing campus card is antiquated and needs to be replaced in the process.

Founded in 1908, Youngstown State University is an American research university located in Youngstown, Ohio. The University's origins trace back to 1908 when the local branch of the YMCA established a school of law within the Youngstown Association School. In 1921, the school became known as the Youngstown Institute of Technology and offered its first evening courses. In 1928, the institute once again changed its name to Youngstown College. In 1955, Youngstown College was renamed as Youngstown University, and on September 1, 1967, after becoming a public institution, Youngstown University officially became known as Youngstown State University.

Youngstown State University is primarily a commuter school, with most students living within the following five-county area, Trumbull (OH), Mahoning (OH), Columbiana (OH), Mercer (PA), and Lawrence (PA). The University offers approximately 1,000 student beds in traditional style residence halls and an additional 408 beds in the University Courtyard apartment complex located on campus. All the buildings are currently owned by Youngstown State University. Additional campus housing has become available with various off-campus housing partners. These partnerships have provided opportunities to the housing partners to either build on or near the YSU campus. The result is an additional 690 beds for currently enrolled students. The spring 2019 total enrollment is 11,900 students and has grown steadily over the past seven semesters. About 4% of the student body are international students from approximately 45 countries. Youngstown State University employs an estimated 2,000 full-time and part-time employees.

The Youngstown State University campus lies on 140 plus acres just north of downtown Youngstown. The campus itself is beautifully landscaped which sets it apart from most other urban institutions, and the campus core has a park-like atmosphere, featuring a variety of trees and plant life, as well outdoor seating and outdoor water fountain.

#### 1.2 YSU Current Environment

Approximately 25,000 Active Card Holders

Card Production System

- IDWorks 6.5
- (2) Data Card SP75+ Printers
- (2) Canon Rebel EOSxs Cameras

Card Transaction System: CBORD

Patron mass import/edit and batch processing capabilities

#### Automated scheduled reporting

- Custom date range for reporting/ Crystal Reports

#### Care Technology: Magnetic stripe

- Card numbering: customer number with issue code

#### Mobile e-commerce app: GET

- Purchase declining balance points
- Check balances
- Mobile credentials (not using)
- Photo submission

#### Off-Campus Merchant Program: Ugryd

- (13) Merchants on the program

#### Devices

- Please see [Attachment A - YSU Point of Sale Site Map](#) for current terminals and locations
- (21) Micros POS Terminals Running Micros 3700
- (17) Workstation 5A
- (4) Workstation 4
- (5) KDS
- (32) Micros Cash Drawers
- (5) Bump Bars
- (21) Pole displays
- (21) Receipt printers
- (3) Kitchen printers
- (1) Scales

#### Data Sources

- Banner (Patron import and Bio/Demo data)
- All photos are then exported back to the Banner FTP folder in Jpeg format.

#### Responsible Offices

- Kilcawley Center (Card Office / POS System Management / Other Meal Plans)
- Housing & Residence Life (Resident Meal Plans)
- Information Technology Services (Data Integrations / Server and Network Infrastructure)

#### Card Uses

- Stored value accounts (Declining Balances)
- Dining Services (Board Swipes)
- Library (uses track 3 on mag stripe)

- Recreation Center (uses track 3 on mag stripe)
- Off campus dining
- Event attendance tracking (Via POS machines with a card swipe)
- Point of Sale Systems

#### Door Access Systems

- DSX (Housing & Residence Life External Doors to three resident halls)
- Prox cards separate from student ID
- Lenel (Information Technology Services high security areas)
- HID Card technology/prox cards (Weigand door readers)

### 1.3 YSU Desired Future State

#### Data Integrations:

##### Banner

##### E-commerce site for meal plan purchases

- Possible integration with dining vendors existing e-commerce site
- Real time integration is preferable

##### Star Rez (Housing & Residence Life platform for resident students)

- Provisioning resident meal plans
- Possible access control integration (see below)

##### Barnes and Noble Bookstore

- POS transactions at the bookstore
- Book allowance tender on the ID card

##### Webtrition

- Menu management system and nutritional system

##### Access control systems on campus

- There are currently at least 2 access control systems on campus that are not integrated with the ID card system
- We are willing to consider either:
  - Integrating with the existing systems
  - Replacing the existing systems

#### Card Technology:

- Add NFC capabilities
- Transition to ISO card number format
- Would also like a system with mobile credential capabilities
- Keep mag stripe technology with 3 tracks

#### Card Production Process:

- Web-based ID card design studio and production
- Networked ID card printers with remote printing capabilities
- Supports online photo submission
- ID printers that encode the card technology
- Ability to batch print ID cards

#### Expanded Usage of the Card System:

- Access control
- Parking gate access (T2 Systems)
- Customer loyalty / reward program functionality
- Mobile register capabilities for POS and event attendance/ class attendance
- Customer / permission validation
  - Athletic events / performing arts / health center / etc.
- Student printing (currently utilizing PaperCut)
- Integrate with Pharos

#### POS System:

- YSU is open to changing the layout of our current footprint of POS machines through new and innovative solutions
- POS system must meet the franchises functionality requirements that speaks to the "Dynamic Routing" between the POS and kitchen monitors. Currently Chick-Fil-A/ Dunkin Donuts
- Web-based interface for system configuration
- All POS must be EMV/P2PE compliant
- POS system must support multiple credit card processor merchant accounts
- Proposed POS must accept mobile payment and accept proposed card technology
- Ability to enter customers name when placing orders

#### Financial:

- Possibility to use card with a financial partner (currently PNC)
- Prefer all web-based interface for system configuration
- Prefer managed off-campus merchant solution

#### Food Service Provider & Meal Plan Information:

Chartwells Dining, a part of Compass Group, is the University's contracted food service provider. Chartwells Dining works in conjunction with the Kilcawley Student Center at YSU to provide a retail dining operation, commuter meal plan operation, and catering services. Chartwells works in conjunction with the Office of Housing & Residence Life at YSU to provide a residential dining operation.

#### Meal Plan Components and Plans:

There are three components to a meal plan at the University. Meal swipes are prepaid meal allowances each week for use at Christman Dining Commons. Meal swipes reset weekly. Students can use a maximum of four meals swipes per day. The second component are Flex Dollars, a declining balance account. Flex Dollars are used to purchase food items at all the locations managed by our dining provider, Chartwells. Unused balances roll from fall to spring semester. After spring semester all balances reset.

The final component to a meal plan is Pete's Points. Pete's Points are a declining balance account and are used to purchase food at any dining location on campus and at selection location off campus. Unused balances roll from fall to spring semester. After spring semester all balances reset.

A list of current meal plans and declining balances offered at the University are below:

Plan Name	Meal Swipes	Flex Dollars	Pete's Points
12 Meal Plan (Gold)	12 per week	\$550.00	\$150.00
12 Meal Plan (Silver)	12 per week	\$450.00	\$150.00
12 Meal Plan (Bronze)	12 per week	\$350.00	\$150.00
8 Meal Plan (Gold)	8 per week	\$600.00	\$300.00
8 Meal Plan (Silver)	8 per week	\$500.00	\$300.00
8 Meal Plan (Bronze)	8 per week	\$400.00	\$300.00
5 Meal Plan (Gold)	5 per week	\$700.00	\$450.00
5 Meal Plan (Silver)	5 per week	\$600.00	\$450.00
5 Meal Plan (Bronze)	5 per week	\$500.00	\$450.00
75 Block	75 per semester	\$100.00	\$0.00
50 Block	50 per semester	\$125.00	\$0.00
30 Block	30 per semester	\$150.00	\$0.00
20 Block	20 per semester	\$175.00	\$0.00
300 Declining Balance	0	\$265.00	\$50.00
450 Declining Balance	0	\$425.00	\$50.00
650 Declining Balance	5 per semester	\$600.00	\$50.00
\$99 Sampler plan	6 per semester	\$50.00	\$0.00

**Locations to Use Meal Plans:**

Off-Campus locations that students can use their meal plan is through Pete's Points at select off-campus locations. Those locations include:

1. Barnes & Noble Café
2. Charlie Staples Bar-B-Que
3. Cocca's Pizza
4. Collections Café
5. Cultivate Café
6. Hot Head Burritos
7. Jimmy John's
8. McDonald's
9. Pressed Coffee Bar & Eatery
10. Republic Pizzeria E Pub
11. Stone Fruit Coffee Co.
12. Subway
13. Wendy's

On-Campus dining locations run by our food service provider, Chartwells, are listed below and in the Youngstown State Dining Map. Those Locations include:

1. Dunkin' Donuts



2. Tu Taco
3. 2.Mato
4. The Den
5. Chop'd & Wrap'd
6. Hissho Sushi
7. Maag Café
8. Cushwa Café
9. Jamba Juice
10. Chick-Fil-A
11. Christman Dinning Commons
12. Schwebel Café
13. YSU Performance Center

#### **IT Requirements - University Systems:**

Youngstown State University prefers a SaaS delivery model, where this is feasible.

The University utilizes Banner 9 from Ellucian as the Enterprise Resource Planning (ERP), student information (SIS) and finance system. Banner data is stored in an Oracle 12 database running on an AIX platform. Banner Self-Service runs on an Oracle Linux platform.

TouchNet provides the commerce system and payment gateway.

Mobile devices and mobile applications (Ellucian Mobile, OOHLALA Mobile)

University Bookstore (Barnes and Noble College)

Housing Management System (StarRez)

Recreation Center (Fusion by Innosoft)

Print Management (PaperCut)

Student Health Center (Mercy Health)

Parking Management (T2 Systems)

#### **IT Requirements - Data Security:**

The system must exercise industry standard protocols to ensure the protection of any data stored and transmitted in the system, including:

- Securing physical servers, storage, etc.
- Firewalls to protect against unauthorized access.
- SSL encryption on websites.
- PCI DSS compliant payment systems and environment
- SOC II Type II compliance

#### IT Requirements - System Availability:

The system must provide redundant/failsafe servers, which ensure at least 99.9% uptime of all components of the system, including:

- IVR, including the availability of live customer service representatives.
- Mobile applications.
- User and administrator websites.

#### IT Requirements - Payment Security:

DEFINITIONS USED:

- **SAQ** means Self-Assessment Questionnaire, a reporting tool used to document self-assessment results from an entity's PCI DSS assessment.
- **PCI** means, Payment Card Industry.
- **DSS** means, Data Security Standard, set by the PCI Security Standards Council.
- **CHD** means, Card Holder Data.
- **DR** means, Disaster Recovery the ability to recover from major incidents.
- **BCP** means, Business Continuity Planning the ability to continue business operations.

YSU is seeking a campus payment card supplier in an effort to provide convenience to students for a variety of services. These services include, but are not limited to, identification and payment for services. PCI-DSS compliance is critical.

YSU seeks a supplier with independent auditor testing results attesting to accurate and thorough assessment of the potential risks and vulnerabilities to the confidentiality, integrity, and availability of cardholder data (CHD) as well as the remediation and mitigating steps taken to address any recommendations or matters requiring attention.

YSU seeks a supplier with documented security standards and practices used to safeguard CHD. This may include, but is not limited to, encryption technologies, gap analysis, networking topologies, DR/BCP and documented/tested incident response procedures.

YSU seeks a supplier who can provide applicable acceptable use policies, information security training/onboarding/testing, and frequency of corporate network wide vulnerability scans on a periodic basis.

YSU seeks a supplier who can document and describe available management responses to internal and external corporate network wide penetration testing, to include periodic vulnerability scans in addition to schedules of such activities.

#### 1.4 [Sourcing Alliance Overview](#)

This request for proposal ("RFP") is published by the Cooperative Council of Governments ("CCOG") for the purpose of creating a One Card program (the "Program") that will be available to current and future members of Sourcing Alliance ("Sourcing Alliance Members" or the "Members").

Sourcing Alliance's purpose is simple: to enable Members to more effectively fulfill their purpose by leveraging group purchasing and procurement expertise to save Members time and money, unleashing financial and human capital to reinvest in providing the best possible service to their constituents, customers, and stakeholders.

CCOG is a Council of Governments organized under Chapter 167 of the Ohio Revised Code. It is a political subdivision and special purpose public sector entity. CCOG is Sourcing Alliance's lead public agency and, in that role, develops program specifications for various products and services and conducts a formal public sector competitive solicitation process in compliance with applicable public sector procurement guidelines to select a winning supplier (the "Winning Supplier"). The

group purchasing agreement (the “**Group Purchasing Agreement**”) established between CCOG and the Winning Supplier is an already-procured contract vehicle upon which current and prospective Sourcing Alliance Members can “**piggyback**” to purchase products and/or services from the Winning Supplier without having to conduct their own bid or request for proposal process, similar to state term contracts and GSA schedules.

Collaborent Group, Ltd. (“**Collaborent**”) is a management consulting firm that serves as the administrative representative for both CCOG and Sourcing Alliance. Collaborent manages CCOG’s procurement, supplier relationship, marketing, sales, reporting, and financial activities.

At the conclusion of this RFP process, CCOG will award a contract to a Winning Supplier. That Group Purchasing Agreement will be a three-party agreement between the Winning Supplier (as the service provider), CCOG (as the public sector contract holder), and Collaborent (as the Program manager, contract manager, and marketing services team). The Winning Supplier and Collaborent will work closely together to develop and implement marketing and sales strategies to drive program adoption with current and future Sourcing Alliance Members across the country; there are approximately 92,000 local governments (such as municipalities, counties, and special districts) and educational institutions (K-12 schools, colleges, and universities) eligible to join Sourcing Alliance and piggyback on Sourcing Alliance’s already-procured contracts. Throughout this RFP document, CCOG and Collaborent are collectively referred to as “**Sourcing Alliance**”.

This Program presents the Winning Supplier with a unique opportunity to accelerate its public sector sales from coast to coast and reduce the cost of its public sector sales. Collaborent will serve in a leadership role to develop and implement targeted marketing strategies, train the Winning Supplier’s sales team in how to effectively utilize the already-procured Group Purchasing Agreement to capture public sector business, and support the actual sales process through collateral development, training, and responding to prospect questions regarding the procurement process and how the prospects can legally and appropriately buy services from the Winning Supplier without having to conduct their own bid or RFP processes.

### **The Mantra of Every Public Sector Group Purchasing Organization**

Like virtually every other nationwide public sector group purchasing organization (“**GPO**”), Sourcing Alliance works with a lead public procurement agency (CCOG) that is legally empowered to conduct RFP processes, enter into cooperative purchasing agreements, and make those cooperative purchasing agreements available to public sector organizations such as: municipalities, K-12 school districts, counties, higher education institutions, special districts, and state and federal agencies across the country. Sourcing Alliance:

- Ensures compliance by following public sector purchasing guidelines to procure cooperative agreements for the products and services Members purchase
- Leverages Members’ combined buying power to establish better pricing and favorable contract terms from Sourcing Alliance’s selected supplier partners (“**Supplier Partners**”) than Members can secure on their own

What does that mean for Members? Members can confidently purchase through Sourcing Alliance agreements without conducting their own bid/RFP processes to save time and money while remaining in full compliance with applicable procurement laws.

What does that mean for Supplier Partners? **Under applicable state statutes, virtually any public sector entity in the country that joins Sourcing Alliance can purchase products and services through these Sourcing Alliance contracts without having to conduct their own RFP or bid process, thereby saving both themselves and Supplier Partners significant time and money.**

## Member Perspective: How is Sourcing Alliance Different from Other Public Sector GPOs?

### 1. We Embrace the Total Cost of Ownership Philosophy

The price you pay for something doesn't equal what it actually costs you. Sourcing Alliance is an unyielding advocate for Total Cost of Ownership ("TCO") solutions. These RFP specifications are intentionally designed to reduce the total resources (in both hard and soft costs) Members expend throughout the entire life cycle of a One Card program, from procurement and acquisition to implementation, payment, and ongoing operation. This TCO approach is incorporated into the proposal scoring methodology utilized in evaluating supplier responses to this RFP (see Attachment G).

### 2. We Reject "One Size Fits All" Solutions

The typical consortium or state term contract often presents a "one size fits all" solution, reminiscent of the famous Henry Ford quote, "Any customer can have a car painted any color that he wants so long as it is black." At Sourcing Alliance, we recognize each Member is unique; the needs of a large urban university are different than a small rural school district or mid-sized suburban college. Our objective in developing this new One Card Program is to create all-encompassing RFP specifications from which Sourcing Alliance Members can configure the best solution for their institution through the already-procured, cooperative agreement that will be awarded upon the completion of this RFP process.

The net result? *Each of our members can design and deploy its One Card solution in whatever color it likes.*

### 3. Personal Service is the Cornerstone of Our Promise

Sourcing Alliance believes in the value of personal service. Members have a dedicated point of contact, with a name, direct dial, email address, and even a picture. This individual works tirelessly to help Sourcing Alliance Members manage the complexities of designing and implementing the best solutions for their organization, actively assists them with increasing efficiency within their organization, and supports their efforts to drive down their direct and indirect costs.

## Supplier Partner Perspective: How is Sourcing Alliance Different from Other Public Sector GPOs?

### 1. Pricing Flexibility

Sourcing Alliance recognizes that, in a world free of mandated standardized pricing, suppliers charge different customers differently based on the unique needs of and solution set for the customer. For example, the price you would charge a large university with economies of scale is probably different from what you might charge a small rural school district with a higher cost to service.

Our Group Purchasing Agreements include flexible pricing models that enable Supplier Partners to customize pricing based on a range of variables (scope of work, account volume, location, service levels, etc.) that affect the Supplier Partner's cost to provide products and services, and we eliminate "most favored nations" pricing requirements.

### 2. Cross-sell your Entire Product Line

A common supplier frustration is that state term contracts and one-off bid/RFP specifications often focus on a narrow solution set and do not enable a supplier to incorporate its entire product and service portfolio into the contract award. The net result is that suppliers are often prevented from cross-selling products and services they sell every day to public sector customers whose initial specifications were narrowly defined.

Sourcing Alliance's piggybackable contracts are intentionally designed to incorporate the entire scope of products and services a Supplier Partner offers to its customer base because we understand that a fundamental premise of

sales is that the easiest sale to make is through cross-selling to the customers you have won already. Why sell just one product or service at a time when you can offer public sector customers your entire portfolio?

3. *Tailor the Right Solution for Each Public Sector Customer*

The typical consortium or state term contract often presents a “one size fits all” solution. At Sourcing Alliance, we understand that suppliers want the flexibility to develop and price the best solution for each individual customer, in other words, to be free from the typical public sector group purchasing requirements that force them to offer the exact same solution to every single customer regardless of each customer’s needs and wants. Our Group Purchasing Agreements are written to empower our Supplier Partners to configure the best solution for each customer through one contract vehicle.

4. *Going to Market with Sourcing Alliance*

Sourcing Alliance’s already-procured Group Purchasing Agreements provide public sector entities nationwide with the opportunity to compliantly buy directly from Sourcing Alliance’s Supplier Partners without having to conduct a traditional stand-alone bid or RFP. At Sourcing Alliance, our commitment is to actively engage with our Supplier Partners’ senior leadership and sales organization to grow profitable public sector revenue by:

- a. **Training Supplier Partners’ sales representatives** on the customizable pricing, terms, and conditions of the Group Purchasing Agreement and how to sell their products and services using an already-procured, piggybackable contract vehicle.
- b. **Developing sales tools** that will aid in the sales process by addressing common legal and procurement questions so that your sales team can focus on selling your products and services, while our team handles customers’ legal, procurement, and compliance questions.
- c. **Creating, implementing, and managing targeted marketing campaigns** to jointly identified public sector prospects across the country. These campaigns cultivate opportunities for business attraction, retention, and growth, and set the stage for your sales representatives to initiate the sales process with public sector entities for whom the Group Purchasing Agreement is a viable solution.
- d. **Supporting the sales process** by working hand-in-hand with your sales teams throughout the sales cycle. Public sector entities frequently want to validate the legitimacy of the procurement process that established the Group Purchasing Agreement. Additionally, legal counsels often have questions regarding the legal authority of their entity to purchase from Sourcing Alliance Supplier Partners through our Group Purchasing Agreements. The Sourcing Alliance team engages with public sector prospects to respond to these types of inquiries and provide the appropriate documentation so your team can focus on designing the right solution for each Member.

## 1.5 Twofold Purpose of this RFP

YSU seeks to replace its current antiquated campus identification system, which has limited capabilities, and deploy a new One Card solution with significantly enhanced capabilities campus-wide prior to the start of the 2019-2020 academic year second semester in January 2020. Upon the successful conclusion of this RFP process and contract award to the Winning Supplier, YSU will enter into a multi-year customer agreement with the Winning Supplier.

Sourcing Alliance is adding the One Card category to our expanding portfolio of products and services. The primary goal of this Program is to offer Members a complete line of One Card capabilities that can be customized to meet the unique needs of each Member. Upon the successful conclusion of this RFP process and contract award to the Winning Supplier, Sourcing Alliance will enter into a multi-year Group Purchasing Agreement with the Winning Supplier.

Sourcing Alliance Members vary in size (from small townships to large four-year colleges and universities), location (in Ohio, in the Midwest, and across the country), type (from schools to cities to counties to universities to libraries, etc.), and number

of locations (from a single building to a campus setting to multiple buildings spread across multiple locations; the largest geographic span of any Sourcing Alliance member is statewide – there are no interstate “national accounts”).

The One Card capabilities required will vary from Member to Member. Sourcing Alliance seeks a Supplier Partner who has the demonstrated ability to meet the unique One Card requirements of current and prospective Sourcing Alliance Members nationwide and is committed to growing Program participation and overall revenue.

### 1.6 Anticipated Procurement Timetable

YSU and Sourcing Alliance (the “Issuers”) reserve the right to revise this schedule in the best interest of YSU and Sourcing Alliance and/or to comply with the State of Ohio procurement procedures and regulations and after providing reasonable notice.

May 8, 2019	YSU & Sourcing Alliance publish RFP; Email Q&A Period opens
May 22, 2019 from 9 AM to 12 PM Eastern*	Mandatory pre-proposal supplier meeting and tour of YSU campus facilities held at:  Kilcawley Center-Student Union 2068-Hynes Room 1 University Plaza Youngstown, Ohio 44555  Suppliers attending the mandatory pre-proposal meeting must RSVP to <a href="mailto:OneCard@SourcingAlliance.org">OneCard@SourcingAlliance.org</a> by 5 PM Eastern on May 21, 2019. RSVP’s should include the Respondent’s company name, contact names, titles, phone numbers, and email addresses of all attendees.
May 28, 2019 at 5 PM Eastern	Email Q&A Period for RFP clarification closes. All question should be submitted to <a href="mailto:OneCard@SourcingAlliance.org">OneCard@SourcingAlliance.org</a> . See <b>Section 1.7</b> of this RFP for additional information about the Q&A process.
June 3, 2019	The Issuers distribute the final supplier Q&A addendum to all recipients of the RFP.
June 14, 2019 at 2 PM Eastern	<b>DEADLINE FOR RESPONDENTS TO SUBMIT PROPOSALS TO YSU &amp; SOURCING ALLIANCE.</b> No public proposal opening will be held due to the complexity of responses and need for committee review. See <b>Section IV</b> of this RFP for instructions on the format and submission of proposals.  Proposals must be delivered to Sourcing Alliance to: David Robbins, Director of Product Development 6001 Cochran Road, Suite 333 Solon, Ohio 44139
July 9 & 11, 2019 between 8:30 AM and 3 PM Eastern	Reserved time period for finalists to present their proposals and respond to questions from the Proposal Review Team – invitees will be notified by 4 PM Eastern on Jun 28, 2019. Respondents should block time to be available on these dates to present to the Proposal Review Team in person at YSU.
August 1, 2019 (estimated)	YSU & Sourcing Alliance issue Letter of Intent to Award the Contract to Winning Supplier.



\* Any supplier who is not able to attend the mandatory pre-proposal supplier meeting must contact YSU and Sourcing Alliance by email at [OneCard@SourcingAlliance.org](mailto:OneCard@SourcingAlliance.org) by 4 PM Eastern on May 17, 2019 to request a waiver of the mandatory pre-proposal meeting attendance. Such communication should include a specific request for waiving the mandatory requirement of the pre-proposal meeting held on May 22, 2019 and an explanation of the reason for the waiver request. YSU and Sourcing Alliance will consider all such requests and notify suppliers of the final determination by 5 PM on May 20, 2019.

### 1.7 Email Question & Answer (Q&A) Period

Potential Respondents may submit clarifying questions regarding this RFP via email during the Q&A Period as outlined in **RFP Section 1.4 – Anticipated Procurement Timetable**. To submit a question, potential respondents must submit questions in writing to [OneCard@SourcingAlliance.org](mailto:OneCard@SourcingAlliance.org).

Questions about this RFP must be submitted to the Issuers using the above email address and must reference the relevant part of this RFP or an Attachment, the heading for the provision under question, and the page number of the RFP or the Attachment where the provision in question can be found. The potential Respondent must also include the name of a company representative, the company name, and the business phone number and the email address for the company representative. The Issuers may, at their option, disregard any questions which do not appropriately reference an RFP or Attachment provision or location, or which do not identify the originator of the question. The Issuers will not respond to any questions received after 5:00 PM on the date that the Q&A Period closes. The Issuers reserve the right to extend the deadline for suppliers to submit questions.

The Issuers responses to all questions submitted via email will be emailed to all RFP recipients on or before June 3, 2019 and posted on the Sourcing Alliance website page dedicated to this RFP for reference by all potential Respondents: [www.SourcingAlliance.org/OneCard](http://www.SourcingAlliance.org/OneCard). Clarifying questions asked and the Issuers' responses to those questions comprise the "One Card Q&A Document" for this RFP, which will constitute an Attachment to this RFP. Any interpretation or correction of the RFP will be made only by Attachment posted on [www.SourcingAlliance.org/OneCard](http://www.SourcingAlliance.org/OneCard). The Issuers will not be responsible for any other explanations or interpretations of the RFP.

Respondents' proposals are to take into account any information communicated by the Issuers in the One Card Q&A Document. **It is the responsibility of all potential suppliers to check for any updates regarding this RFP at [www.SourcingAlliance.org/OneCard](http://www.SourcingAlliance.org/OneCard).**

**IMPORTANT:** Requests from potential Respondents for copies of previous RFP's, past respondent proposals, score sheets, or contracts for this or similar past projects, are Public Records Requests ("PRR's"), and are not clarification questions regarding this RFP. PRR's submitted in accordance with directions provided in **RFP Section 1.8 - Communications Prohibited**, will be honored. The posted time frames for the Issuers' responses to email questions for RFP clarification do not apply to PRR's.

Respondents are to base their RFP responses, including the details and costs, on the requirements and performance expectations established in this One Card RFP and its Attachments, NOT on details of any current or past contract. Requirements under a current program may or may not be required by the Issuers under any future contract, and so may not be useful information for Respondents who respond to the RFP. If Respondents ask questions about existing or past YSU or Sourcing Alliance contracts, the Issuers will use their discretion in deciding whether to provide answers.

Interested suppliers should also refer to **RFP Section 1.9 - Time Frames and Funding Available**, for related information.

\* Should potential Respondents experience technical difficulties accessing either the Sourcing Alliance web page where the RFP and its related documents are published, they may contact Sourcing Alliance at 216.581.6200 for technical guidance.

## 1.8 Communications Prohibited

From the issuance date of this RFP until an actual contract is awarded to the Winning Supplier, there may be no communications concerning the RFP between any supplier that expects to submit a proposal and any employee of YSU or Sourcing Alliance or any other individual, regardless of their employment status, who is in any way involved in the development of the RFP or the selection of the Winning Supplier (“**Communications Prohibited**”). The only exceptions to the Communications Prohibited are as follows:

- A. Any communications related specifically to RFP Section 1.7 – Email Q&A Period;
- B. As necessary in any pre-existing or on-going business relationship between YSU or Sourcing Alliance and any supplier that could submit a proposal in response to this RFP;
- C. As part of any supplier interview process or proposal clarification process initiated by the Issuers, which the Issuers deem necessary;
- D. If it becomes necessary to revise any part of this RFP, the Issuers will post notice at [www.SourcingAlliance.org/OneCard](http://www.SourcingAlliance.org/OneCard);<sup>\*</sup> and
- E. Any Public Records Requests made to YSU or Sourcing Alliance.

**\* Important Note:** Attachments to the RFP or to any documents related to it will be accessible to interested suppliers through [www.SourcingAlliance.org/OneCard](http://www.SourcingAlliance.org/OneCard). The Issuers may not specifically notify any supplier of changes or announcements related to this RFP except through posting on [www.SourcingAlliance.org/OneCard](http://www.SourcingAlliance.org/OneCard). It is the affirmative responsibility of interested suppliers to be aware of and to fully respond to all updated information regarding this RFP posted at [www.SourcingAlliance.org/OneCard](http://www.SourcingAlliance.org/OneCard).

The Issuers are not responsible for the accuracy of any information regarding this RFP that was obtained or gathered through a source other than from the Issuers directly or through the Q&A process described in this RFP. Any attempts at Communications Prohibited by suppliers may result in the disqualification of those suppliers’ proposals.

## 1.9 Time Frames & Funding Available

YSU intends to contract with the Winning Supplier for a period of five (5) years beginning July 1, 2019 to June 30, 2024 with (2) two, (3) year renewals. This agreement may be renewed at any time by the mutual written consent of the parties after those renewals, unless this agreement is terminated as set forth therein. Attachment A - YSU Model Contract is included for reference.

Sourcing Alliance is seeking to contract with the Winning Supplier to provide a One Card Program as described in this RFP to Sourcing Alliance Members for an initial period of five (5) years from approximately September 1, 2019 to August 31, 2024 (“**Contract Term**”). This Group Purchasing Agreement may be renewed at any time by the mutual written consent of the parties, unless the Group Purchasing Agreement is terminated as set forth therein. Attachment A – Sourcing Alliance Model Contract is included for reference.

Through this RFP, the Issuers intend to provide interested suppliers with sufficient information to understand the scope of work which is the subject of this document, and which, when combined with the suppliers’ appropriate expertise, will enable Respondents to estimate the level of effort and resources which would be required to perform the work if awarded the YSU and Sourcing Alliance contracts. Respondents are to use this information and understanding to determine the capabilities and pricing they will offer for the performance of the work described herein.

Potential Respondents are to be aware that the Issuers may, at their sole discretion, negotiate with all technically qualifying Respondents for a revised Cost Proposal.



## SECTION II. RFP REQUIREMENTS & PRICING

### 2.1 Initial Qualifying Criteria

All Respondents must complete and provide executed originals of the following documents. The Issuers cannot consider a Respondent's proposal unless these forms are properly completed and submitted as part of the RFP response. These documents should be completed, signed in Blue Ink, and returned to the Issuers as part of the Respondent's Technical Proposal package.

- Attachment C - Required Respondent Information & Certifications
- Attachment D - Higher Education Cloud Vendor Assessment Tool
- Attachment E - W-9 Form
- Attachment E - YSU New Vendor Request Form

In addition to submitting these four properly completed and executed documents, Respondents' proposals must also meet the following Initial Qualifying Criteria. Any proposal not meeting these Initial Qualifying Criteria may be deemed nonresponsive by the Issuers:

- Was the Respondent's proposal received by the deadline as specified in RFP Section 1.6 - Anticipated Procurement Timetable?
- Did the Respondent submit a proposal comprised of a Technical Proposal and a Cost Proposal, both submitted in separate, appropriately labeled, sealed envelopes as required in RFP Section 4 - Proposal Format & Submission?
- In Attachment C - Required Supplier Information & Certifications, does the Respondent state that it is NOT excluded from entering into a contract with the Issuers due to restrictions related to the federal debarment list, unfair labor findings, or O.R.C. § 9.24?
- Did the Issuers' review of the Auditor of State website verify that the Respondent is NOT excluded from contracting with YSU and Sourcing Alliance by O.R.C. § 9.24 as the result of an unresolved finding for recovery?

### 2.2 Requirements & Proposal Specifications

The specific requirements and proposal specifications for this Program are detailed in Attachment A - Technical Proposal Requirements & Specifications. Attachment A is provided to Respondents in an editable Microsoft Word format so that it can easily serve as the base document for Respondents' Technical Proposal. The Issuers require Respondents to incorporate their Technical Proposal responses directly into this document and include referenced attachments separately. The Issuers have included the Proposal Score Sheet that will be utilized by the Proposal Review Team to score all Technical and Cost Proposals submitted as Attachment G.

### 2.3 Cost Proposal & Pricing Template

Portions of Respondents' proposals that focus on pricing or fees must be included in each Respondent's Cost Proposal. Attachment B is provided to respondents in an editable Microsoft Excel format so that it can easily serve as the base document for Respondents' Cost Proposal to provide a One Card. The Issuers have included the Proposal Score Sheet that will be utilized by the Proposal Review Team to score all Technical and Cost Proposals submitted as Attachment G.

### 2.4 Sourcing Alliance Model Contract

CCOG and Collaborant will enter into a Group Purchasing Agreement with the Winning Supplier. This Group Purchasing Agreement defines a) the terms of the relationship between CCOG, Collaborant, and the Winning Supplier, and b) the terms, conditions, and pricing of One Card products and services and related capabilities for Sourcing Alliance Members. As described in RFP Section 3.5 - Contractual Requirements, Respondents are required to review and mark-up the Sourcing

Alliance Group Purchasing Agreement template, which is included as Attachment F - YSU Model Contract, and submit that marked up Group Purchasing Agreement template as part of the Technical Proposal.

## 2.5 Youngstown State University Model Contract

YSU will enter into a contract with the Winning Supplier. The YSU model contract is included as Attachment F - YSU Model Contract.

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## SECTION III. CONDITIONS & OTHER REQUIREMENTS

In this section of the RFP, the Issuers notify Respondents seeking award of a contract of certain conditions and requirements which may affect their eligibility or willingness to participate in this procurement process, their eligibility to be awarded a contract, and requirements that will be in effect should they be awarded a contract.

### 3.1 Interview

Respondents may be requested to participate in an in-depth interview as part of the evaluation process. The Issuers reserve the right to select Respondents to interview and may not interview all Respondents. Any Respondents interviewed will bear all their costs of any scheduled interview.

### 3.2 Start Work Date

The Winning Supplier must be able to begin work with YSU no later than September 2019, the estimated date when the Customer Services Agreement between YSU and the Winning Supplier will be signed. The Winning Supplier will be notified by YSU when work may begin. **Any work with YSU begun by the Winning Supplier prior to this notification will NOT be reimbursable by YSU or Sourcing Alliance.**

The Winning Supplier must be able to begin work with Sourcing Alliance no later than September 1, 2019, the estimated date when the Group Purchasing Agreement between CCOG, Collaborant, and the Winning Supplier will be signed. The Winning Supplier will be notified by Sourcing Alliance when work may begin. **Any work with Sourcing Alliance begun by the Winning Supplier prior to this notification will NOT be reimbursable by Sourcing Alliance or YSU.**

### 3.3 Proposal Costs

Costs incurred in the preparation of this proposal are to be borne by the respondent, and the Issuers will not contribute in any way to the costs of the preparation.

### 3.4 Trade Secrets Prohibition; Public Information Disclaimer

The Issuers will consider all proposals voluntarily submitted in response to this RFP to be free of trade secrets and such proposals will, in their entirety, be made a part of the public record in compliance with Ohio Revised Code ("ORC" or "R.C.") Chapter 125.01, et seq. However, if a proposal is submitted in response to this RFP, and the proposal contains trade secret information as defined in ORC Chapter 1333.61, then such trade secret information must be clearly and conspicuously marked and/or identified as "**Trade Secret Information**" at the time that such proposal is submitted. If such trade secret information is so marked and/or identified, then the Issuers shall designate such information as trade secret information and shall maintain and keep such trade secret information in accordance with R.C. Chapter 149.43.

All proposals and any other documents submitted in response to this RFP will become the property of YSU and Sourcing Alliance. This RFP and, after the selection of the Winning Supplier, any proposals submitted in response to the RFP, except for such portions, sections, or parts of a proposal that are clearly and conspicuously marked and/or identified as trade secret information, are deemed to be public records pursuant to R.C. 149.43. For purposes of this section, "**proposal**" will mean both the Technical and the Cost Proposals (if opened by the Issuers) submitted by the Respondents, and any attachments, addenda, appendices, or sample products.

Any proposal submitted in response to this or any YSU and Sourcing Alliance RFP that fails to clearly and conspicuously mark and/or identify trade secret information at the time that such proposal is submitted to YSU and Sourcing Alliance for consideration shall be deemed and considered by YSU and Sourcing Alliance to not contain trade secret information and such proposals shall be deemed to be public records in their entirety in accordance with this **RFP Section 3.4** and R.C. 149.43.

### 3.5 Group Purchasing Agreement Requirements

- A. Any contract with the Winning Supplier resulting from the issuance of this RFP is subject to the terms and conditions as provided in the Group Purchasing Agreement template, which is included as **Attachment F** of this RFP, as amended by the mutual agreement of CCOG, Collaborent, and the Winning Supplier.
- B. Many of the terms and conditions contained in the Group Purchasing Agreement template (see **Attachment F**) are required by state and federal law; however, Respondents may propose changes to the Group Purchasing Agreement template by annotating or redlining the Group Purchasing Agreement template and returning it with the Respondent's proposal submission. Any Respondent's proposed changes are subject to CCOG and Collaborent review and approval. Any sections or terms of the Group Purchasing Agreement template that are not so annotated in its proposal response will be considered accepted by the Respondent and will not be subject to negotiation should the Respondent be awarded the contract for this RFP.
- C. Payments for any and all services provided pursuant to the Group Purchasing Agreement are contingent upon the availability of funds.
- D. All aspects of the Group Purchasing Agreement apply equally to work performed by any and all Winning Supplier subcontractors.
- E. The Winning Supplier, and any subcontractor(s), will not use or disclose any information made available to them for any purpose other than to fulfill the contractual duties specified in the RFP. The Winning Supplier, and any subcontractor(s), agrees to be bound by the same standards of confidentiality that apply to the employees and contractors of CCOG and Collaborent.

Any violation of confidentiality will constitute a breach of contract and may result in legal action.

- F. As a condition of receiving a contract award from Sourcing Alliance, the Winning Supplier, and any subcontractor(s), may be required to certify compliance with any court order for the withholding of child support which is issued pursuant to Chapter 3113.217 of the O.R.C. The Winning Supplier, and any subcontractor(s), must also agree to cooperate with Sourcing Alliance and any Ohio Child Support Enforcement Agency in ensuring that the contractor or employees of the contractor meet child support obligations established under state law.
- G. By signing a contract with Sourcing Alliance, the Winning Supplier agrees that all necessary insurance is in effect.
- H. The Winning Supplier may be required to furnish a Performance Bond or other cash surety acceptable to Sourcing Alliance in the sum and with sureties Sourcing Alliance approves and conditioned that the Winning Supplier will faithfully execute the terms of the contract and promptly make delivery of the products or services purchased by Sourcing Alliance Members.

### 3.6 Public Release of Records

Public release of any evaluation or monitoring reports funded under this Program will be made only by the Issuers. Prior to public release of such reports, the Issuers must have at least a 30-day period for review and comment.

### 3.7 Key Personnel

Sourcing Alliance may require a clause in any Group Purchasing Agreement resulting from this RFP regarding key personnel in that any person identified as critical to the success of the Program may not be removed without reasonable notice to Sourcing Alliance, and replacements will not be made without Sourcing Alliance approval.

### 3.8 Ethical & Conflict of Interest Requirements

- A. No Respondent or individual, company, or organization seeking a contract will promise or give to any YSU or Sourcing Alliance employee anything of value that is of such character as to manifest a substantial and improper influence upon the employee with respect to his or her duties;
- B. No Respondent or individual, company, or organization seeking a contract will solicit any Sourcing Alliance employee to violate any of the conduct requirements for employees;
- C. Any Respondent acting on behalf of YSU or Sourcing Alliance will refrain from activities which could result in violations of ethics and/or conflicts of interest. Any Respondent who violates the requirements and prohibitions defined herein or in Chapter 102.04 of the O.R.C. is subject to termination of the contract or refusal by YSU or Sourcing Alliance to enter into a contract; and
- D. YSU and Sourcing Alliance employees who violate O.R.C. Chapters 102.03, 102.04 2921.42 or 2921.43 may be prosecuted for criminal violations.

### 3.9 Health Insurance Portability & Accessibility Act (HIPAA) Requirements

As a condition of receiving a contract award from YSU or Sourcing Alliance, the Winning Supplier, and any subcontractor(s), may be required to comply with 42 U.S.C. Sections 1320d through 1320d-8, and to implement regulations at 45 C.F.R. Section 164.502 (e) and Sections 164.504 (e) regarding disclosure of protected health information under the Health Insurance Portability and Accountability Act (HIPAA) of 1996. Protected Health Information (PHI) is information received by the Winning Supplier from or on behalf of YSU or Sourcing Alliance that meets the definition of PHI as defined by HIPAA and the regulations promulgated by the United States Department of Health & Human Services, specifically 45 CFR164.501 and any amendments thereto.

The Winning Supplier may reasonably anticipate HIPAA language in the contract that results from this RFP, if applicable.

In the event of a material breach of Respondent obligations under this section, Sourcing Alliance may, at its option, terminate the contract according to provisions within the contract for termination.

### 3.10 Waiver of Minor Proposal Errors

The Issuers may, at their sole discretion, waive minor errors or omissions in Respondents' Technical and/or Cost Proposals when those errors do not unreasonably obscure the meaning of the content or the competitive nature of the proposal submitted in response to this RFP. However, substantial and/or substantive proposal errors that include, but are not limited to, Respondents' ability to perform, price points, costs, or other economic indicators and factors that may affect the content or competitive nature of the proposal submitted, or capacity to perform, shall not be waived, and Respondents shall not have the right to withdraw or modify their proposals after such proposal has been submitted and received and the time periods in RFP Sections 1.6, 1.7, and/or 1.8 have closed.

### 3.11 Proposal Clarifications

The Issuers reserve the right to request clarifications from Respondents to any information in their Technical and/or Cost Proposals, and may request such clarification as they deem necessary at any point in the proposal review process.

### 3.12 Unresolved Findings for Recovery (R.C. 9.24)

O.R.C. Chapter 9.24 prohibits the Issuers from awarding a contract to any entity against whom the Auditor of State has issued a finding for recovery, if such finding for recovery is “unresolved” at the time of award. By submitting a proposal, the Respondent warrants that it is not now, and will not become, subject to an “unresolved” finding for recovery under O.R.C. Chapter 9.24 prior to the award of any contract arising out of this RFP, without notifying the Issuers of such finding. The Issuers will review the Auditor of State’s website to identify each Respondent’s eligibility to enter into a contact with YSU or Sourcing Alliance prior to the evaluations of any proposal submitted pursuant to this RFP. Sourcing Alliance will not evaluate a proposal from any Respondent whose name, or the name of any of the subcontractors proposed by the Respondent, appears on the website of the Auditor of the State of Ohio as having an “unresolved” finding for recovery.

### 3.13 Mandatory Contract Performance Disclosure

Each proposal must disclose whether the Respondent’s performance and/or the performance of any of the proposed subcontractor(s), under contracts for the provision of services that are the same or similar to those to be provided for the Program which is the subject of this RFP has resulted in any “formal claims” for breach of those contracts. For purposes of this disclosure, “**formal claims**” means any claims for breach that have been filed as a lawsuit in any court, submitted for arbitration (whether voluntary or involuntary, binding or not), or assigned to mediation. If any such claims are disclosed, Respondent will fully explain the details of those claims, including the allegations regarding all alleged breaches, any written or legal action resulting from those allegations, and the results of any litigation, arbitration, or mediation regarding those claims, including terms of any settlement. While disclosure of any formal claims will not automatically disqualify a Respondent from consideration, at the sole discretion of the Issuers, such claims and a review of the background details may result in a rejection of the Respondent’s proposal. The Issuers will make this decision based on their determination of the seriousness of the claims, the potential impact that the behavior that led to the claims could have on the supplier’s performance of the work, and the best interests of the Issuers and Sourcing Alliance Members.

### 3.14 Mandatory Disclosures of Governmental Investigations

Each proposal must indicate whether the Respondent and/or any of the proposed subcontractor(s) has been the subject of any adverse regulatory or adverse administrative governmental action (federal, state, or local) with respect to Respondent’s performance of services similar to those described in this RFP. If any such instances are disclosed, Respondent must fully explain, in detail, the nature of the governmental action, the allegations that led to the governmental action, and the results of the governmental action including any legal action that was taken against supplier by the governmental agency. While disclosure of any governmental action in response to this section will not automatically disqualify a Respondent from consideration, such governmental action and a review of the background details may result in a rejection of the Respondent’s proposal at the sole discretion of the Issuers. The decision by the Issuers on this issue will be based on a determination of the seriousness of the matter, the matter’s potential impact on the supplier’s performance of the work, and the best interests of the Issuers and Sourcing Alliance Members.



## SECTION IV. PROPOSAL FORMAT & SUBMISSION

### 4.1 Proposal Submission Information

YSU and Sourcing Alliance require proposal submissions in both paper and electronic format. The proposal must be prepared and submitted in accordance with instructions found in this **Section 4**. The proposal submission must be comprised of:

- **two signed original** paper copies in a separate, sealed envelope/package and one electronic copy (either on CD-ROM or on USB jump drive) copy of the Technical Proposal; **AND**
- in a sealed, separate envelope, **two signed originals** paper copies and one electronic copy (either on CD-ROM or on USB jump drive) copy of the Cost Proposal.

Each supplier's total proposal submissions (both the Technical and Cost Proposals in each required copy) must be received by Sourcing Alliance no later than **2:00 PM on June 14**. Faxes or emailed submissions will not be accepted.

Technical Proposals must be clearly marked: **"TECHNICAL PROPOSAL ENCLOSED FOR YSU & SOURCING ALLIANCE REQUEST FOR PROPOSALS: ONE CARD PROGRAM SUBMITTED BY [RESPONDENT'S NAME HERE]"** and addressed to:

YSU & SOURCING ALLIANCE  
Attn: David Robbins  
Director of Product Development  
6001 Cochran Road, Suite 333  
Solon, Ohio 44139

Respondent's original Technical and Cost Proposals must contain all the information and documents specified in **RFP Section 4.2 - Format for Organization of the Proposal**. All copies (both paper and electronic) of the Technical Proposal must include copies of ALL information, documents, and pages in the original proposal.

Along with the Technical Proposal, Respondent must submit the Cost Proposal in a separate, sealed envelope/package labeled: **"NOTE: DO NOT OPEN. COST PROPOSAL ENCLOSED FOR YSU & SOURCING ALLIANCE REQUEST FOR PROPOSALS: ONE CARD PROGRAM SUBMITTED BY [RESPONDENT'S NAME HERE]."**

The electronic copy of the Technical Proposal must include all components of the technical response, including any required or voluntary attachments to it, and should be submitted in the envelope containing the paper original of the Technical Proposal.

The electronic copy of the Cost Proposal must include all cost response components, including any required or voluntary attachments, and should be submitted in the envelope containing the paper original of the Cost Proposal.

The electronic copies of both the Technical and Cost Proposals must be labeled with the Respondent's name, the RFP number (2019.1), and the proposal submission date or proposal due-date, at minimum. The requested electronic copies will be used by the Issuers for archiving purposes and for fulfillment of Public Records Requests, and failure to include them or to properly label them may, at the Issuers' sole discretion, result in the rejection of the Respondent from any consideration.

All proposal submissions must be received, complete, at the above address, via U.S. Mail, overnight shipping, or hand delivery by the above date and time. Materials received after the date and time as stated above will not be included in any previous submissions, nor will they be considered, unless such materials are specifically requested by the Issuers. The Issuers are not responsible for proposals incorrectly addressed or for proposals delivered to any location other than the address specified above. No confirmation of receipt of mailed proposals will be provided.

All proposals will be valid for a period of ninety (90) days from the date the proposals are received by the Issuers. A respondent seeking to withdraw its proposal from consideration may submit such request directly to YSU and Sourcing Alliance.

#### 4.2 Format for Organization of the Proposal

##### A. Technical Proposal Organization

The Proposal Score Sheet that will be utilized by the proposal review team to score each Technical Proposal is provided as **Attachment G**. Respondents are strongly encouraged to utilize the Proposal Score Sheet to check their proposals for quality, compliance, and completeness prior to submission.

Respondent's Technical Proposal must contain the following components (organized in four (4) primary tabs and divided into sub-tabs) as described below. Any other information thought to be relevant, but not applicable to a specific RFP section number/letter must be provided as an appendix to the proposal and so marked as an additional sub-tab of **Tab 4**. The Issuers reserve the right not to review submitted appendices which includes information/materials not required in the RFP. All pages in **Tab 3** must be sequentially numbered.

Suppliers must organize their Technical Proposals in the following order:

Tab 1	Required Respondent Information and Certifications Document ( <b>Attachment C</b> ), Higher Education Cloud Vendor Assessment Tool ( <b>Attachment D</b> ), Request for Taxpayer Identification Number (W-9) Form ( <b>Attachment E</b> ), and YSU New Vendor Request Form ( <b>Attachment E</b> ), each fully completed and executed.
Tab 2	Sourcing Alliance Group Purchasing Agreement template (see <b>RFP Section 3.5 - Contractual Requirements</b> ) as annotated or redlined.
Tab 3	Technical Proposal Requirements & Specifications
	Sub-Tab 3a. Respondent Overview & Qualifications ( <b>Attachment A - Section 3</b> )
	Sub-Tab 3b. Product/System Features & Functionality ( <b>Attachment A - Section 4</b> )
	Sub-Tab 3c. Cards & Card Production ( <b>Attachment A - Section 5</b> )
	Sub-Tab 3d. Access Control Systems ( <b>Attachment A - Section 6</b> )
	Sub-Tab 3e. Point-of-Sale Hardware & Terminals ( <b>Attachment A - Section 7</b> )
	Sub-Tab 3f. Integration & Functionality ( <b>Attachment A - Section 8</b> )
	Sub-Tab 3g. Environment & Availability ( <b>Attachment A - Section 9</b> )
	Sub-Tab 3h. Implementation & Ongoing Support ( <b>Attachment A - Section 10</b> )
	Sub-Tab 3i. Additional System Features & Other Offerings ( <b>Attachment A - Section 11</b> )
	Sub-Tab 3j. Partnering with Sourcing Alliance ( <b>Attachment A - Section 12</b> )
Tab 4	Appendix/Appendices (for referenced attachments, sample reports, etc.)

##### B. Technical Proposal Details

Respondent's Technical Proposal must contain the following components, at minimum. It is mandatory that proposals be organized in the order described in this **RFP Section 4.2 – Format for Organization of the Proposal** and that, wherever appropriate, sections/portions of the proposal make reference by section number/letter to those RFP requirements to which they correspond.

**IMPORTANT:** Any Technical Proposals found to contain any prohibited cost information may be disqualified from consideration. Prohibited cost information is defined as any dollar amounts which the Issuers might find indicative of



the relative cost or economy of the proposal. However, information on the assets, value, or historical business volume of the Respondent is NOT considered to be such prohibited cost information, and MAY be included in any Respondent's Technical Proposal as information on business capacity and stability. Any prohibited cost information must be submitted with the separate, sealed Cost Proposal. The Technical Proposal is defined as any part of the Respondent's proposal (either as required by the Issuers or included at the Respondent's discretion, such as work plan, resumes, letters of recommendation, letters of cooperation from any subcontractors, etc.) which is not specifically identified by the Issuers as a required component of the separate, sealed Cost Proposal. Should a Respondent determine it is important to include any documents containing such prohibited cost information in the Technical Proposal, the cost information in those documents must be made unreadable by the Respondent before submission of the proposal. Failure to follow these instructions may result in a determination that Respondent's proposal is nonresponsive to this RFP pursuant to O.R.C. § 9.321.

**C. Cost Proposal Organization**

Respondents should provide their Cost Proposal response in a separate Cost Proposal document (**Attachment B**).

Respondent's hard copy Cost Proposal must contain the following components (organized in five primary tabs) as described below. Any other information thought to be relevant, but not applicable to a specific RFP section number/letter must be provided as an appendix to the Cost Proposal and so marked as an additional sub-tab of **Tab 3**. The Issuers reserve the right not to review submitted appendices which include information/materials not required in the RFP. All pages in each tab will be sequentially numbered.

Suppliers must organize their Cost Proposals in the following order:

Tab 1	System & Functionality
Tab 2	Cards & Card Production
Tab 3	Access Control
Tab 4	Point-of-Sale
Tab 5	Additional System Features & Other Offerings
Tab 6	Appendix/Appendices

**D. Cost Proposal Details**

The Cost Proposal must clearly state the specific pricing or pricing structure that supplier will utilize to charge Sourcing Alliance Members for One Card capabilities purchased. The Cost Proposal must include a statement that the prices quoted are firm or provide a clearly defined methodology for making price adjustments during the term of the contract. Sourcing Alliance seeks flexibility in pricing models to enable individual Members to receive One Card pricing customized to meet their specific requirements; suppliers should address flexibility and customization capabilities in their Cost Proposal. Suppliers are to provide a complete, written cost proposal, and submit it as the separate sealed Cost Proposal.

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## SECTION V. CRITERIA FOR PROPOSAL EVALUATION & SELECTION

### 5.1 Scoring of Proposals

The Issuers will contract with the Respondent that best demonstrates the ability to meet the requirements specified in this RFP. Proposals will be evaluated based on the capacity and experience demonstrated in Respondent's Technical and Cost Proposals. Proposal scoring will be weighted as described in **Attachment G - Proposal Score Sheet**. All proposals will be reviewed and scored by a Proposal Review Team (the "PRT"), comprised of YSU and Sourcing Alliance team members. Respondents should not assume that the PRT members are familiar with any current or past work activities of the Respondent with YSU or Sourcing Alliance. Proposals containing assumptions, lack of sufficient detail, poor organization, lack of proofreading, and unnecessary use of self-promotional claims will be evaluated accordingly.

Selection of the Winning Supplier will be based upon the criteria specified in the Technical and Cost Proposals. Any proposals not meeting the requirements contained in those sections of this RFP will not be scored or may be held pending receipt of required clarifications. The PRT reserves the right to reject any and all proposals, in whole or in part, received in response to this RFP. The review team may waive minor defects that are not material, do not affect the competitive nature of the proposal, and when no prejudice will result to the rights of any supplier or to the public. In scoring the proposals, the Issuers will score in three phases:

#### A. Phase I Review – Initial Qualifying Criteria:

All respondents must complete and provide executed originals of the following documents. The Issuers cannot consider a respondent's proposal unless these forms are properly completed and submitted as part of the RFP response. These documents should be completed, signed in Blue Ink, and returned to YSU and Sourcing Alliance as part of the supplier's Technical Proposal package.

- **Attachment C - Required Respondent Information & Certifications**
- **Attachment D - Higher Education Cloud Vendor Assessment Tool**
- **Attachment E - W-9 Form**
- **Attachment E - YSU New Vendor Request Form**

In addition to submitting these four properly completed and executed documents, Respondent's proposals must also meet the following Initial Qualifying Criteria. Any proposal not meeting these Initial Qualifying Criteria may be deemed nonresponsive by the Issuers:

- Was the Respondent's proposal received by the deadline as specified in **RFP Section 1.6 - Anticipated Procurement Timetable?**
- Did the Respondent submit a proposal comprised of a Technical Proposal and a Cost Proposal, both submitted in separate, appropriately labeled, sealed envelopes as required in **RFP Section 4 - Proposal Format & Submission?**
- In **Attachment C - Required Supplier Information & Certifications**, does the Respondent state that it is NOT excluded from entering into a contract with the Issuers due to restrictions related to the federal debarment list, unfair labor findings, or O.R.C. § 9.24?
- Did the Issuers' review of the Auditor of State website verify that the Respondent is NOT excluded from contracting with YSU and Sourcing Alliance by O.R.C. § 9.24 as the result of an unresolved finding for recovery?

In order to be fully reviewed and scored, proposals submitted must pass the following Phase I Review. **Any "no" for the listed Phase I criteria will eliminate a proposal from further consideration.**

**B. Phase II Review – Criteria for Scoring the Technical Proposal:**

The PRT will then score those Technical Proposals not eliminated in Phase I Review by assessing how well the Respondent meets the requirements as specified in **Attachment A** of this RFP. Using the Proposal Score Sheet for Phase II scoring (see **Attachment G** of this RFP for specific evaluation criteria), the PRT will read, review, discuss, and reach consensus on the final technical score for each qualifying Technical Proposal.

A maximum of **200** points will be awarded for the Technical Proposal, weighted as shown in **Appendix G**. A Technical Proposal must achieve a total of at least **100** points (a score which represents that the Respondent can successfully perform the resulting contractual duties) out of the possible **200** points to qualify for continued consideration. Any Technical Proposal which does not meet the minimum required Technical Proposal point threshold will be determined nonresponsive to this RFP and the associated Cost Proposal will neither be opened nor considered.

All Phase II Technical Proposal evaluation criteria will be scored according to the following scale, based on the proposal's ability to meet YSU and Sourcing Alliance's needs. The Technical Proposal Score Sheet (see **Attachment G**) uses the following scoring values for rating each requirement.

0%	20%	50%	100%
Does Not Meet Requirement	Partially Meets Requirement	Meets Requirement	Exceeds Requirement

Technical Performance Scoring Definitions:

**“Does Not Meet Requirement”** – A particular RFP requirement was not addressed in the supplier’s proposal. **Score = 0%** times the weighted value for that criterion.

**“Partially Meets Requirement”** – Respondent’s proposal demonstrates some attempt at meeting a particular RFP requirement, but that attempt falls below acceptable levels. **Score = 20% times the weighted value for that criterion.**

**“Meets Requirement”** – Respondent’s proposal fulfills a particular RFP requirement in all material respects, potentially with only minor, non-substantial deviation. **Score = 50% times the weighted value for that criterion.**

**“Exceeds Requirement”** – Respondent’s proposal fulfills a particular RFP requirement in all material respects and offers some additional level of quality in excess of the Issuers’ expectations or requirements. **Score = 100% times the weighted value for that criterion**

**IMPORTANT:** Before submitting a proposal in response to this RFP, Respondents are strongly encouraged to use the Proposal Score Sheet (**Attachment G**) and the above technical performance scoring information to review their proposals for completeness, compliance, and quality.

All Respondents whose Technical Proposals met the minimum scoring threshold will proceed to the next level of review, which is consideration of the Cost Proposal.

**C. Phase III Review – Criteria for Considering the Cost Proposal**

The Issuers will review Cost Proposals to determine the best overall financial value for i) YSU, ii) Sourcing Alliance Members, and iii) Sourcing Alliance. The Issuers will take into account pricing for One Card capabilities any costs or charges associated with service and support, reporting, and additional services proposed. There is a maximum of 100 points available in the evaluation of Cost Proposals.

#### D. Final Scoring

The total of each Respondent's Technical Proposal and Cost Proposal will be added together to calculate the final points awarded to each Respondent. The Issuers will award the contract to the lowest responsive and responsible bidder in accordance with applicable public sector procurement guidelines.

The Issuers may, at their sole discretion, negotiate with all technically qualifying suppliers for revised Cost Proposals.

#### 5.2 Review Process Caveats

Negligence on the part of a Respondent in preparing its proposal submitted in response to this RFP confers no right of modification or withdrawal of the Respondent's proposal after such proposal has been received and the time periods identified in Sections 1.6, 1.7, and/or 1.8 have closed.

Should the Issuers interview Respondents prior to making a final selection, results to interview questions will be scored in a manner similar to the process described in RFP Section 5.1 - Scoring of Proposals, above. Such scored results may be either added to those Respondent's proposal scores, or will replace certain scores, at the discretion of the PRT. The standards for scoring the interviews and the method used for considering the results of the interviews will be applied consistently for all Respondents participating in the interview process for this RFP. Such communications are not violations of any Communications Prohibition in RFP Section 1.8 - Communications Prohibited of this RFP, and are expressly permitted when initiated by the Issuers, but are conducted at the sole discretion of the Issuers.

The Issuers reserve the right to negotiate with Respondents for adjustments to their proposals should the Issuers determine, for any reason, to adjust the scope of the Program for which this RFP is released. Such communications are not violations of any Communication Prohibitions in Section 1.8 - Communications Prohibited of this RFP, and are expressly permitted when initiated by the Issuers, but are initiated at the sole discretion of the Issuers. Any Respondent deemed not responsible, or any Respondent submitting a proposal deemed not to be responsive to the terms of this RFP as those terms are defined in Ohio Revised Code § 9.321, will not be awarded the contract.

#### 5.3 Final Supplier Recommendation

The PRT will recommend to the Issuers the technically qualified supplier offering the proposal most advantageous to YSU and Sourcing Alliance Members, taking into consideration factors such as price and the evaluation of criteria in the Technical Proposal.

#### 5.4 Tie Breaker

In the event that two or more of the proposals have a score which is tied after final calculation of both the Technical Proposal and the Cost Proposal, the proposal with the higher score in the Technical Proposal will prevail.

***[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK]***

## SECTION VI. RFP PROTEST PROCEDURE

### 6.1 Protests

Any potential, or actual, supplier objecting to the award of a contract resulting from the issuance of this RFP may file a protest of the award of the contract, or any other matter relating to the process of soliciting the proposals. Such a protest must comply with the following guidelines:

- A. A protest may be filed by a prospective or actual Respondent objecting to the award of a contract resulting from this RFP. The protest must be filed in writing and must contain the following information:
- The name, address, and telephone number of the protestor;
  - The name and number of the RFP being protested;
  - A detailed statement of the legal and factual grounds for the protest, including copies of any relevant documents;
  - A request for a ruling by the Issuers;
  - A statement as to the form of relief requested from the Issuers; and
  - Any other information the protestor believes to be essential to the determination of the factual and legal questions at issue in the written protest.
- B. A timely protest will be considered by the Issuers, if it is received by the Issuers within the following periods:
- A protest based on alleged improprieties in the issuance of the RFP or any other event preceding the closing date for receipt of proposals which are apparent or should be apparent prior to the closing date for receipt of proposals will be filed no later than 12:00 PM on the closing date for receipt of proposals, as specified in **RFP Section 1.6 - Anticipated Procurement Timetable**, of this RFP.
  - If the protest relates to the announced intent to award a contract, the protest will be filed no later than 12:00 PM Eastern of the eighth (8th) calendar day after the issuance of the Letter of Intent to Award Contract.
  - An untimely protest may be considered by the Issuers if the Issuers determine that the protest raises issues significant to the organization's procurement system. An untimely protest is one received by the Issuers after the time periods set forth in **Item B** of this section.
  - All protests must be filed at the following location:  
Sourcing Alliance  
Attn: General Counsel  
6001 Cochran Road, Suite 333  
Cleveland, Ohio 44139
  - When a timely protest is filed, a contract award will not proceed until a decision on the protest is issued or the matter is otherwise resolved, unless the Issuers determine that a delay will severely disadvantage YSU, Sourcing Alliance Members, or Sourcing Alliance. The Respondent(s) who would have been awarded the contract will be notified of the receipt of the protest.
  - The Issuers will issue written decisions on all timely protests and will notify any Respondent who filed an untimely protest as to whether or not the protest will be considered.

### 6.2 Caveats

The Issuers are under no obligation to issue a contract as a result of this solicitation if, in the opinion of the Issuers and the PRT, none of the proposals are sufficiently responsive to the objectives and needs of YSU, Sourcing Alliance Members, or Sourcing Alliance. The Issuers reserve the right to not select any Respondent should the Issuers decide not to proceed for any reason. The Issuers reserve the right to select multiple Respondents for contract award.

## SECTION VII. ATTACHMENTS & THEIR USES

### 7.1 Attachment A - Technical Proposal Requirements & Specifications

The technical proposal requirements and specifications serve as the basis of the RFP. This document is provided in an editable Microsoft Word form so that respondents can utilize this document as the basis of their Technical Proposal.

### 7.2 Attachment A - YSU Point of Sale Map

A detailed breakdown of YSU's existing point-of-sale ("POS") terminals and their locations. These POS terminals will be replaced by the Winning Supplier as part of the YSU scope of work. Respondents may propose replacing these POS terminals in their current number and configuration or propose a different POS terminal configuration.

### 7.3 Attachment B - Cost Proposal

An Excel file for Respondents to utilize as the basis of their Cost Proposal. Respondents should include pricing for the other systems functionality and other offerings included in the response to Section 11 of Attachment A - Technical Proposal Requirements & Specifications.

### 7.4 Attachment C - Required Respondent Information & Certifications

To be completed, and the original – signed in Blue Ink – to be returned in **Tab 1** of Respondent's Technical Proposal.

### 7.5 Attachment D - Higher Education Cloud Vendor Assessment Tool

To be completed and returned in **Tab 1** of Respondent's Technical Proposal.

### 7.6 Attachment E - W-9 Form

To be completed, and the original – signed in Blue Ink – to be returned in **Tab 1** of Respondent's Technical Proposal.

### 7.7 Attachment E - YSU New Vendor Request Form

To be completed and returned in **Tab 1** of Respondent's Technical Proposal.

### 7.8 Attachment F - Sourcing Alliance Group Purchasing Agreement Template

Provided for Respondent review. This agreement template will serve as the basis of the piggybackable group purchasing agreement established between Sourcing Alliance and the Winning Supplier. Respondents are required, as part of Attachment C - Required Respondent Information & Certifications to either confirm they accept the terms included in the agreement template as is or provide a redlined/annotated copy as part of Respondent's proposal in **Tab 2** of Respondent's Technical Proposal indicating the specific changes the Respondent is requesting should Respondent be selected as the Winning Supplier.

### 7.9 Attachment F - YSU Model Contract

Provided for Respondent review. This agreement template will serve as the basis of the contract between YSU and the Winning Supplier.

### 7.10 Attachment G - Proposal Score Sheet

For Respondent reference only – this document is the score sheet the Proposal Review Team will utilize to evaluate all proposals submitted in response to the RFP. Respondents are strongly encouraged to use the score sheet to evaluate their Technical Proposals prior to submission to the Issuers.



## ATTACHMENT A

### SOURCING ALLIANCE ONE CARD RFP #2019.1

### REQUIREMENTS & PROPOSAL SPECIFICATIONS

### Table of Contents

Section 1.	Initial Qualifying Criteria.....	1
1.1.	Completing & Submitting Initial Qualifying Criteria.....	1
Section 2.	General Guidelines.....	2
2.1.	Instructions for Completing Attachment A.....	2
2.2.	Trade Secrets .....	2
2.3.	Attachments.....	2
Section 3.	Respondent Overview & Qualifications .....	3
3.1.	Company Information.....	3
3.2.	General Qualifications.....	4
3.3.	Mandatory Contract Performance Disclosure .....	5
3.4.	Mandatory Disclosure of Governmental Investigations.....	5
3.5.	Customer References .....	6
3.6.	Insurance Coverage.....	6
3.7.	Contracting for Services.....	7
Section 4.	Product/System Features & Functionality.....	8
4.1.	System User Interface (Administrators) .....	8
4.2.	Online Account Management.....	11
4.3.	System User Interface (Patrons).....	13
4.4.	Reporting .....	15
Section 5.	Cards & Card Production Specifications.....	17
5.1.	Cards & Card Production.....	17
Section 6.	Access Control Systems.....	21
6.1.	System User Interface (Administrators) .....	21
6.2.	Access Control Card Readers .....	23
6.3.	Access Control Software.....	26
6.4.	Wireless Access Control System .....	28
6.5.	Biometric Access Control System.....	28
6.6.	Offline Access Control System .....	28
Section 7.	Point-of-Sale (POS) Hardware & Terminals.....	30
7.1.	Point-of-Sale (POS) Hardware.....	30
7.2.	Terminal(s).....	32





7.3. Small Retail and Activity Terminal ..... 33

Section 8. Integration & Functionality ..... 35

8.1. Interfaces ..... 35

8.2. Attendance Tracking - Events ..... 37

8.3. Attendance Tracking - Classroom ..... 38

8.4. Dining/M meal Plans ..... 39

8.5. Equipment Checkout ..... 41

8.6. Laundry Reservation ..... 42

8.7. Off-Campus Vending ..... 42

8.8. Online Web-Based Ordering System ..... 43

8.9. Parking & Transit ..... 44

8.10. Vending & Copier Controllers ..... 45

Section 9. Environment & Availability ..... 46

9.1. Hosting ..... 46

9.2. Visitor Registration ..... 49

9.3. Host System Architecture ..... 50

9.4. Security ..... 51

Section 10. Implementation & Ongoing Support ..... 53

10.1. Methodology & Personnel ..... 53

10.2. Customer Support ..... 54

10.3. Local Hardware Support ..... 56

10.4. User Group ..... 56

Section 11. Additional System Features & Other Offerings ..... 58

11.1. Other System Offerings ..... 58

11.2. Other Offerings ..... 58

Section 12. Partnering with Sourcing Alliance ..... 59

12.1. Respondent Organizational Structure & Staffing of Sourcing Alliance Relationship ..... 59

12.2. Sourcing Alliance Administrative Fee & Reporting ..... 60

## Section 1. Initial Qualifying Criteria

### 1.1. Completing & Submitting Initial Qualifying Criteria

As described in RFP Section 5 – Criteria for Proposal Evaluation & Selection, Respondent must complete and provide executed originals of the following documents as part of the proposal Respondent submits. The Issuers (Youngstown State University and Sourcing Alliance) will not consider Respondent's Technical and Cost Proposals unless these forms are properly completed and submitted as part of the RFP response.

1.1.1.	<b><u>Attachment C - Required Respondent Information &amp; Certifications.</u></b> This document includes information about Respondent, key points of contact for proposal and legal questions that may arise during the Issuers' review of the response, minority business enterprise and certifications, required affirmations subject to Ohio Revised Code guidelines, equal employment opportunity questions, questions regarding the subcontracting of certain elements of Respondent's service delivery to Youngstown State University and Sourcing Alliance Members, and confirmation that Respondent has reviewed and annotated, if applicable, the Sourcing Alliance model Master Agreement entered into with Winning Suppliers.
Click here to enter response confirming <b><u>Attachment C</u></b> is complete and provide additional commentary, if necessary.	
1.1.2.	<b><u>Attachment D - Higher Education Cloud Vendor Assessment Tool.</u></b> The HECVAT was created by the Educause Higher Education Information Security Council Shared Assessments Working Group. Its purpose is to provide a starting point for the assessment of third-party provided cloud services and resources.
Click here to enter response confirming <b><u>Attachment D</u></b> is complete and provide additional commentary, if necessary.	
1.1.3.	<b><u>Attachment E - W-9 Form and YSU New Vendor Request Form.</u></b> There are two documents that comprise <b><u>Attachment E</u></b> : the IRS W-9 Form and Youngstown State University's New Vendor Request Form. Respondent should complete both forms and include them in its response.
Click here to enter response confirming both <b><u>Attachment E</u></b> forms are complete and provide additional commentary, if necessary.	

## Section 2. General Guidelines

### 2.1. Instructions for Completing Attachment A

The specific requirements and proposal specifications for this Program are detailed in this [Attachment A - Technical Proposal \(Requirements & Proposal Specifications\)](#). Attachment A is provided to Respondent in an editable Microsoft Word form so that it can easily serve as the base document for Respondent's Technical Proposal. Respondent should incorporate its Technical Proposal responses directly into this document and include referenced attachments separately. The Issuers have included the Proposal Score Sheet as Attachment G that will be utilized by the proposal review team to score all Technical and Cost Proposals submitted for reference by Respondent.

For sections of Attachment A structured like the example below, simply click in the green cell on the "Click here to enter response" text and either type in or paste (using the Paste Special > Merge Formatting function) your response.

2.1.1.	<i>Describe how your System's Administrator interface is used to manage the System.</i>
Click here to enter response.	

For sections of Attachment A structured like the example below, click on the "Yes" checkbox if your solution fully provides the defined requirement. Click on the "No" checkbox if your solution does not provide or only provides part of the defined requirement. The green cell is included for Respondent to include any additional information or capabilities relating to that defined requirement. For example, if your solution i) provides more capabilities around that requirement, ii) meets some, but not all of that requirement, or iii) does not meet the defined requirement, but provides an alternative solution for the Proposal Review Team's consideration, click in the green cell on the "Click here to provide additional commentary, if necessary." text and either type in or paste (using the Paste Special > Merge Formatting function) clarifying or additional information as appropriate.

2.1.1.1.	Allows for creating, editing, and deleting System Administrators.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		

### 2.2. Trade Secrets

Respondent is encouraged to review [RFP Section 3.4 - Trade Secrets Prohibition; Public Information Disclaimer](#) in conjunction with developing its response to this RFP. Any information provided by Respondent in its proposals that is not marked as trade secret information shall be deemed to be public records in accordance with Ohio law. Be sure

### 2.3. Attachments

Respondent may incorporate additional documents by reference as part of its response to [Attachment A - Technical Proposal \(Requirements & Proposal Specifications\)](#). For example, Respondent may want to include brochures, technical specifications, System screen shots, or sample reports in response to specific questions included in this Attachment A. Respondent should clearly state in its response to questions in this Attachment A whether any specific documents are incorporate in that response by reference. Hard copies of any such referenced document should be included in the appropriate section of the printed Technical Proposal response in accordance with the instructions in [RFP Section 4.2 - Format for Organization of the Proposal](#).

The file names of such referenced documents that are included in respondent's electronic Technical Proposal submissions should include, in the following order: i) the Section Number of the question for which the file is included as part of the response, ii) Respondent's name, and iii) a brief description of what is included in the electronic file. For example, if Respondent references an attachment that includes a .pdf with a list of standard reports in response to [Section 4.4.1.](#), the following electronic file name would be appropriate: *Section 2.4.1 - Respondent Name - Standard Reports.pdf*.



## Section 3. Respondent Overview & Qualifications

### 3.1. Company Information

<b>3.1.1.</b>	<i>Company Name &amp; Address.</i>	
Company Name:	Click here to enter response.	
Street Address:	Click here to enter response.	
City, State & Zip Code:	Click here to enter response.	
Main Telephone Number:	Click here to enter response.	
Website:	Click here to enter response.	
<b>3.1.2.</b>	<i>Formation.</i> In what year was the company formed? For how long has your company been operating under its present business name? If your company has changed its business name, include the most recent prior business name and the year of the name change.	
dfdddf		
<b>3.1.3.</b>	<i>Legal Structure.</i> Check the box next to the option that best describes the company's legal structure. Include requested narrative in the space provided.	
&	Corporation – provide the State of incorporation and the company ownership structure.	Click here to enter response.
&	Partnership – provide the State of registration and the names of all partners.	Click here to enter response.
&	Sole Proprietorship – provide the State of registration and the names and titles of all principals.	Click here to enter response.
&	Joint Venture – provide the State of registration and the names and titles of all principals.	Click here to enter response.
&	Other – provide detailed description of corporate structure and ownership.	Click here to enter response.
<b>3.1.4.</b>	<i>Financial Strength.</i> Provide three (3) years of company and any parent company financial statements or other documents that speak to the financial strength of the company, such as the most recent Annual Report to Shareholders and 10K Report (if applicable) or audited financial statements, including income statement and balance sheet. <i>Note: you may mark this information as a "Trade Secret" per the terms of <u>RFP Section 5 – Criteria for Proposal Evaluation &amp; Selection</u> and provide your response to this question in a separate, sealed envelope marked on the exterior as "Financial Statements."</i> Any financial information so provided should be included as part of the Technical Proposal.	
Click here to enter response.		
<b>3.1.5.</b>	<i>Bankruptcy &amp; Insolvency.</i> Describe any bankruptcy or insolvency for your organization (or its predecessors, if any) or any principal of the firm in the last three (3) years.	
Click here to enter response.		



<b>3.1.6.</b>	<b>Litigation.</b> Describe any litigation in which your company has been involved in the last three (3) years and the status of that litigation.
<a href="#">Click here to enter response.</a>	

### 3.2. General Qualifications

<b>3.2.1.</b>	<b>Industry Experience.</b> For how long has your company been in the One Card system and/or related products and services industry? What percentage of your company's revenue in each of the last three (3) full calendar years was generated from the provision of One Card system and/or related products and services?
<a href="#">Click here to enter response.</a>	

<b>3.2.2.</b>	<b>Geographic Reach.</b> Describe your company's service area in the United States (e.g., nationwide, the continental United States, or specific states or regions). If your company does not currently provide services nationwide, describe your plans/timeframes to achieve nationwide service provision, if applicable.
<a href="#">Click here to enter response.</a>	

<b>3.2.3.</b>	<b>Certifications.</b> Describe any relevant certifications held by your company. When did your company initial obtain these certifications? Has your company maintained these certifications on an ongoing basis? If not, when and why did your company lose any referenced certifications?
<a href="#">Click here to enter response.</a>	

<b>3.2.4.</b>	<b>Awards.</b> Describe any relevant awards received by your company for its products, services, innovation, and/or operations. Include information about the issuing organization and the year the award was issued to your company.
<a href="#">Click here to enter response.</a>	

<b>3.2.5.</b>	<b>Public Sector Contract Vehicles.</b> What Public Sector contract vehicles (e.g., state term contracts, General Services Administration schedules, group purchasing organization contracts, etc.) does your company have in place to provide One Card Systems and/or related products and services to public sector entities under an exemption from the standard public sector bid/RFP process? For each contract vehicle, when was the contract established, what is the expiration date, and is the award sole source or multi-source (i.e., is your company the only supplier for the spending category or are multiple competing suppliers included in the contract vehicle)?
<a href="#">Click here to enter response.</a>	

<b>3.2.6.</b>	<b>Public Sector Strategic Growth Plan.</b> Describe your company's three to five-year local government, K-12, and higher education sales objectives and the key elements of your strategic plan to achieve those objectives. What is the total annual dollar value of your company's revenue that is generated by sales to local governments and educational institutions today? What percentage of your company's total annual revenue is generated by sales to local governments and educational institutions?
<a href="#">Click here to enter response.</a>	



<b>3.2.7.</b>	<p><b>Extension to Inter-University Council Purchasing Group (IUC-PG).</b> Please advise if your company has an interest in extending your offer to the Inter-University Council of Ohio's Purchasing Group (IUC-PG) membership. This is a courtesy request and there is no obligation to agree to it. It is not part of the University's selection criteria. Should you choose to extend usage, participation in the contract by other IUC-PG members is strictly voluntary on their part, and the University's sole role and responsibility would be to share the contents of the contract with them. In no way must any decision by your company to extend the contract to the IUC-PG members negatively affect the delivery capability, general service level, prices, discounts, product availability, or other contractual obligations to the University.</p> <p>Please indicate in your response package if your company agrees to extend any resulting contracts to include other IUC-PG members who may have an interest in utilizing it and describe any regional or geographic limitations.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to enter response.</a>		

### 3.3. Mandatory Contract Performance Disclosure

<b>3.3.1.</b>	<p>Pursuant to <b>RFP Section 3.13</b>, disclose whether the your company's performance and/or the performance of any of the proposed subcontractor(s) under contracts for the provision of services that are the same or similar to those to be provided for the Program which is the subject of this RFP has resulted in any "formal claims" for breach of those contracts. For purposes of this disclosure, "formal claims" means any claims for breach that have been filed as a lawsuit in any court, submitted for arbitration (whether voluntary or involuntary, binding or not), or assigned to mediation. For any such claims are disclosed, fully explain the details of those claims, including the allegations regarding all alleged breaches, any written or legal action resulting from those allegations, and the results of any litigation, arbitration, or mediation regarding those claims, including terms of any settlement. While disclosure of any formal claims will not automatically disqualify Respondent from consideration, at the sole discretion of the Issuers, such claims and a review of the background details may result in a rejection of Respondent's proposal. The Issuers will make this decision based on their determination of the seriousness of the claims, the potential impact that the behavior that led to the claims could have on Respondent's performance of the work, and the best interests of the Issuers.</p>	
<a href="#">Click here to enter response.</a>		

### 3.4. Mandatory Disclosure of Governmental Investigations

<b>3.4.1.</b>	<p>Pursuant to <b>RFP Section 3.14</b>, indicate whether your company and/or any of the proposed subcontractor(s) has been the subject of any adverse regulatory or adverse administrative governmental action (federal, state, or local) with respect to your company's performance of services similar to those described in this RFP. If any such instances are disclosed, Respondent must fully explain, in detail, the nature of the governmental action, the allegations that led to the governmental action, and the results of the governmental action including any legal action that was taken against Respondent by the governmental agency. While disclosure of any governmental action will not automatically disqualify Respondent from consideration, such governmental action and a review of the background details may result in a rejection of Respondent's proposal at the sole discretion of the Issuers. The Issuers will make this decision based on their determination of the seriousness of the claims, the potential impact that the behavior that led to the claims could have on Respondent's performance of the work, and the best interests of the Issuers.</p>	
<a href="#">Click here to enter response.</a>		





### 3.5. Customer References

<b>3.5.1.</b>	<p>Provide references of at least five (5) local government or educational institution customers for which your company has provided products and services similar in nature and scope to those defined in this RFP in the last three (3) years. At least three (3) of these references should be higher education customers. Each reference should include:</p> <ul style="list-style-type: none"> <li>• Customer name and location;</li> <li>• Customer contact person and his/her title, telephone number, and email address;</li> <li>• A brief description of the products and services provided by your company;</li> <li>• Customer relationship starting and ending dates; and,</li> <li>• Notes or other pertinent information relating to the customer and/or the products and services your company provided.</li> </ul>
---------------	---

Click here to enter response.

### 3.6. Insurance Coverage

<b>3.6.1.</b>	<p><b>General Liability, Property &amp; Automobile Insurance – Youngstown State University.</b> If Respondent is selected as the Winning Supplier, during the term of any agreements between the Respondent and YSU, and for two (2) years following expiration or termination of such agreements, Respondent, at its own expense, will maintain and will require that its agents, subcontractors, or suppliers engaged in Respondent's performance of its duties under such agreements, maintain general liability insurance, property insurance, and automobile insurance (at a minimum, in the amounts referenced in <a href="#">YSU's Insurance Coverage Limits Required</a> document.) applicable to any claims, liabilities, damages, costs, or expenses arising out of its performance under such agreements. Confirm that your company either a) has, or b) will purchase insurance coverage as described herein.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
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Click here to provide additional commentary, if necessary.

<b>3.6.2.</b>	<p><b>General Liability, Property &amp; Automobile Insurance – Sourcing Alliance.</b> If Respondent is selected as the Winning Supplier, during the term of any agreements between the Respondent and Sourcing Alliance, and for two (2) years following expiration or termination of such agreements, Respondent, at its own expense, will maintain and will require that its agents, subcontractors, or suppliers engaged in Respondent's performance of its duties under such agreements, maintain general liability insurance, property insurance, and automobile insurance (at a minimum, in the amount of \$1,000,000 per occurrence/\$5,000,000 annual aggregate) applicable to any claims, liabilities, damages, costs, or expenses arising out of its performance under such agreements. Confirm that your company either a) has, or b) will purchase insurance coverage as described herein.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
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Click here to provide additional commentary, if necessary.

<b>3.6.3.</b>	<p><b>General Liability, Property &amp; Automobile Insurance – Sourcing Alliance Members.</b> If Respondent is selected as the Winning Supplier, during the term of any agreements between the Respondent and a Sourcing Alliance Member participating in the Program, and for two (2) years following expiration or termination of such agreements, Respondent, at its own expense, will maintain and will require that its agents, subcontractors, or suppliers engaged in Respondent's performance of its duties under such agreements, maintain general liability insurance, property insurance, and automobile insurance (at a minimum, in the amount of \$1,000,000 per occurrence/\$5,000,000 annual aggregate) applicable to any claims, liabilities, damages, costs, or expenses arising out of its performance under such agreements. Confirm that your company either a) has, or b) will purchase insurance coverage as described herein.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
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<a href="#">Click here to provide additional commentary, if necessary.</a>		
3.6.4.	<b>Employee Dishonesty – Sourcing Alliance Members.</b> The Winning Supplier shall be held fully liable for any and all dishonest acts of its employees and/or its subcontractor’s employees. Coverage must be provided for Third Party Employee Dishonesty, covering all employees and all officers of your company and any subcontractors, in an amount not less than \$100,000 per occurrence. Confirm that your company either a) has, or b) will purchase insurance coverage as described above covering all employees and all officers of your company, in an amount not less than \$100,000 per occurrence for each Sourcing Alliance Member utilizing the Program.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
3.6.5.	<b>Third Party Employment Practice Liability – Sourcing Alliance Members.</b> The Winning Supplier shall be held fully liable for any and all employment practice acts of its employees and/or its subcontractor’s employees, such as, but not limited to, sexual harassment and discrimination. Coverage must be provided for employment practice liability, covering all employees and all officers of your company and any subcontractors, in an amount not less than \$1,000,000 per occurrence. Confirm that your company either a) has, or b) will purchase insurance coverage as described above covering all employees and all officers of your company, in an amount not less than \$1,000,000 per occurrence for each Sourcing Alliance Member utilizing the Program.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		

### 3.7. Contracting for Services

3.7.1.	Once a Sourcing Alliance Member decides to accept your company’s proposal for services as described in this RFP, what is the process for the member to become a customer? Does your company have standard customer agreements? If so, please provide copies of any standard customer agreements. What is the process for reviewing, negotiating, and finalizing any customer-specific contract terms or requirements? Approximately how long does the contracting process take to complete (i.e., secure a fully executed contract document)? What is the typical term length of your customer agreements?
<a href="#">Click here to enter response.</a>	





## Section 4. Product/System Features & Functionality

### 4.1. System User Interface (Administrators)

4.1.1.	<i>Describe how your System's Administrator interface is used to manage the System.</i>	
Click here to enter response.		
4.1.2.	<i>Upon termination of the contract, Supplier shall, at Client's request and at no additional cost, return Client's data in CSV or tab delimited text format within 30 days of contract expiration or termination of any kind.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.	<i>Which of the following Administrator interface capabilities are provided by your System?</i>	
4.1.3.1.	Allows for creating, editing, and deleting System Administrators.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.2.	Allows for creating Administrator permissions both individually or based on group membership and the applicable group permissions.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.3.	Enables Administrator permissions to be created individually or based on group membership and the applicable group permissions.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.4.	Provides detailed guidelines for Administrators defining the process of creating or configuring system functions.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.5.	Allows for an unlimited number of Patrons.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.6.	Supports, reads, and stores multiple identifier numbers, such as SIS number, prox, MiFare, and HID.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.7.	Offers an unlimited number of debit/credit, meal plan, stored value, declining value, bonus declining dollars, discretionary declining dollars, privileges, access rights, and activity/event accounts.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.8.	Offers an unlimited number of tenders with unlimited accounts per tender.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.9.	Supports an unlimited number of locations with differing uses and configurations. <b><u>Provide details about these System capabilities in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.10.	Provides the ability for Administrators to add and configure System locations based on function and use.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.1.3.11.	Provides the ability to search for Patrons using a wide array of search parameters based on Patron attributes.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		



4.1.3.12.	Provides data archiving and retrieval. <b><u>Provide details about these System capabilities in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.13.	Enables Administrators to design plans from the host or remote workstations via simple menu choices without special programming.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.14.	Provides web browser and mobile full administrative access without requiring the installation of administrator software on a Client machine. Minimally, mobile administrative access should include: <ul style="list-style-type: none"> <li>i. Retrieval of automatically generated and stored reports</li> <li>ii. Ability to generate ad-hoc reports.</li> <li>iii. Patron lookup.</li> <li>iv. Access assignments (such as add, edit, and delete access assignments, schedules, and calendars).</li> <li>v. Display emergency messages.</li> </ul> <b><u>Provide a complete list of all system functions that are accessible through the System's web-based or mobile interfaces in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.15.	Enables Administrators to display emergency messages system-wide, at individual locations, or at groups of locations (e.g., one or multiple point-of-sale locations).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.16.	Includes API support for multiple web services such as XML, JSON, REST, SOAP, CSV, C++, and JS.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.17.	Creates multiple Administrator-defined fields.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.18.	Offers customizable headers and colors at the Administrator level.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.19.	Logs changes by anyone making System edits.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.20.	Offers the ability to manually generate the full array of transaction types through the user interface.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.21.	Allows Administrators to import files on a manually and scheduled and/or automatic basis from various Client systems (i.e. add a list of new cardholders to the system).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.22.	Provides Administrators the ability to see errors on transaction data as it happens (such as live monitoring of denied or successful transactions).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.23.	Enables Administrators to set-up daily, weekly, and monthly schedules, as well as special schedules for end of semester operations, such as automatically updating cardholder accounts and access on a defined schedule. These tools/tasks/schedules are performed without Administrator intervention.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.24.	Allows Administrators to easily add, change, and delete Patrons and Patron information individually and by group as necessary, including both manually and by batch import.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	



4.1.3.25.	Has the ability to track Patron accounts by student specific ID number and ISO ( <b>Bank Card</b> ) number. (It should be possible, for example, to track a cardholder account by both numbers simultaneously, even if the ISO number has changed several times in the event of the replacement of lost or stolen cards).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.26.	Enables Administrators to add, delete, reinstate, and change a Patron's access, account, plan, and authorizations.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.27.	Enables Administrators to approve photos uploaded by Patrons before photos are authorized for use.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.28.	Allows for setting up a variety of Patron account templates. Respondents should describe this capability in detail and provide examples of their systems ability to provide this functionality.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.29.	Links Administrator-defined groups of privileges to specific plans, to assign privileges to Patrons in any combination by individual or group, to "chain" activities so cashiers and/or checkers do not need prior knowledge of plan or activity.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.30.	Provides for group or role-based assignments.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.31.	Enables management of flags or filters to apply business rules for privileges.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.32.	Allows Administrators to configure multiple transaction discounts for custom specified plans, locations, and/or activity types.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.33.	Enables the application of discounts by multiple types. For example, by plan, location, Patron type, card range, or on a defined schedule.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.34.	Provides for multiple transaction types and priorities at the point of sale to determine which purchase plan to use and/or discount to apply based on location. <b><u>Provide an explanation as to how these functions are accomplished in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.35.	Changes between different priority lists at the POS based on location or type of purchase plan being used.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.36.	Provides a clear standard for how ID cards are designated as damaged, lost, or stolen.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.37.	Provides a way to record and lock out lost cards which can be updated by Administrators, authorized Client staff, and by Patrons through a web interface.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.38.	Includes a clear process for the activation of expired cards, setting personal credit limits, and activation of suspended cards.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.1.3.39.	Enables instant deactivation of the entire profile of a Patron in the event of a lost/stolen scenario or possible disciplinary action.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
4.1.3.40.	If the System is offline, allows Patron account balances to go negative (Client-controlled parameter) when uploaded logged transactions exceed amount in account.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.1.3.41.	Stores offline transactions and processes them when the System comes back online.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.1.3.42.	Tracks all Patron accounts and regulates transfers and rollovers from one account into another.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.1.3.43.	Authorizes Administrators to review up-to-the-minute Patron biographical, account, and transaction histories from any authorized workstation and/or mobile device.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.1.3.44.	Enables the issuance of a temporary card to a Patron that assumes all the rights and privileges of the Patron for a defined period.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.1.3.45.	Provides the ability to use a shadow account for enrichment purposes to track real money separately from incentive money.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.1.3.46.	Provides Administrators with access to remote functions including: <ul style="list-style-type: none"> <li>i. Patron-interface transaction reporting</li> <li>ii. Patron-submitted photo approval</li> <li>iii. Patron-interface site text editing</li> </ul> <u>Provide a complete list of remote functions that are available to Administrators through your System in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.1.4.	<b><i>Are the following YSU-specific Administrator requirements are provided by your System?</i></b>	
	<ul style="list-style-type: none"> <li>i. Allows Administrators to easily add, change, and delete Patrons and Patron information individually and by group as necessary, including both manually and by batch import.</li> <li>ii. Requires the card to store the banner number in the mag stripe. We will be transitioning to ISO numbers.</li> <li>iii. Allows for a minimum of 25,000 Patrons.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	

## 4.2. Online Account Management

4.2.1.	<b><i>Describe how your System provides for online account management.</i></b>	
	Click here to enter response.	
4.2.2.	<b><i>Which of the following online account management capabilities are provided by your System?</i></b>	
4.2.2.1.	Includes PCI-DSS and PCI-PA-DSS certification.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
4.2.2.2.	Provides yearly AOC (attestation of compliance) testament of compliance.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.3.	Includes FERPA compliant Guest access.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.4.	Accepts MasterCard, Visa, American Express, Discover, ACH, mobile (such as Apple Pay, Samsung Pay, Google Pay, etc.), and online (such as bitcoin, PayPal, Venmo, Zelle, etc.) transactions for deposits.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.5.	Uses security features such as AVS and/or CVV entry.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.6.	Makes all deposited funds immediately available to the Patron.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.7.	Sets minimum and maximum deposit amounts.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.8.	Charges fixed fee and/or percentage transaction fees.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.9.	Stores credit card token information for future transaction processing with the ability to turn this feature off.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.10.	Allows for Guest deposits.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.11.	Integrates with central authentication method (such as ADFS, CAS, LDAP, Shibboleth).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.2.12.	Provides the ability to generate Regulation E compliant downloadable statement for Patrons.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.	<b><i>Which of the following online account management capabilities are supported in your System?</i></b>	
4.2.3.1.	Enables custom domain to be set up.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.2.	Enables custom skin to be used.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.3.	Provides low balance warnings to Patrons and Administrators.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.4.	Utilizes automatic deposits based on a low balance threshold or calendar event.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.5.	Allows Patrons to send an email to friends and family asking for a deposit into their debit account.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.6.	Maintains a list of Patrons who are restricted from making online deposits.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.7.	Configures information contained in emails sent to users.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
4.2.3.8.	Restricts days/times of the week during which an account can be used.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.9.	Sets a start date for when an account goes active.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.10.	Sets an account to reset to a specified amount on daily, weekly, monthly, quarterly, bi-annually, annual basis.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.11.	Chooses which account will charge a transaction fee for credit cards, Bursar, or ACH deposits.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.12.	Sets custom reader response messages for each account.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.13.	Restricts which readers can accept an account.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.14.	Defines if/how much an account can go negative (credit) for any reason.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.15.	Defines if/how much an account can go negative from offline transactions.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.16.	Sets an end date for when an account goes inactive.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.17.	Defines which accounts are able to receive deposits online.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.18.	Displays the remaining balance after every transaction.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.19.	Sets up drain order for account debits.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.20.	Sets anti-pass back rules.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.21.	Provides the ability to restrict usage of an account based on the cumulative total of transactions processed in a given period (such as day, week, etc.) by reader type.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.3.22.	Provides the ability to turn debit account on or off based on a specific calendar event.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
4.2.4.	<i>Are the following YSU-specific online account management requirements are provided by your System?</i>	
	<b>**YSU has no specific requirements for the System.**</b>	

### 4.3. System User Interface (Patrons)

4.3.1.	<i>Describe how your System's Patron interface is used to manage the System.</i>
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Click here to enter response.		
<b>4.3.2.</b>	<b><i>Which of the following Patron interface capabilities are provided by your System?</i></b>	
<b>4.3.2.1.</b>	Allows Patrons deposit funds to eligible plan(s).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.2.2.</b>	Allows Patrons access to a view/print up-to-the-minute account information, transaction history, balance, and all current/past plans for Patron-specified date ranges through a web interface or from any workstation or mobile device using their ID card.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.2.3.</b>	Allows Patrons to report and deactivate lost or stolen cards and reactivate the card, if found, without Administrator input.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.2.4.</b>	Allows Patrons to segregate deposits into multiple accounts.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.2.5.</b>	Enables Patrons to interact with the System (such as through smart-phone application, web browser, and kiosks).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.2.6.</b>	Allows for local control of Patron accounts (deposits, transfers, withdrawals, etc.).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.2.7.</b>	Allows Patrons to override defined limit (daily, etc.).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.2.8.</b>	Allows Patrons to purchase full or prorated meal plans, upload photos, make deposits to stored value plans (includes retail and dining points used for things like print stations), and report lost or stolen cards through mobile or web-based applications	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.2.9.</b>	Supports a variety of privilege types including: <ul style="list-style-type: none"> <li>i. Yes/no.</li> <li>ii. Credit/debit.</li> <li>iii. Single/multi-use.</li> <li>iv. Attendance.</li> <li>v. Classroom attendance tracking.</li> </ul> <b><u>Provide a complete list of the privileges types supported in the System's user interface in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>4.3.3.</b>	<b><i>Are the following YSU-specific Patron interface requirements are provided by your System?</i></b>	
	<ul style="list-style-type: none"> <li>i. Incorporates a customer loyalty/reward program into the Patron-facing user interface.</li> <li>ii. Provides ability for Patron to change meal plan via mobile app or web-based interface for meal plan groupings.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	





## 4.4. Reporting

4.4.1.	<i>Describe your System's reporting capabilities.</i>	
Click here to enter response.		
4.4.2.	<i>Which of the following reporting capabilities are provided by your System?</i>	
4.4.2.1.	Generates ad-hoc reports (via filter), and save, print, or export to .pdf, .xlsx, or csv.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.4.2.2.	Provides comprehensive real-time information.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.4.2.3.	<p>Provides a full variety of reports for tracking and analyzing demographics of campus card operations (i.e. canned reports). Standard reports should minimally include:</p> <ul style="list-style-type: none"> <li>i. Declining balance, charge, and cash reports.</li> <li>ii. Plan reports.</li> <li>iii. Transaction history by individual patron or by location for a specified date range.</li> <li>iv. Activity (privilege) reports.</li> <li>v. Management reports.</li> <li>vi. Maintenance reports.</li> <li>vii. Membership reports.</li> <li>viii. Historical reports.</li> <li>ix. Cumulative and comparative history reporting for all plans, privileges, items, readers, or combinations thereof.</li> <li>x. Summary information about patrons and their privileges and accounts for a given date/time range.</li> <li>xi. Transaction information for a Patron or selection of Patrons within a specified range of ID numbers and/or a specified date range.</li> <li>xii. Privilege use activity at a specified location for a range of dates and times.</li> <li>xiii. All or some of the transactions performed by an authorized operator for a range of dates.</li> </ul> <p><b><u>Provide a complete list of existing standard (canned) reports available and samples of standard reports in the green comment box immediately below.</u></b> If using an attachment to supplement or replace your commentary below, see <b><u>Section 2.3. - Attachments</u></b> of <b><u>Attachment A - Technical Proposal Requirements and Specifications</u></b> for instructions.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
4.4.2.4.	<p>Enables Administrators to create and store custom-designed reports based on any individual or group of fields in the System. The System should include a report builder which is sufficiently intuitive for a novice to utilize does not require SQL or similar query skills and includes:</p> <ul style="list-style-type: none"> <li>i. Configuration of information for a single reader or multiple readers.</li> <li>ii. List of account holders for a single account or multiple accounts.</li> <li>iii. Reconciliation of debit/credit account balances with the balance of a single or any combination of multiple reader transactions for a specified date or defined date range.</li> </ul> <p><b><u>Provide a complete list of the custom-designed reporting capabilities included in your System in the green comment box immediately below.</u></b> If using an attachment to supplement or replace your commentary below, see <b><u>Section 2.3. Attachments</u></b> of <b><u>Attachment A - Technical Proposal Requirements and Specifications</u></b> for instructions.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No



	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.5.	Provides a detail or summary view of all activity (such as sales, deposits, refunds, resets, withdrawals, and transactions) for a single cardholder, multiple cardholders, single reader, multiple readers, single account, multiple accounts, single admin user, and multiple admin users.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.6.	Allows Administrators to define time periods and names for accounting and reporting purposes.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.7.	Allows Administrators to define reporting time periods to reflect the specific operating schedules of various facilities across campus.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.8.	Enables Administrators to custom design standard scheduled report(s) run at regular intervals (daily, weekly, monthly, and on Administrator-specified occasions) without Respondent intervention. Reports may be emailed to users without licensed accounts.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.9.	Generates reports on a daily, weekly, monthly, quarterly, bi-annual, annual, or specified start/end date and time basis.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.10.	Restricts access to specific reports, based on admin permissions assigned to an Administrator.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.11.	Distributes reports to email addresses, the screen, or an attached printer.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.12.	Provides an ODBC (Open Database Connectivity) protocol configuration for communicating with the System's database so Client can extract the data required for conversion and use with other Client systems.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.13.	Provides the ability to use third-party reporting package with direct database access as may be needed to meet the requirements of Administrators.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.2.14.	Generates all reports at any time without interrupting the online operation of your System.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
4.4.3.	<b><i>Are the following YSU-specific reporting requirements are provided by your System?</i></b>	
	<ul style="list-style-type: none"> <li>i. Provides the ability to schedule and automatically send emails any report in a predetermined format from the reporting interface.</li> <li>ii. Distributes reports to email addresses, a device's screen, or an attached printer.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	



## Section 5. Cards & Card Production Specifications

### 5.1. Cards & Card Production

5.1.1.	<i>Describe your System's card and card production capabilities.</i> Please note: Respondents may use the existing equipment for card production or propose new equipment. If you are proposing new equipment, please provide, at minimum, a description of the hardware.	
Click here to enter response.		
5.1.2.	<i>Describe the hardware options available to Clients.</i> Hardware should be recognized industry-standard hardware.	
Click here to enter response.		
5.1.3.	<i>Describe the hardware and software features of your card production system.</i>	
Click here to enter response.		
5.1.4.	<i>Describe the card production technology and applicable security features of that technology.</i>	
Click here to enter response.		
5.1.5.	<i>Which of the following card and card production capabilities are provided by your System?</i>	
5.1.5.1.	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
5.1.5.2.	Contains a mechanism to encode card stock with information from the Patron's records (such as photo, electronic signature, patron name, university ID Number, card number / ISO number, current lost card code, etc.).	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
5.1.5.3.	Supports a single multi-tech card (such as magstripe, barcode, contactless, proximity and chip).	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
5.1.5.4.	Provides the ability to use smartphone-based card application options (such as Android, iOS, and Windows platforms) including at least one of the following: NFC, barcode, and/or Bluetooth Low Energy (BLE). <b><u>Provide a complete list of the smartphone-based card application options available with the System.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
5.1.5.5.	Provides ability to read pre-encoded information from the card and store into the System (such as card serial number, Proximity ID, etc.) at time of card production.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
5.1.5.6.	Functions with commercially available card printers. <b><u>Provide a list of all non-proprietary commercially available card printers that are compatible with the system.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
5.1.5.7.	Interfaces with other administrative systems and third-party applications over the campus network (such as ERP systems and Student Information System (SIS) using TCP/IP and web services interface.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		



5.1.5.8.	Provides the ability to download/upload database information (such as Patron's biographical records, deletions, late registrations, etc.) to and from other administrative systems and third-party applications.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.9.	Relates the entity type to a specific card template.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.10.	Provides the ability to print to one or more printers located locally or on the network and can occur automatically based on the rules defined within the student information system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.11.	Enables the printing of cards by selecting the credential or entity type, the card template (when applicable), and clicking print.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.12.	Includes Card designer software capable of designing cards for all entity types (Patrons, employees, contractors, Guests, etc.) within the same location.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.13.	Provides the ability to copy and paste available card template objects from one design to another without compromising object size, placement or configuration.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.14.	Provides the ability to set the border thickness, border color, and fill color of card objects (content).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.15.	Allows for card template import and export functions to allow the sharing of card templates between distinct and independent systems. <b><u>Provide a complete list of which file types are compatible with your import and export functions within the System.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.16.	Enables fields (including custom fields) and information to be automatically pulled from the student identification system database.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.17.	Allows User to add custom fields (user-defined fields) to credentials.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.18.	Allows for scheduled sync of one or multiple database(s).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.19.	Creates one security user and allows for creation of an unlimited number of security groups and users.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.20.	Supports the configuration and management of secure credentials (such as access cards and keypad PIN numbers). A User shall be able to add, delete, disable, or modify a credential if he has the appropriate privileges.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.21.	Permits Administrators to add, delete, disable, or modify a credential if they have the appropriate privileges.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.22.	Allows for the automatic deactivation of an old card credential in the access control system as soon as a new card is issued.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.23.	Provides the ability to save and search user records, with option to create configurable search criteria.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	



5.1.5.24.	Provides screen push functionality for seamless population of third-party enrollment screens and applications.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.25.	Provides the ability to read card numbers and merge them into the database during the card issuance process, eliminating a manual card number enrollment process.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.26.	Provides the ability to produce virtual credentials for use on NFC-enabled mobile devices.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.27.	Supports the printing credentials in native .XPS format to any device.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.28.	Provides detailed web-based reporting on entities (including First Name, Last Name, Entity Type, Photo, Card Information and any custom data fields). Reports shall be accessible from any location on the network.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.29.	Supports standard portrait and landscape card formats, custom card sizes and dual-sided cards.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.30.	Allows for the creation of multiple card templates that define the content and presentation format of a cardholder card to be printed.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.31.	Integrates with other security applications including visitor management, access control and time management.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.32.	Provides the ability for fields to be interchangeable between static and dynamic.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.33.	Includes an interface for uploading Patron-supplied ID photos.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.34.	Provides support for multiple ID card designs for various Patron types (such as student, faculty, staff, alumni, visitors, conferences).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.35.	Provides software with the ability to support multiple user security levels.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.36.	Provides software with the ability to support batch printing of credentials (such as batch printing of new student cards during orientation or guest cards).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.37.	Offers access to web-based reports. Data generated via web-based reports must be able to be exported as PDF or Excel files.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.38.	Allows data generated via web-based reports to be exported as PDF or Excel files.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.39.	Allows for the use of non-proprietary cards.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
5.1.5.40.	Uses the standard American Banking Association Track II high energy magnetic stripe and encoding.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	



5.1.5.41.	Enables customization of mag-stripe formatting (such as beginning sentinel, patron number [nine digits], divider, lost card code, client identifier, end sentinel).	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
5.1.5.42.	<p>Provide the following card, card design, and card production capabilities:</p> <ul style="list-style-type: none"> <li>i. Ability to add ghosting/opacity effects to any image.</li> <li>ii. Oversized design canvas with drag-off capability.</li> <li>iii. Flexible font sizing and colors.</li> <li>iv. Word wrap, shrink, and truncate text.</li> <li>v. Ability to flip between front and back of card.</li> <li>vi. Multiple layers (Z-Order).</li> <li>vii. Multiple field selection and alignment.</li> <li>viii. Field masking.</li> <li>ix. Background color fill.</li> <li>x. Magnetic stripe encoding.</li> <li>xi. Integrated photo capture (TWAIN, DirectShow &amp; WIA).</li> <li>xii. Auto-crop and zoom of images (ID Pix).</li> <li>xiii. Signature capture.</li> <li>xiv. Save multiple images per record.</li> <li>xv. Import images from a file.</li> <li>xvi. Crop images upon import.</li> <li>xvii. Export images.</li> <li>xviii. Multi-campus record filtering.</li> <li>xix. Read only option.</li> <li>xx. Event driven email notifications.</li> <li>xxi. Selective black (K) panel printing.</li> <li>xxii. Drop down list fields.</li> <li>xxiii. Auto-sequence fields.</li> <li>xxiv. Auto record retrieval via card scan.</li> <li>xxv. Print individually or batch print.</li> <li>xxvi. Single or dual-sided printing.</li> <li>xxvii. Conditional print rules.</li> <li>xxviii. Wizard for managing user account privileges.</li> <li>xxix. User audit trail.</li> </ul> <p><b><u>Provide a complete list of the card and card production capabilities available with the System in the green comment box immediately below.</u></b> If using an attachment to supplement or replace your commentary below, see <b><u>Section 2.3. - Attachments</u></b> of <b><u>Attachment A - Technical Proposal Requirements and Specifications</u></b> for instructions.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
5.1.5.43.	<p>The contents of a card template must be able to include:</p> <ul style="list-style-type: none"> <li>i. The cardholder's first name.</li> <li>ii. The cardholder's last name.</li> <li>iii. The cardholder's picture.</li> <li>iv. Custom fields.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No





	<ul style="list-style-type: none"> <li>v. Bitmap graphics.</li> <li>vi. The name of the cardholder's credential.</li> <li>vii. Lines and rectangles.</li> <li>viii. Dynamic text labels linked to custom fields.</li> <li>ix. Static text labels.</li> <li>x. Barcodes (Code 39, Code 128, PDF417, Interleaved 2 of 5, QR, EPIC and others).</li> <li>xi. Magnetic stripe encoding.</li> </ul> <p><b><u>Provide a complete list of the card template's input fields available with the System in the green comment box immediately below.</u></b> If using an attachment to supplement or replace your commentary below, see <b><u>Section 2.3. - Attachments</u></b> of <b><u>Attachment A - Technical Proposal Requirements and Specifications</u></b> for instructions.</p>	
<p style="text-align: center;"><a href="#">Click here to provide additional commentary, if necessary.</a></p>		
<p><b>5.1.6.</b></p>	<p><b><i>Are the following YSU-specific card and card production requirements are provided by your System?</i></b></p>	
<p><b><i>**YSU has no specific requirements for the System.**</i></b></p>		

## Section 6. Access Control Systems

### 6.1. System User Interface (Administrators)

<p><b>6.1.1.</b></p>	<p><b><i>Describe how the access control system's user interface works.</i></b> Provide a list of the operations that can be managed with the access control system.</p>
<p style="text-align: center;"><a href="#">Click here to enter response.</a></p>	





<b>6.1.2.</b>	<i>Describe the available levels of post-implementation support and a description of what each level contains.</i>	
Click here to enter response.		
<b>6.1.3.</b>	<i>Which of the follow capabilities are included with your access control system's user interface?</i>	
<b>6.1.3.1.</b>	Provides a comprehensive access control system specifically designed to meet the unique needs of the college or university campus.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.2.</b>	Offers a multi-user, multi-tasking environment and distributed system architecture.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.3.</b>	Provides the ability to expand to an unlimited number of doors, alarm inputs and outputs.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.4.</b>	Supports unlimited offline card holders, offline transactions, and schedules.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.5.</b>	Offers ability access for multiple floors.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.6.</b>	Offers a single door controller with Power over Ethernet (PoE) capability capable of supporting all access devices at the door.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.7.</b>	Supports DHCP addressing.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.8.</b>	Supports virtual door implementation for scheduled locking and unlocking of non-card reader equipped doors.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.9.</b>	Provides the ability for the privilege to be assigned to select administrators to allow multiple card swipes within a defined period to change the door state from locked to unlocked and vice versa.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.10.</b>	Provides the ability to tie into existing building alarms.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.11.</b>	Displays a map of the entire campus, indicating access attempts, alarms, and other special conditions in real time.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.12.</b>	Provides online diagnostics and context sensitive help and instructions for special conditions like alarms.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.13.</b>	Supports a variety of alarm conditions, with the possibility of assigning multiple alarm priorities and system responses.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.14.</b>	Supports Patron alarm capability from any online reader or point of sale device.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.15.</b>	Integrates video surveillance capabilities as a part of a comprehensive security solution.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>6.1.3.16.</b>	Integrates IP Audio audible emergency alert systems.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
6.1.3.17.	Associates video with an alarm event. Video must be available from the alarm management screen not requiring separate application software to be accessed.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.1.4.	<i>Are of the following YSU-specific System User interface requirements provided by your System?</i>	
	<b>**YSU has no specific requirements for the System.**</b>	

## 6.2. Access Control Card Readers

6.2.1.	<i>Describe your System's access control card readers.</i>	
	Click here to enter response.	
6.2.2.	<i>Which of the following features and capabilities are included with the access control card readers?</i>	
6.2.2.1.	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.2.	Provides the option of different types of readers (such as plain swipe-style card readers, card readers with keypads, and doorframe mounted "mullion" readers).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.3.	Provides system compatibility with contactless technology (such as proximity, NFC, Bluetooth and RFID). <b><u>Provide a complete list of contactless technology that is compatible with your access control card readers in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.4.	Includes industry-standard non-proprietary equipment	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.5.	Includes all-weather housing and be water and weather resistant.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.6.	Provides light emitting diodes ("LEDs") to indicate valid and invalid card reads, door forced or open conditions, access denied, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.7.	Includes tamper resistant features to alert security when card readers are vandalized.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.8.	Includes the ability to securely read, interpret, and authenticate access control data from contactless smart card credentials.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.9.	Includes customized security protection through support of a portable credential methodology.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
	Enables ease of installation through identical wiring.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.10.	Enables backwards compatibility with legacy access control formats.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	



6.2.2.11.	Offers a full product line of compatible products including readers, readers with integral keypads and, credentials and cards.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.12.	Offers Anti-passback Notification that the card has already been processed and it must be removed from reader field temporarily prior to processing again.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.13.	Provides universal compatibility with most access control systems by outputting card data in compliance with the SIA AC-01 Wiegand standard.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.14.	Configures to provide Clock-and-Data output.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.15.	Provides secure, bidirectional communication in compliance with v2 of the SIA OSDP (Open Supervised Device Protocol) standard.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.16.	Uses programming cards to upgrade the reader's firmware in the field.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.17.	Provides the ability to upgrade its application code using pre-configured firmware cards. This feature shall allow previously installed readers be reconfigured to modify their behavior and capabilities as the project environment evolves.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.18.	Allows for secure installation through mounting methods utilizing tamper resistant screws.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.19.	Meets safety regulatory compliance FCC Certification (US).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.20.	Provides the ability to transmit an alarm signal via an integrated optical tamper switch if an attempt is made to remove the reader from the wall. The tamper switch shall be programmable to provide a selectable action compatible with various tamper communication schemes provided by access control panel manufacturers. The selectable action shall include the following: <ul style="list-style-type: none"> <li>i. The reader open collector line changes from a high state (5V) to a low state (Ground). During a tamper state, the "I'm Alive" message is inverted.</li> </ul> <b><u>Provide a complete list of the selectable actions available with the System's tamper switch in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.21.	Provides ability for an on-line "I'm Alive" message so the reader's functional health can always be monitored when paired with a compatible access control panel.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.22.	Provides customizable reader behavior options either from the factory or defined in the field through the use of pre-configured command cards. Reader behavior programming options shall include the following: <ul style="list-style-type: none"> <li>i. Audio/Visual Templates for card reads, and attack detection.</li> <li>ii. Velocity Check timing and thresholds.</li> <li>iii. Optical tamper actions.</li> <li>iv. RF scan delay.</li> <li>v. Hold Mode.</li> <li>vi. Intelligent Power Management.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No



	<p>vii. Key diversifiers. viii. Key rolling. ix. CSN output configuration. x. Data Model prioritization. xi. Default LED color.</p> <p><b><u>Provide a complete list of behavior options available with the System's access control readers in the green comment box immediately below.</u></b> If using an attachment to supplement or replace your commentary below, see <b><u>Section 2.3. - Attachments</u></b> of <b><u>Attachment A - Technical Proposal Requirements and Specifications</u></b> for instructions.</p>	
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.23.	<p>Provides the following programmable audio/visual indication:</p> <p>i. A high-intensity red/green/blue ("RGB") light bar shall provide clear visual status. The light bar shall provide uniform distribution of light eliminating individual bright spot. ii. An audio beeper shall provide various tone sequences to signify; access granted, access denied, power up, and diagnostics.</p> <p><b><u>Provide a list of all indication options available with the System's access control readers in the green comment box immediately below.</u></b></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.24.	<p>Provides ADA compliant capabilities. <b><u>Provide a list of all ADA complaint capabilities available with your access control readers in the green comment box immediately below.</u></b></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.25.	<p>Provides the ability for mounting to standard electrical boxes through the use of universal international mounting holes.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.26.	<p>Enables user prioritization of high-frequency/high-frequency credential reads. Technology prioritization shall synchronize a site's credential technology read priority to the access panel configuration while reducing unintended credential reads.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.27.	<p>Includes the ability to provide consistent optimal read range by implementing an auto-tune function that adjusts for manufacturing tolerances to enhance consistency of performance from reader to reader.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.28.	<p>Provides the ability to be field programmable to provide secure upgrades for migration and extended lifecycle.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.29.	<p>Provides optimal read range and read speed for increased access control throughput.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.30.	<p>Reduces power consumption.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.31.	<p>Includes at least 10% recycled material to provide the potential of LEEDS building credits in construction projects.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
6.2.2.32.	<p>Complies with Restriction of Hazardous Substances directive ("RoHS") restricting the use of specific hazardous materials found in electrical and electronic products. The substances banned under RoHS are lead (Pb), mercury (Hg), cadmium (Cd), hexavalent chromium (CrVI), polybrominated biphenyls (PBB) and polybrominated diphenyl ethers (PBDE).</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
6.2.2.33.	Complies with the following standards to ensure product compatibility and predictability of performance: i. ISO 15693. ii. ISO 14443A. iii. ISO 14443B. <b>Provide a complete list of compatibility and performance standards which comply with the System in the green comment box immediately below.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.34.	Provides a full potted assembly.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.35.	Enables contactless smart card migration from most legacy proximity applications through low current operation without the need to replace existing access control panels and/or power supplies.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.36.	Operates in a temperature range of -31 to 150 degrees F (-35 to 65 degrees C).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.37.	Operates in a humidity range of 5% to 95% relative humidity non-condensing.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.38.	Provides the ability to be stored in a temperature range of -67 to 185 degrees F (-55 to 85 degrees C).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.39.	Provides the ability to withstand harsh environments with a rating of IP55 or IP65 per IP Code of International Electrotechnical Commission.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.40.	Ensures secure connections where all cryptographic keys governing system security are delivered with end-to-end privacy and integrity.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.41.	Provides a lifetime warranty against defects in materials and workmanship.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.42.	Provides the capability to be utilized in ADA compliant openings.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.2.43.	Coordinates with ADA operator equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.2.3.	<b>Are of the following YSU-specific requirements provided by your System?</b>	
	<b>**YSU has no specific requirements for the System.**</b>	

### 6.3. Access Control Software

6.3.1.	<i>Describe your System's access control software.</i>	
	Click here to enter response.	
6.3.2.	<i>Describe the forms of authentication (such as card only, card or keypad, or card and keypad) supported by your System.</i>	



Click here to enter response.		
<b>6.3.3.</b>	<b><i>Which of the following capabilities are included with your System's access control software?</i></b>	
<b>6.3.3.1.</b>	Offers an enterprise class access control software solution.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.2.</b>	Integrates with the card production software.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.3.</b>	Provides the ability to perform and integrate with multiple security functions (Such as the configuration, management and monitoring of cardholder access, hardware units (controllers), events, alarms, and real-time tracking and reporting).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.4.</b>	Generates scheduled reports right for the access control software interface. The System should allow for identifying predetermined recipients of the automated reports.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.5.</b>	Provides the ability to scale upwards to include provisions for future growth.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.6.</b>	Supports multiple access control lock hardware manufacturers.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.7.</b>	Integrates with multiple non-proprietary interface modules, access readers, and other third-party applications.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.8.</b>	Supports mixed configurations of hardware devices and lock hardware (such as single Power of Ethernet (PoE) enabled controllers, two reader controllers, and wireless locks).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.9.</b>	Supports an unrestricted number of controllers and interface cards.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.10.</b>	Supports an unrestricted number of logs and historical transactions (such as events and alarms) with the maximum allowed being limited by the amount of hard disk space available.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.11.</b>	Supports the configuration and management of doors. An Administrator shall be able to add, delete, or modify a door if he has the appropriate privileges.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.12.</b>	Permits multiple access rules to be associated to a door.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.13.</b>	Supports the configuration and management of schedules. An Administrator shall be able to add, delete, or modify a schedule if he has the appropriate privileges.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.14.</b>	Allows a User to initiate lockdown via a physical input button.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.15.</b>	Includes a toggle feature to allow a Patron to change the state of a door with their primary ID card.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>6.3.3.16.</b>	Requires multi-technology card readers (such as magstripe, barcode, contactless, proximity and chip).	<input type="checkbox"/> Yes <input type="checkbox"/> No





	Click here to provide additional commentary, if necessary.	
6.3.3.17.	Supports multiple card formats (such as MOCA, BadgePass, Schlage, XceedID, MIFARE, HID Proximity protocols, HID iClass, GE/CASI, ProxLite, AWID Proximity, LenelProx, etc.). <b>Provide a complete list of the card formats supported and identify any major brands or formats that are NOT supported in the green comment box immediately below.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide a list of all card formats which are not currently supported by your System.	
6.3.4.	Are the following YSU-specific requirements provided by your System?	
<b>**YSU has no specific requirements for the System.**</b>		

### 6.4. Wireless Access Control System

6.4.1.	Describe your wireless access control offerings and capabilities.	
	Click here to enter response.	
6.4.2.	Which of the follow capabilities are included with your wireless access control system?	
6.4.2.1.	Provides the capability to be utilized in ADA compliant openings.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.4.2.2.	Coordinates with ADA operator equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
6.4.3.	Which of the following YSU-specific requirements are provided by your System?	
<b>**YSU has no specific requirements for the System.**</b>		

### 6.5. Biometric Access Control System

6.5.1.	Describe your biometric access control system offerings and capabilities.	
	Click here to enter response.	
6.5.2.	Which of the following YSU-specific requirements are provided by your System?	
<b>**YSU has no specific requirements for the System.**</b>		

### 6.6. Offline Access Control System

6.6.1.	Describe your offline access control system's offerings and capabilities.	
	Click here to enter response.	
6.6.2.	Which of the following YSU-specific requirements are provided by your System?	





<i>**YSU has no specific requirements for the System.**</i>



## Section 7. Point-of-Sale (POS) Hardware & Terminals

### 7.1. Point-of-Sale (POS) Hardware

7.1.1.	<i>Describe your point-of-sale (POS) hardware &amp; terminals.</i>	
Click here to enter response.		
7.1.2.	<i>Describe the range of "small footprint" POS workstation options available with your System.</i>	
Click here to enter response.		
7.1.3.	<i>Describe the available levels of post-implementation support and a description of what each level contains.</i>	
Click here to enter response.		
7.1.4.	<i>Which of the following capabilities are provided by the System's point of sale hardware?</i>	
7.1.4.1.	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
7.1.4.2.	Provides the ability to select applications based on standard-based, non-proprietary specifications.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
7.1.4.3.	Offers POS Terminals which use the following: <ul style="list-style-type: none"> <li>i. Internal solid state flash storage (i.e. without a hard drive).</li> <li>ii. POS security-hardened operating system currently supported by the vendor.</li> <li>iii. Color touch screen.</li> <li>iv. A wide range of POS capabilities.</li> </ul> <b><u>Provide a complete list of POS terminal's capabilities available with the system in the green comment box immediately below.</u></b> If using an attachment to supplement or replace your commentary below, see <b><u>Section 2.3. - Attachments</u></b> of <b><u>Attachment A - Technical Proposal Requirements and Specifications</u></b> for instructions.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
7.1.4.4.	Offers an easy-to-use device, designed as a POS workstation for harsh foodservice and retail environments.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
7.1.4.5.	Fully integrates with the campus card system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
7.1.4.6.	Supports direct communication with Client's campus card system via TCP/IP without the use of intermediate controllers or other communications devices. <b><u>Please indicate if a wireless POS option is available in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
7.1.4.7.	Supports offline transaction logging.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
7.1.4.8.	Offers a wide range of standard reports on employees, system units, revenue centers and historical data from any POS workstation. Systems where POS reports are only available from a central location are not acceptable.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
7.1.4.9.	Supports a wide variety of POS-compliant peripherals, such as printers, kitchen display systems, scales, coin changers and bar code scanners.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary. Please provide a complete list of the peripherals supported by your System.	
7.1.4.10.	Supports online magnetic stripe card technology without the need for an additional card reader.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.11.	Supports board meals, declining balance, meal equivalency and default exchange options, and privilege entitlement verification.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.12.	Reports all sales that occur in the POS system regardless of tender (such as card, cash, credit card, etc.). Must be reported at the central card system providing for enterprise wide reporting capabilities.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.13.	Offers credit card processing.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.14.	Includes a process for handling hardware and software service issues.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.15.	Provides a link to the POS manufacturer's helpdesk to dispatch hardware related issues directly to the manufacturer on behalf of the client link through your helpdesk.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.16.	Provides installation and training for POS terminals.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.17.	Includes a kiosk food ordering system including a text notification feature.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.18.	Works with mobile POS devices (such as seat ordering at stadiums).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.4.19.	Offers privilege verification through readers in activity locations (for example, the Client shall be able to assign a default activity to individual card readers so that only a card swipe/tap is required). If privileges are applied for access or entry, the reader should allow for the benefit to be applied (such as entry and discounts).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.1.5.	<i>Provide any additional features your company adds to the proposed hardware beyond integration with the proposed transaction processing system.</i>	
	Click here to enter response.	
7.1.6.	<i>Are the following YSU-specific requirements provided by your System?</i>	
	<ul style="list-style-type: none"> <li>i. Offers "dynamic Routing" between the POS and kitchen monitors as required by some Foodservice providers.</li> <li>ii. Provides the ability to type in patrons name for orders into POS system interface.</li> <li>iii. Offers a web-based interface for system configuration.</li> <li>iv. Ensures all POS are EMV/P2PE compliant.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No



	v. Supports multiple credit card processor merchant accounts.	
	vi. Accepts mobile payment and though the proposed card technology.	
<b>7.1.7.</b>	<i>YSU requests suggestions for innovative solutions to <u>redesign</u> the current POS hardware and terminal locations, terminals, and configuration.</i> Please see the site document for our current site POS footprint in <u>Attachment A - YSU Point of Sale Site Map</u> .	
Click here to enter response.		
<b>7.1.8.</b>	<i>YSU request suggestions for innovative solutions to <u>upgrade</u> our current POS hardware and terminals.</i> Please see the site document for our current site POS footprint in <u>Attachment A - YSU Point of Sale Site Map</u> . The scope of this request should include suggestions for a new Point of Sale Site Map solution.	
Click here to enter response.		

## 7.2. Terminal(s)

<b>7.2.1.</b>	<i>Describe the POS terminal options available with the System.</i>	
Click here to enter response.		
<b>7.2.2.</b>	<i>Which of the following capabilities are included with the System's POS terminals?</i>	
<b>7.2.2.1.</b>	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>7.2.2.2.</b>	Provides Or highly visible multiple line displays capable of clearly indicating the result of an attempted transaction and alerting the operator of an off-line condition or other special event.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>7.2.2.3.</b>	Supports direct TCP/IP communications without additional wiring or communications device (support both wired and wireless options as applicable).	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>7.2.2.4.</b>	Provides the ability, if communications with the host are lost, to log transactions in an off-line state and is able to upload logged transaction information to the host when communications are restored.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>7.2.2.5.</b>	Includes the ability to be User programmable from the application, or another card reader, as well as using its own keypad.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>7.2.2.6.</b>	Provides error messages and diagnostic routines to help system operators troubleshoot problems with or without the assistance of supplier technical support (such as offline notification, audible sound errors).	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>7.2.2.7.</b>	Provides additional payment methods like stored value and credit/debit transaction. <b><u>Provide any other payment methods your POS terminals accept in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide any other payments methods your POS terminals accept.		
<b>7.2.2.8.</b>	Communicates with host system directly over TCP/IP and cellular without the requirement of intermediate controllers or terminal servers	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
<b>7.2.3.</b>	<i>Describes the System's copy/print terminals.</i>	
	Click here to provide additional commentary, if necessary.	
<b>7.2.4.</b>	<i>Which of the following capabilities are included with the System's vending terminals?</i>	
<b>7.2.4.1.</b>	Communicates with host system directly over cellular or TCP/IP networking without the requirement of intermediate controllers or terminal servers.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>7.2.5.</b>	<i>Which of the following capabilities are included with your System's laundry terminals?</i>	
<b>7.2.5.1.</b>	Supports multiple laundry units.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>7.2.5.2.</b>	Includes the number of laundry units per reader.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>7.2.6.</b>	<i>Does the System offer any of the following terminals?</i>	
<b>7.2.6.1.</b>	Health Center, Post Office, Auxiliary Services Business Office, Copies Plus, Center for the Arts Box Office, Stephens Hall Box Office, and Printer Services. <b>Provide any other terminal types available with the System in the green comment box immediately below.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to describe any of the other terminals your system offers.	
<b>7.2.7.</b>	<i>Are following YSU-specific requirements provided by your System?</i>	
<b>**YSU has no specific requirements for the System.**</b>		

### 7.3. Small Retail and Activity Terminal

The small retail and activity terminal will be used for online activity and privilege checking and for transactions at small retail and unattended locations (concession stand, convenience store, espresso bar, etc.).

<b>7.3.1.</b>	<i>Describe the small retail and activity terminals available through the System.</i>	
	Click here to enter response.	
<b>7.3.2.</b>	<i>Which of the following capabilities are included with the System's small retail and activity terminals?</i>	
<b>7.3.2.1.</b>	Uses industry-standard non-proprietary equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>7.3.2.2.</b>	Offers a compact and light-weight design for easy relocation (such as iPads and Android Tablets).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>7.3.2.3.</b>	Offers compact and light for easy relocation.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
7.3.2.4.	Includes a swipe-style card slot with a floating read head and durable keyboard.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.5.	Offers a highly visible multiple line display capable of clearly indicating the result of an attempted transaction and alerting the operator of an off-line condition or other special event.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.6.	Supports direct TCP/IP, wireless, and cellular communications without additional wiring or communications device.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.7.	Provides privilege verification in activity locations. The Client should be able to assign a default activity to individual card readers so that only a card swipe is required.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.8.	Functions as a cash register with the addition of an integrated electronic cash drawer in small retail locations.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.9.	Provides an integral (not attached) receipt printer to accommodate a sales slip.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.10.	Displays information associated with the User's account (such as plan number, card status, activity group, date card last used, and balances in multiple accounts) during an operator inquiry. <b><u>Provide what other Client account information can be displayed during an operator inquiry in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.11.	Allows operators to report lost cards from the card reader to the system host,	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.12.	Allows Administrators to define authorized operators so that no transactions can be run unless an authorized operator has signed in.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.13.	Provides the ability for the card reader automatically log transactions into battery-protected memory in an off-line state in the event that communications with the host are lost. It should be able to upload logged transaction information to the host when communications are restored.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.14.	Provides error messages and diagnostic routines to help system operators troubleshoot problems with or without the assistance of vendor technical support.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.15.	Restricts functions to authorized operators and management.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.2.16.	Includes a footprint small enough to be supported on a depot return basis.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
7.3.3.	<b><i>Which of the following YSU-specific requirements are provided by your System?</i></b>	
	<b><i>**YSU has no specific requirements for the System.**</i></b>	



## Section 8. Integration & Functionality

### 8.1. Interfaces

<b>8.1.1.</b>	<i>Describe your System's approach to integration and functionality.</i>	
	Click here to enter response.	
<b>8.1.1.1.</b>	<i>Describe the communications architecture included with your System.</i>	
	Click here to enter response.	
<b>8.1.1.2.</b>	<i>Describe the file protocols required by your System to accomplish database information sharing with other administrative and point of service systems.</i>	
	Click here to enter response.	
<b>8.1.2.</b>	<i>Which of the following capabilities are included with your System?</i>	
<b>8.1.2.1.</b>	Interfaces with Client's POS system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.2.</b>	Interfaces with Client's housing assignments system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.3.</b>	Interfaces with Client's menu management system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.4.</b>	Integrates and imports on a schedule from Client's enterprise records system and/or student information system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.5.</b>	Integrates with mobile parking and print solutions and with back-end access to declining balance accounts.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.6.</b>	Provides the ability to update interfaces as Client changes interfaced systems.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.7.</b>	Meets current and future PCI-DSS compliance standards.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.8.</b>	Allows for Client interdepartmental index charging/billing with uploading (or via API) to student information system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.9.</b>	Integrates with an online ordering and account management system with mobile accessibility.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.10.</b>	Provides a solution for tracking classroom attendance.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.1.2.11.</b>	Provides a solution for Summer Groups & Camps (such as a contactless wristband for access & board).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	





8.1.2.12.	Integrates with commercially available employee time and attendance management software and System capabilities.	<input type="checkbox"/> Yes <input type="checkbox"/> No
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[Click here to provide additional commentary, if necessary.](#)

8.1.3.	<p>Integrates with the following:</p> <ul style="list-style-type: none"> <li>i. Attended Food and Beverage Carts.</li> <li>ii. Event Attendance.</li> <li>iii. Equipment Check-out.</li> <li>iv. Bookstore.</li> <li>v. Campus Post Office.</li> <li>vi. Convenience Store.</li> <li>vii. Event Concessions.</li> <li>viii. Facility Access and Security.</li> <li>ix. Food Service.</li> <li>x. Health Center.</li> <li>xi. Library Circulation.</li> <li>xii. Payroll Deduction.</li> <li>xiii. Remote Retail Locations.</li> <li>xiv. Recreation Center.</li> <li>xv. Student Elections.</li> <li>xvi. Ticket Sales.</li> <li>xvii. Vending.</li> <li>xviii. Photocopiers.</li> <li>xix. Laundry.</li> <li>xx. Web Access.</li> <li>xxi. Print Management.</li> </ul> <p><b><u>Please provide a complete list of all the components which integrate with the System in the green comment box immediately below.</u></b></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
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[Click here to provide additional commentary, if necessary.](#)

8.1.4.	<b><i>Are the following YSU-specific interface requirements provided by your System?</i></b>	
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	<ul style="list-style-type: none"> <li>i. Integrates with Bosch Video Management System.</li> <li>ii. Interfaces with Ellucian Banner.</li> <li>iii. Interfaces e with StarRez Housing Management System (system of record for resident meal plans).</li> <li>iv. Interfaces with Barnes &amp; Noble Campus Bookstore POS system.</li> <li>v. Interfaces with PaperCut print management system.</li> <li>vi. Integrates with Webtrition nutrition system. <i>This integration is not defined as an immediate need but is for consideration when assessing future integrations.</i></li> <li>vii. Integrates with T2 parking management system. <i>This integration is not defined as an immediate need but is for consideration when assessing future integrations.</i></li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
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[Click here to provide additional commentary, if necessary.](#)



## 8.2. Attendance Tracking - Events

<b>8.2.1.</b>	<i>Describe your event attendance tracking system.</i>	
	<a href="#">Click here to enter response.</a>	
<b>8.2.2.</b>	<i>Which of the following event attendance tracking capabilities are provided by your System?</i>	
<b>8.2.2.1.</b>	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.2.</b>	Provides equivalent functionality with either existing or replacement activity readers.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.3.</b>	Works with mobile devices (such as Apple and Android) and PCs (web based).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.4.</b>	Reads magstripe, radio frequency identification (RFID), barcode, Bluetooth, proximity, or manual entry (such as name or ID number).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.5.</b>	Imports Patron data from enterprise system (data transfer), or manually from spreadsheet (such as .csv, .xps, etc).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.6.</b>	Exports Patron data to enterprise system (data transfer) or spreadsheet (such as .csv, .xps, etc).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.7.</b>	Allows Administrators to setup and control event parameters.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.8.</b>	Allows for event setup flexibility. Administrators can select event, location, selection at event/location.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.9.</b>	Allows Administrators a choice to display Patron information at time of transaction or remain private.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.10.</b>	Allows Administrators a choice to record Patron information or allow for anonymity at time of transaction.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.11.</b>	Allows for the selection of Patron "pass backs" from one, to no limit, and everything in between.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.12.</b>	Uses ID cards or mobile solutions for event attendance.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.13.</b>	Allows for the export of data through a system interface and direct database connection.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.14.</b>	Defines eligibility pools of Patrons eligible for an event.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.15.</b>	Supports multiple levels of security and accessibility within its database access.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.2.2.16.</b>	Provides remote, dedicated database support.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
8.2.2.17.	Provides direct database reporting.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.2.2.18.	Allows Clients to import enterprise data into system without Respondent assistance, after initial setup.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
<b>8.2.3. Are following YSU-specific requirements provided by your System?</b>		
<b>**YSU has no specific requirements for the System.**</b>		

### 8.3. Attendance Tracking - Classroom

8.3.1.	<i>Describe your classroom attendance tracking system.</i>	
	Click here to enter response.	
<b>8.3.2. Which of the following classroom attendance tracking capabilities are provided by your System?</b>		
8.3.2.1.	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.2.	Provides equivalent functionality with either existing or replacement activity readers.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.3.	Works with mobile devices (such as Apple and Android) and PCs (web based).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.4.	Reads magstripe, radio frequency identification (RFID), barcode, Bluetooth, proximity, or manual entry (such as name or ID number).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.5.	Imports Patron data from enterprise system (data transfer), or manually from spreadsheet (such as .csv, .xps, etc).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.6.	Exports Patron data to enterprise system (data transfer) or spreadsheet (such as .csv, .xps, etc).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.7.	Allows Administrators to setup and control classroom attendance parameters.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.8.	Allows for setup flexibility. Administrators can select class, location, selection at class/location.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.9.	Allows Administrators a choice to display Patron information at time of transaction or remain private.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.10.	Allows Administrators a choice to record Patron information or allow for anonymity at time of transaction.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.11.	Allows for the selection of Patron "pass backs" from one, to no limit, and everything in between.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.12.	Uses ID cards or mobile solutions for classroom attendance.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
8.3.2.13.	Allows for the export of data through a system interface and direct database connection.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.14.	Defines eligibility pools of Patrons eligible for a class.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.15.	Supports multiple levels of security and accessibility within its database access.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.16.	Provides remote, dedicated data support.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.17.	Provides direct database reporting.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.2.18.	Allows Clients to import enterprise data into system without Respondent assistance, after initial setup.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.3.3.	<b><i>Are following YSU-specific requirements provided by your System?</i></b>	
	<b><i>**YSU has no specific requirements for the System.**</i></b>	

## 8.4. Dining/Meal Plans

8.4.1.	<b><i>Describe how your System manages dining &amp; meal plans.</i></b>	
	Click here to enter response.	
8.4.2.	<b><i>Which of the following dining/meal plan capabilities are provided by your System?</i></b>	
8.4.2.1.	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.4.2.2.	Configures, processes, and administers both meal plans (board plan) and point plans (stored value/credit).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.4.2.3.	Configures and edits configuration for maximum/minimum balance, allowable locations, plan name, applicable discount codes, plan priority, and low balance alerts to cardholder.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.4.2.4.	Provides the ability for all plans (such as meal plans & point plans) to be Administrator-configured as increasing balance or decreasing balance plans at discretion of Administrator based on operational needs.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.4.2.5.	Includes a process for adding, removing, and adjusting meal plans and point plans by batch import and manually.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.4.2.6.	Changes/swaps dining plans on a Patron record, manually or by subroutine.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	



8.4.2.7.	Adds value to balance (deposit) manually or by batch import or web interface.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.8.	Deducts value from balance (withdraw) manually or by batch import.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.9.	Removes dining plan from patron without deleting Patron manually or by batch import.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.10.	Offers flexibility for plan setups, and reconfiguring plans as required to fit business need.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.11.	Restricts admin users with proper departmental access.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.12.	Restricts which readers can accept an account.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.13.	Restricts days of week and/or times of day during which an account can be used.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.14.	Restricts use of a meal account to specific meal period(s) with specified limits for each period.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.15.	Sets a start date for when an account goes active.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.16.	Sets an end date for when an account goes inactive.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.17.	Sets an account to reset to a specified amount on daily, weekly, monthly, quarterly, bi-annually, annual basis.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.18.	Automatically sets balances to zero for increasing balance plans on the 1st of each month.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.19.	Displays transaction history online.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.20.	Displays current balances online.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.21.	Displays the remaining balance after every transaction.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.22.	Sets anti-passback rules.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.23.	Counts based meal plans divided into block plans (e.g. 7, 14, 21 meals).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.24.	Transfers data into custom fields for misc. functions already in place for Client.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.25.	Defines if an account can go negative.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.26.	Defines how much an account can go negative for any reason.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	



8.4.2.27.	Define if/how much an account can go negative from offline transactions.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.28.	Sets custom reader response messages for each account.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.29.	Provides the ability to add, remove, edit and adjust all meal plans and balances manually and via direct import from Colleague.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.30.	Supports tender search chain functionality to satisfy any transaction.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.2.31.	Fully integrates with the card production software.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.4.3.	<b><i>Are following YSU-specific requirements provided by your System?</i></b>	
	<b><i>**YSU has no specific requirements for the System.**</i></b>	

## 8.5. Equipment Checkout

8.5.1.	<b><i>Describe how your System enable equipment checkout.</i></b>	
	<a href="#">Click here to enter response.</a>	
8.5.2.	<b><i>Which of the following equipment checkout capabilities are provided by your System?</i></b>	
8.5.2.1.	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.5.2.2.	Maintains a list of inventory items available for cardholder checkout. Items might include athletic equipment (such as badminton nets, volleyballs, etc.), residence hall equipment (such as TV/DVD, vacuum, etc.), foodservice equipment (such as a grill), or other college property (such as college owned vehicles). <b><u>Please include if your Systems presents any limitations as to the number of items or type of items it can track with its equipment checkout capabilities in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.5.2.3.	Performs equipment checkout from any user workstation (PC running system administration software) or attended card reader.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
8.5.2.4.	Maintains inventory numbers for items including: <ul style="list-style-type: none"> <li>i. Track total quantity.</li> <li>ii. Number available.</li> <li>iii. Number out of service.</li> <li>iv. Optional ability to track serial numbers per item.</li> <li>v. Support standard equipment reporting through the user interface without requiring additional vendor required programming.</li> <li>vi. Ability to report which items are checked out by which patron and when they were checked out.</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No





	Please provide a list of other inventory items tracked by the System in the green comment box immediately below in the green comment box immediately below.	
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.5.3.</b>	<i>Are following YSU-specific requirements provided by your System?</i>	
	<b>**YSU has no specific requirements for the System.**</b>	

## 8.6. Laundry Reservation

<b>8.6.1.</b>	<i>Describe how your System enables laundry reservations.</i> Include how your System would integrate with various laundry equipment. Be sure to indicate the number of laundry machines (washers and dryers) that can be supported by each laundry reader.	
	<a href="#">Click here to enter response.</a>	
<b>8.6.2.</b>	<i>Which of the following laundry reservation capabilities are provided by your System?</i>	
<b>8.6.2.1.</b>	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.6.2.2.</b>	Provide the ability for patron to view machine availability, reserve machines, receive notification when machines become available, and receive notifications via email, phone, and text message when machine cycle is complete.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.6.2.3.</b>	Provides the ability to establish limits and timeframes including: <ul style="list-style-type: none"> <li>i. The number of washers and dryers that can be reserved at one time.</li> <li>ii. The number of outstanding reservations each student can have.</li> <li>iii. The length of time allowed for reservations windows (i.e., how soon after the reserved time does the machine become available if the reservation is not used).</li> <li>iv. How long to "hold" machines when searching for machines to reserve.</li> <li>v. How far in advance a reservation can be made.</li> <li>vi. The minimum amount of time between reservations.</li> </ul> <u>Provide a complete list of limits and timeframes that are controlled by the System in the green comment box immediately below in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.6.3.</b>	<i>Are following YSU-specific requirements provided by your System?</i>	
	<b>**YSU has no specific requirements for the System.**</b>	

## 8.7. Off-Campus Vending

<b>8.7.1.</b>	<i>Please describe how your System would integrate with off-campus vending.</i>
	<a href="#">Click here to enter response.</a>



<b>8.7.2.</b>	<i>Which of the following off-campus vending capabilities are provided by your System?</i>	
<b>8.7.2.1.</b>	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.7.2.2.</b>	Allows for off campus advantages such as a program where participating local merchants accept the ID card as payment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.7.2.3.</b>	Allows for local control of off-campus vendor arrangements, including promotion, selection, and management of vendors.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.7.2.4.</b>	Allows the User to pay for purchases with mobile ID/credential.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.7.2.5.</b>	Uses different methods of access (such as mobile, web-based, or both).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.7.2.6.</b>	Accepts MasterCard, Visa, American Express, Discover, ACH, mobile (such as Apple Pay, Samsung Pay, Google Pay, etc.), and online (such as bitcoin, PayPal, Venmo, Zelle, etc.) transactions for payments.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.7.2.7.</b>	Requires specific hardware to facilitate off-campus vending.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>8.7.3.</b>	<i>Are the following YSU-specific off-campus vending requirements provided by your System?</i>	
	i. Offers a fully managed solution i.e. contracts issuing equipment and starting and ending service with vendors.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	

## 8.8. Online Web-Based Ordering System

<b>8.8.1.</b>	<i>Describe your online web-based ordering system.</i> Describe how the System handles online food and beverage ordering?	
	<a href="#">Click here to enter response.</a>	
<b>8.8.2.</b>	<i>Describe the different options available for management (such as managed, unmanaged, and Client-managed) of the online web-based ordering system.</i>	
	<a href="#">Click here to enter response.</a>	
<b>8.8.3.</b>	<i>Describe who is responsible for the programming of online web-based ordering system (Respondent, Client, or Administrator).</i> How is the programming completed?	
	<a href="#">Click here to enter response.</a>	



<b>8.8.4.</b>	<i>Provide examples of installations using an online ordering system</i>	
Click here to enter response.		
<b>8.8.5.</b>	<i>Which of the following online web-based ordering capabilities are provided by your System?</i>	
<b>8.8.5.1.</b>	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.2.</b>	Interfaces with other point of sale equipment to complete orders.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.3.</b>	Provides the ability to order food through a web page and select a pickup time.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.4.</b>	Allow cardholders to determine "favorites".	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.5.</b>	Provides the ability to perform back-of-the-house functions (such as order ticket printing, order viewing, as well as statistical and administrative functions). <b>Provide a complete list of the back-of-the-house functions the System can perform in the green comment box immediately below.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide a complete list of back-of-the-house functions.		
<b>8.8.5.6.</b>	Integrates into the proposed POS solution for purposes of order flow management and enterprise wide reporting requirements.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.7.</b>	Provides the ability to pay for orders placed online. This activity should be supported through the proposed transaction processing system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.8.</b>	Supports POS kiosk access for use in student centers, dining halls, and other large food courts.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.9.</b>	Provides the Patron the ability to order food through a web page or app and select a pickup time.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.10.</b>	Provides the Patron the ability to determine "favorites".	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.5.11.</b>	Includes the ability to be integrated into the proposed POS solution for purposes of order flow management and enterprise wide reporting requirements.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
<b>8.8.6.</b>	<i>Are the following YSU-specific online web-based ordering requirements provided by your System?</i>	
	ii. Offers a fully managed off-campus vendor program.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		

## 8.9. Parking & Transit

<b>8.9.1.</b>	<i>Describe your parking &amp; transit system.</i>
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Click here to enter response.		
8.9.2.	<i>Provide a list of the ID card system features that integrate the System into campus parking and transit systems.</i>	
Click here to enter response.		
8.9.3.	<i>Which of the following parking &amp; transit functions/capabilities are provided by your System?</i>	
8.9.3.1.	Charges ID cards from parking and other Client systems.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.9.3.2.	Integrates and transacts with on-campus transit systems.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.9.3.3.	Integrates and transacts with public transit system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.9.4.	<i>Are following YSU-specific requirements provided by your System?</i>	
<b>**YSU has no specific requirements for the System.**</b>		

## 8.10. Vending & Copier Controllers

8.10.1.	<i>Describe how your system works with vending &amp; copier controllers. Describe how the System facilitates online photocopy vending.</i>	
Click here to enter response.		
8.10.2.	<i>Which of the following vending &amp; copier controller functions/capabilities are provided by your System?</i>	
8.10.2.1.	Uses non-proprietary, industry-standard equipment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.10.2.2.	Provides the ability for photocopy vending to be conducted online and on-site.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.10.2.3.	Provides options for a card vending device with the ability to dispense non-ID card system cards. <b><u>Describe the card vending hardware options available with the System in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.10.2.4.	Accepts cash and credit cards for payment.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.10.2.5.	Works with mobile devices (such as Apple and Android) and PCs (web based).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.10.2.6.	Reads magstripe, RF, barcode, Bluetooth, proximity, or manual entry (name or ID number).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.10.2.7.	Offers vending and copier controllers that allow ID card system and non-ID card system Patrons, with stored value, to purchase vending items and copies.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
8.10.2.8.	Provides vending options for selling office sundries. Must accept stored value from ID cards and preferably credit cards for payment. <u>Describe the available hardware options available with the System in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.10.2.9.	Provides an ID card system interface with existing vending infrastructure (such as those provided by Pepsi Co. or other major electronic vending companies) that uses the System's cards to make purchases at existing machines without hardware changes. <u>Describe how this is accomplished in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
8.10.3.	<i>Are following YSU-specific requirements provided by your System?</i>	
	<b>**YSU has no specific requirements for the System.**</b>	

## Section 9. Environment & Availability

### 9.1. Hosting

9.1.1.	<i>Describe the hosting options available through your System.</i>	
	Click here to enter response.	
9.1.2.	<i>Describe your communication process for expected or unexpected outages due to upgrades, scheduled maintenance, and issues.</i>	
	Click here to enter response.	
9.1.3.	<i>Which of the hosting of the following are including in your hosting system?</i>	
9.1.3.1.	Offers an entirely cloud-based SaaS platform.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.2.	Provides the ability to host the System on campus	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.3.	Provides US based hosting.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.4.	Provides optional integration of local servers which would work on virtualized operating systems.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.5.	Meets or exceeds industry-standard uptime of 99.999%.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.6.	Guarantees industry standard availability levels of 99.999%. <u>Provide the availability levels guaranteed by the hosting system in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.7.	Operates online, in real time, 24 hours a day, 7 days a week.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
9.1.3.8.	Does not require shutdowns to perform functions (such as system backups, generation of reports, etc.).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.9.	Provides on-going PCI DSS security certification and maintain National Institute of Standards and Technology (NIST) standards.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.10.	Provides sub-second transaction response time regardless of hosting option, system loading, time of day, etc..	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.11.	Provides ability to host campus card system off campus in a secure, private cloud.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.12.	Includes virtual, redundant servers, firewalls, switches and load balancers.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.13.	Stores data in a database environment with primary and active redundant databases.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.14.	Includes geographic redundancy.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.15.	Provides security-heavy framework with encryption for all data.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.16.	Provides 24/7 intrusion detection monitoring.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.17.	Detects and reports unauthorized attempts to use an invalid ID card.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.18.	Provides weekly independent security scanning.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.19.	Includes SAS70 audits.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.20.	Provides automatic back-up with physical off-site storage.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.21.	Provides online access to all transactional history.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.22.	Supports virtual machines. <b><u>Please note below if dedicated server hardware is required in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.23.	Tests environments for non-production testing and training to be included with license.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.24.	Offers formal release of software updates and upgrades. These should separate from development, test, and production environments.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.25.	Deploys architecture for production, development, testing and training environments.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.26.	Includes push notification of system errors.	<input type="checkbox"/> Yes <input type="checkbox"/> No





	Click here to provide additional commentary, if necessary.	
9.1.3.27.	Provides the ability to rollback at Client's discretion in event of system error/failure during patches or upgrades.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.28.	Offers the following real-time performance monitoring and notification: <ul style="list-style-type: none"> <li>i. Network connectivity.</li> <li>ii. Databases.</li> <li>iii. Server hardware and internal processes.</li> <li>iv. Connectivity to third party systems and readers.</li> </ul> <u>Provide a complete list of the components of your System that are subject to real-time performance monitoring and notification in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.29.	Offers disaster recover fail over with sub-second processing. Proof of testing of this is required.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.30.	Ensures that information/data deleted from the product is also deleted from the product database.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.31.	Complies with the accepted industry standards for web-based products and services features (WCAG 2.0 Level AA). <u>Include the following documentation in the green comment box immediately below:</u> <ul style="list-style-type: none"> <li>i. Description of complying features.</li> <li>ii. Description of how features conform to WCAG 2.0 Level AA</li> </ul>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.32.	Provides third-party verification of Voluntary Product Accessibility Template (VPAT) (preferred), or other confirmation of WCAG 2.0 Level AA compliance. <u>If your VPAT is based on an alternative screen reader software, and/or internet browser, include the name of the software/browser in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.33.	Discloses noncomplying features. <u>Provide a complete list of feature(s) and issue(s) that are noncompliance and a roadmap with timeframe for achieving compliance in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.34.	Includes an accessibility roadmap for the System.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.35.	Provides an accessibility testing process for code reviews, evaluations with accessibility checking software, testing with assistive technologies, testing by users with disabilities, etc. <u>Provide a complete list of the components of the System that are subject to accessibility testing in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.36.	Provides internal accessibility standards and how compliance is ensured/measured.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.3.37.	Employs or contracts a designer/developer with experience coding the product for accessibility and achieving accessibility standards.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.1.4.	<b>Are the following YSU-specific hosting requirements provided by your System?</b>	

	i. Provides an entirely cloud-based SaaS platform.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		

## 9.2. Visitor Registration

<b>9.2.1.</b>	<i>Describe how your system manages and administers visitor registration.</i>	
<a href="#">Click here to enter response.</a>		
<b>9.2.2.</b>	<i>Which of the following visitor registration capabilities are provided by your System?</i>	
<b>9.2.2.1.</b>	Provides the ability for each residence hall to be able to register and track visitors and guests.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
<b>9.2.2.2.</b>	<p>Provides the following features available within the visitor check-in system should include, but not be limited to:</p> <ul style="list-style-type: none"> <li>i. Web-based interface.</li> <li>ii. Scanning of student ID.</li> <li>iii. Driver's license scanning.</li> <li>iv. On-site list.</li> <li>v. Provides automatic text message and/or email notification of guests that haven't checked out in a specified time period.</li> <li>vi. Creates overnight visits.</li> <li>vii. Issues a temporary visitor card.</li> </ul> <p><b><u>Provide a complete list of features available within the visitor check-in system in the green comment box immediately below.</u></b></p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
<b>9.2.2.3.</b>	Fully integrates with the card production and access control software.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>9.2.3.</b>	<i>Are following YSU-specific requirements provided by your System?</i>	
<b>**YSU has no specific requirements for the System.**</b>		



### 9.3. Host System Architecture

9.3.1.	<i>Describe your host system architecture.</i>	
Click here to enter response.		
9.3.2.	<i>Describe your host system's hardware configuration.</i> Include a list of all component and specifications required in the proposed host system.	
Click here to enter response.		
9.3.3.	<i>In layman's terms, provide a summary of your company's privacy policy.</i>	
Click here to enter response.		
9.3.4.	<i>Which of the following host system architecture capabilities are include the System?</i>	
9.3.4.1.	Integrates with Microsoft Windows or Linux operating system for the server. Includes the option that a compatible server can be provided the Client.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.2.	Integrates with multiple operating systems for administrative workstations including supported versions of Microsoft Windows or Apple macOS/iOS operating systems.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.3.	Supports an unlimited cardholder database. <b><u>Describe your approach to licensing with respect to cardholder database size in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.4.	Does not sell data retrieved or recorded by the System.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.5.	Provides message-based TCP/IP communication architecture.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.6.	Offers an open database connectivity (ODBC) compliant database.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.7.	Provides volume fault tolerance through use of enterprise-grade RAID standards	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.8.	Processes transactions online.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.9.	Provides real-time interfaces to other systems via the network backbone.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.10.	Expands to support unlimited number of online card-reading devices	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.11.	Provides a transaction rate and response time less than 2 seconds.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
9.3.4.12.	Schedules automated network or tape backup process without interrupting the on-line operation of the System.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
9.3.4.13.	Maintains full operation of all crucial host functions for 20 minutes or more in the event of a loss of utility power and managing orderly shutdown of system through Smart UPS protection.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.3.4.14.	Enables online reporting and system management capability from any workstation.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.3.4.15.	Provides ability to notify Administrators in the event of a system event failure such as end of day. Notification should be available at a minimum via e-mail. <b><u>Provide a complete list of the different mediums compatible with the System for sending communications to Administrators in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.3.4.16.	Provides ability to notify Patrons in the event of a system event failure such as end of day. Notification should be available at a minimum via e-mail. <b><u>Provide a complete list of the different mediums the System offers for sending communications to Patrons in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.3.5.	<i>Are following YSU-specific requirements provided by your System?</i>	
	<b>**YSU has no specific requirements for the System.**</b>	

## 9.4. Security

9.4.1.	<i>Describe how your Systems ensures a secure environment.</i>	
	Click here to enter response.	
9.4.2.	<i>Describe the security system's hosting model(s) and provide details of any sub-contractors involved in providing the hosted service.</i>	
	Click here to enter response.	
9.4.3.	<i>Which of the following capabilities are included as a part of your System's security system?</i>	
9.4.3.1.	Provides a PCI Point-to-Point Encryption (P2PE) solution certified by the PCI Security Standard Council.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.4.3.2.	Documents third-party verification of SOC 2 Type I and SOC 2 Type II audit and compliance.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
9.4.3.3.	Provides a diagram and/or description of the hosting infrastructure and network architecture, including routers, firewalls, and servers (including their purpose), detailing all application tiers (Web server, application server, database server), how the tiers are separated and, ultimately, how secure connectivity to the Internet is achieved. <b><u>Provide an example of the diagram and/or description your company offers as described above.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	



9.4.3.4.	Ensures the web application and hosting infrastructure are tested for security vulnerabilities at least quarterly. Describe your web application and hosting infrastructure testing and <b>provide details of when the last assessment took place and how regularly they occur. If applicable, share the results of these security tests in the green comment box immediately below.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
9.4.3.5.	Describe your best practices to safeguard: <ul style="list-style-type: none"> <li>i. Access to the system (network security).</li> <li>ii. Access within the system (application security).</li> <li>iii. Data stored within the system (database security).</li> <li>iv. Access to the facility (physical security).</li> <li>v. Import/export security (safeguard data while in transit).</li> <li>vi. Data transmitted by disk, tape, or over the internet through encryption.</li> <li>vii. Customer data in any non-production environment (e.g. training or testing).</li> </ul> <b>Provide a complete list of functions and items safeguarded by the System in the green comment box immediately below.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
9.4.3.6.	Adheres to a deployment process for software updates, security patches, and endpoint protection software signatures.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
9.4.3.7.	Adheres to policies and procedures for handling a breach of data.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
9.4.3.8.	Provides monitoring procedures and tools used for monitoring the integrity and availability of the systems interacting with the proposed product, detecting security incidents, and ensuring timely remediation.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
9.4.3.9.	Adheres to policies for limiting and/or controlling employee access to customer data.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
9.4.3.10.	Adheres to industry-standard data handling and security practices during hardware decommissioning.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		
9.4.4.	<b>Are the following YSU-specific security requirements provided by your System?</b>	
	i. Employs the use of Web Application Firewalls (WAFs) and Next-Generation Anti-Virus (NGAV)	<input type="checkbox"/> Yes <input type="checkbox"/> No
<a href="#">Click here to provide additional commentary, if necessary.</a>		



## Section 10. Implementation & Ongoing Support

### 10.1. Methodology & Personnel

10.1.1.	<i>Describe your project management process or methodology.</i> Provide an implementation plan for this project, including a timeline for start and completion of the various services, as well as an overall time for completion.	
Click here to enter response.		
10.1.2.	<i>Identify the key team members to be assigned to this project.</i> Provide their biographies and list no fewer than three recent projects as references for each member. Include the role and a description for each member of your implementation and support teams.	
Click here to enter response.		
10.1.3.	<i>Describe how scope creep and sliding deliverables are handled.</i>	
Click here to enter response.		
10.1.4.	<i>Specify resources (skill level and time estimates) the Client is required to provide, including expectations and responsibilities.</i>	
Click here to enter response.		
10.1.5.	<i>Describe your proposed system's ability/inability to allow the import and export of legacy data by the Client's technical staff.</i>	
Click here to enter response.		
10.1.6.	<i>Describe how your Systems migrates or manages the transfer of data from the legacy system to your System.</i>	
Click here to enter response.		
10.1.7.	<i>Which of these statements describes your implementation methodology?</i>	
10.1.7.1.	Requires a test environment of the proposed system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
10.1.7.2.	Provides professional services to migrate student data from the legacy system, to your proposed system.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
10.1.8.	<i>Confirm your ability to deliver the following YSU-specific requirements implementation timeline and phases as described below.</i>	
10.1.8.1.	Youngstown State University Project Timeline Youngstown State University and/or Kilcawley Center will be closed from Tuesday, December 24, 2019 through Wednesday, January 1, 2020.	<input type="checkbox"/> Yes <input type="checkbox"/> No





	<table border="1"> <thead> <tr> <th>Time Period</th> <th>Project Phase</th> </tr> </thead> <tbody> <tr> <td>Monday, December 16, 2019 through Friday, December 20, 2019</td> <td>Hardware delivery and installation of all hardware and software</td> </tr> <tr> <td>Thursday, January 2, 2020 through Friday, January 10, 2020</td> <td>Training &amp; Soft Launch – YSU staff and Chartwells Dining Services staff</td> </tr> <tr> <td>Monday, January 13, 2020</td> <td>Rollout and going live with new system</td> </tr> </tbody> </table>	Time Period	Project Phase	Monday, December 16, 2019 through Friday, December 20, 2019	Hardware delivery and installation of all hardware and software	Thursday, January 2, 2020 through Friday, January 10, 2020	Training & Soft Launch – YSU staff and Chartwells Dining Services staff	Monday, January 13, 2020	Rollout and going live with new system	
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Monday, January 13, 2020	Rollout and going live with new system									
Click here to provide additional commentary, if necessary.										
10.1.8.2.	<i>Perform migration of a minimum of twelve (12) months of historical student data (e.g., student name, ID, meal plan, account balance, and transactions history).</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No								
Click here to provide additional commentary, if necessary.										
10.1.8.3.	<i>Perform migration of a minimum of twelve (12) months of historical student data (e.g., student name, ID, meal plan, account balance, and transactions history). Data migration must be done (60) days prior to the system GO LIVE as part of implementation and configuration activities.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No								
Click here to provide additional commentary, if necessary.										

## 10.2. Customer Support

10.2.1.	<i>Describe your approach to ongoing technical and functional training for all components of your System.</i> Describe the general company ongoing maintenance and support policy. explain ongoing maintenance and support for the proposed software and hardware options. Describe the training provided for all essential personnel on the use and administration of the proposed campus card system.
Click here to enter response.	
10.2.2.	<i>Describe your Service Level Agreements (SLA) along with your and, if applicable, your partner's level of response.</i> In your response, include the available levels of post-implementation support and a description of what each level contains.
Click here to enter response.	
10.2.3.	<i>Describe the process for the logging and resolution of bugs and errors.</i>
Click here to enter response.	
10.2.4.	<i>Describe the resolution process for customer reported issues, including escalation processes and key personnel.</i>
Click here to enter response.	
10.2.5.	<i>Define the availability of custom development services.</i>
Click here to enter response.	



<b>10.2.6.</b>	<i>Which of the following training and support capabilities are included with your System?</i>	
<b>10.2.6.1.</b>	Provides adequate documentation and extensive online help/knowledge base.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.2.</b>	Includes licensing and support fees in the "Pricing Proposal" section of your proposal.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.3.</b>	Includes free vendor-developed software updates once a year or more as part of any ongoing maintenance package.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.4.</b>	Provides a response time of less than 24 hours from the time the problem was reported for on-site service is necessary. The continuous functioning of the system should be considered a high support priority.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.5.</b>	Delivers replacement devices within 24 hours of the reported failure. <b><u>If no, indicate the turnaround time for replacement of malfunctioning devices in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.6.</b>	Employs a "train the trainer" approach to the support of the System. <b><u>If yes, identify the training required for the trainer and the recommended number of trainers for a campus environment in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.7.</b>	Includes access to around the clock phone, fax, and remote troubleshooting (such as WebEx) support 365 days a year.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.8.</b>	Provides access to the System's manuals and training documents on the web.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.9.</b>	Offers additional training or certification programs. <b><u>Provide a complete list of the additional training options in the green comment box immediately below.</u></b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.10.</b>	Provides accessibility of product support documentation for individuals with disabilities.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.11.</b>	Provides post-implementation maintenance and support for all portions of your System.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.12.</b>	Includes upgrades as part of the annual maintenance agreement, including bug fixes and patches.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.6.13.</b>	Provides phone support 24/7/365 for Business Office Staff issues.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
<b>10.2.7.</b>	<i>Does your customer support include any of the following capabilities?</i>	
<b>10.2.7.1.</b>	Offers the ability to contact card system customer support 24/7/365 via live chat, telephone and email (phone support is imperative in case of system failure or other major emergency issues that may arise throughout the year).	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	



10.2.7.2.	Offers the ability login to an online support portal for access to up-to-date card system documentation, knowledge base access, trouble ticketing, invoicing and card system enhancement request submission and tracking.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
10.2.7.3.	Provides documentation regarding the new system, including but not limited to user guides, system admin manuals, release notes, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
10.2.7.4.	Provides a support staff with, minimally, 5 years of experience in campus card program administration.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
10.2.8.	<i>Are following YSU-specific requirements provided by your System?</i>	
	<b>**YSU has no specific requirements for the System.**</b>	

### 10.3. Local Hardware Support

10.3.1.	<i>Describe your System's local hardware support.</i>	
	<a href="#">Click here to enter response.</a>	
10.3.2.	<i>Does your local hardware support include any of the following capabilities?</i>	
10.3.2.1.	Local hardware support with a specific response time and support is offered 24 hours a day, 7 days a week, 365 days a year with a client portal site and a knowledge base library of articles	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
10.3.2.2.	If available, proposer shall provide the individual or firms (office phone, email, cell) as well as a proposed minimum response time	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
10.3.3.	<i>Are following YSU-specific requirements provided by your System?</i>	
	<b>**YSU has no specific requirements for the System.**</b>	

### 10.4. User Group

10.4.1.	<i>Please describe your System's user group/customer forum options.</i>	
	<a href="#">Click here to enter response.</a>	
10.4.2.	<i>Which of the options are available to the User Group?</i>	
10.4.2.1.	Hosts annual user group conferences. <u>Please describe the benefits of your annual conference to your customers and how product enhancements come about in the green comment box immediately below.</u>	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
10.4.2.2.	Catalogs online documentation.	<input type="checkbox"/> Yes <input type="checkbox"/> No



	Click here to provide additional commentary, if necessary.	
10.4.2.3.	Offers a user community list serve.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
10.4.2.4.	Offers a user community forum.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Click here to provide additional commentary, if necessary.	
10.4.3.	<i>Are following YSU-specific requirements provided by your System?</i>	
	<i>**YSU has no specific requirements for the System.**</i>	

## Section 11. Additional System Features & Other Offerings

### 11.1. Other System Offerings

11.1.1.	<i>Describe any functions of the System your company offers that have not been addressed in our specifications. Include additional features as a part of your response, including other aspects, and functionality of the System that may not have been addressed in the requirements, but may be of interest for the Issuers to consider.</i>
Click here to enter response.	
11.1.2.	<i>Which of the following product interfaces are also available with the System?</i>
11.1.2.1.	Judicial conduct process management <input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.	
11.1.2.2.	Foodservice management <input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.	
11.1.2.3.	Catering management (including web accessibility) <input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.	
11.1.2.4.	Nutritional accounting <input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.	
11.1.2.5.	Campus broadcast notification system <input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.	
11.1.2.6.	Tutor management <input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.	
11.1.3.	<i>Are following YSU-specific requirements provided by your System?</i>
<b>**YSU has no specific requirements for the System.**</b>	

### 11.2. Other Offerings

11.2.1.	<i>Describe any other products or services your company offers outside of those addressed in our specifications. Identify and describe any other products and services your company offers outside the scope of this RFP. Your response(s) may be completely unrelated to the Campus Card System.</i>
Click here to enter response.	

## Section 12. Partnering with Sourcing Alliance

### 12.1. Respondent Organizational Structure & Staffing of Sourcing Alliance Relationship

12.1.1.	<b>Primary Point of Contact for Sourcing Alliance.</b> Who is the individual that will serve as Sourcing Alliance's primary point of contact for developing and implementing a go-to-market strategy to increase Program participation by local governments and educational institutions across the country? Include the individual's name, title, a description of their role, and a resume or biography.
Click here to enter response.	
12.1.2.	<b>Key Staff.</b> Provide the names, roles, and tenure with the company of other key staff members who will be working with Sourcing Alliance in such areas as sales management, field sales, marketing, collateral development and approval, accounting, and reporting.
Click here to enter response.	
12.1.3.	<b>Organizational Chart.</b> Provide an organizational chart describing the roles and reporting relationships of senior management and departments or divisions within your company.
Click here to enter response.	
12.1.4.	<b>Sales Organization.</b> Provide a description of your sales organization, including key staff members, the size of the organization, in-house vs. third-party sales resources, geographic territories, vertical market segmentation, segmentation by account size, inside sales, field sales, and how sales representatives are compensated (e.g., on gross revenue, profitability, or some other formula).
Click here to enter response.	
12.1.5.	<b>Driving Program Participation &amp; Revenue.</b> A piggybackable master agreement with Sourcing Alliance provides your company with an opportunity to win new and renew existing local government and educational institution business through an exemption to the traditional bid/RFP process. In other words, public sector entities that want to purchase your company's products and services can do so without having to conduct a bid or RFP. Describe your company's vision and strategy to leverage a piggybackable master agreement with Sourcing Alliance to win local government and educational institution business over the next five years.
Click here to enter response.	
12.1.6.	<b>Driving Program Participation &amp; Revenue.</b> What geographies and vertical markets will be targeted and in what timeframe?
Click here to enter response.	
12.1.7.	<b>Driving Program Participation &amp; Revenue.</b> How will the piggybackable master agreement be rolled out with your public sector sales team?
Click here to enter response.	





12.1.8.	<b>Driving Program Participation &amp; Revenue.</b> How will your sales team be incentivized to leverage the Sourcing Alliance piggybackable master agreement?
Click here to enter response.	
12.1.9.	<b>Driving Program Participation &amp; Revenue.</b> What are your revenue objectives in each of the five years of the piggybackable master agreement?
Click here to enter response.	
12.1.10.	<b>Driving Program Participation &amp; Revenue.</b> What is your strategy for winning new business under the Sourcing Alliance exemption from traditional bid/RFP processes?
Click here to enter response.	
12.1.11.	<b>Driving Program Participation &amp; Revenue.</b> What is your strategy for retaining existing business under the Sourcing Alliance exemption from traditional bid/RFP processes?

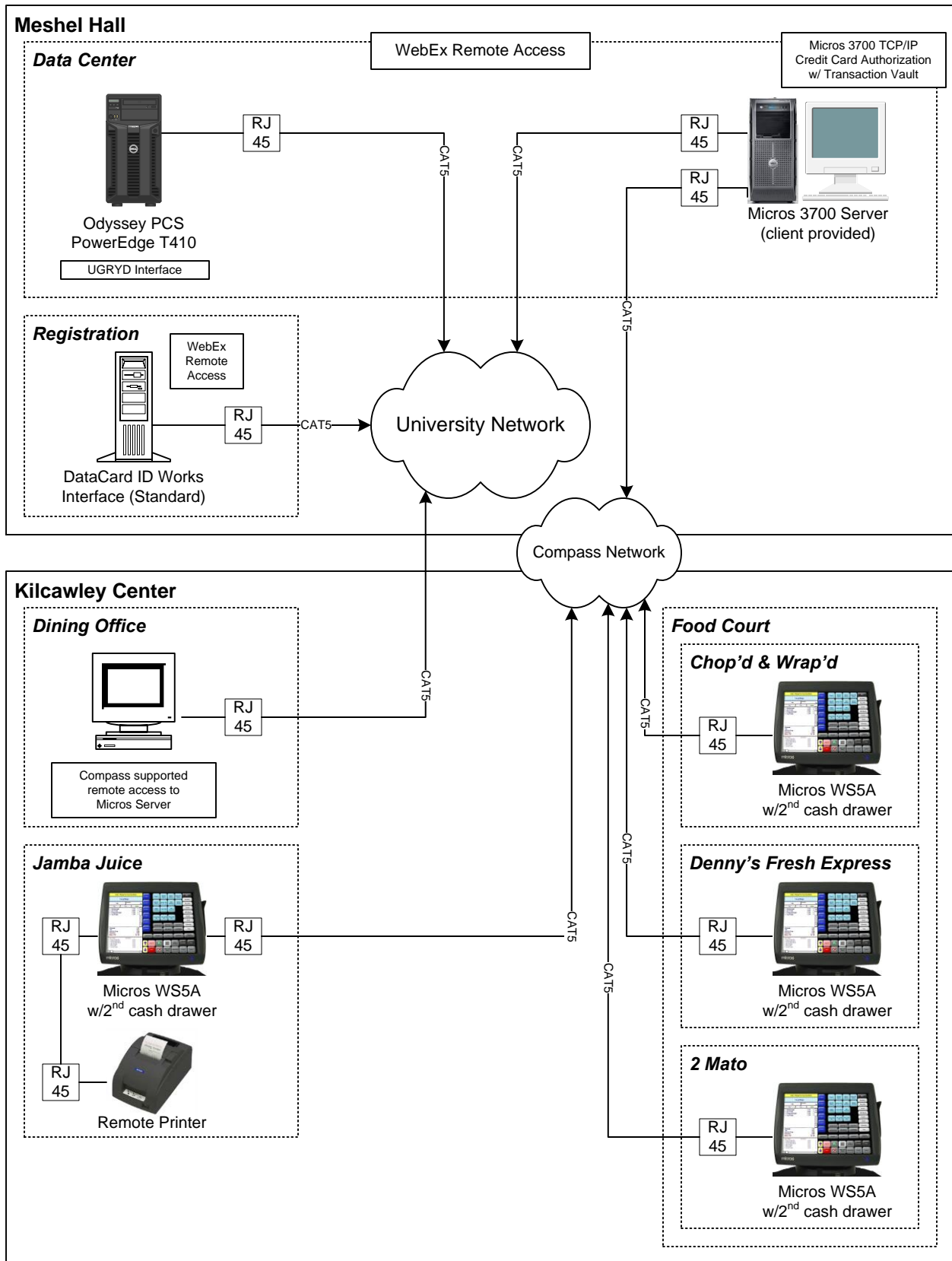
## 12.2. Sourcing Alliance Administrative Fee & Reporting

12.2.1.	<b>Administrative Fee.</b> Sourcing Alliance generates revenue as a percentage of the Winning Supplier's revenue from local government and educational institutions purchasing products and services from Winning Supplier through the piggybackable master agreement between the Winning Supplier and Sourcing Alliance. The Administrative Fee is designed to align the interests of the Winning Supplier and Sourcing Alliance – Sourcing Alliance only generates revenue when the Winning Supplier generates revenue based on Program utilization by current and future Sourcing Alliance Members. The Administrative Fee for this Program is three percent (3%) of the Winning Supplier's Program revenue, payable upon invoice issued by the Winning Supplier to participating Sourcing Alliance Members. Confirm that, if selected as the Winning Supplier of this RFP process, Respondent agrees to this Administrative Fee structure.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
12.2.2.	<b>Shared Marketing Costs.</b> Sourcing Alliance will work closely with the Winning Supplier to design Program marketing campaigns to current and potential Members across the country. These campaigns may include the development, production, and distribution of marketing collateral, acquiring prospect contact information, attending trade shows, and other typical marketing expenses. All out-of-pocket marketing expenses will be identified as part of the design of each marketing campaign, and each marketing campaign must be approved by both the Winning Supplier and Sourcing Alliance prior to implementation. The out-of-pocket costs for each marketing campaign are split equally between the Winning Supplier and Sourcing Alliance and paid to the party incurring the out-of-pocket expenses upon invoice. Confirm that, if selected as the Winning Supplier of this RFP process, Respondent agrees to share equally in the cost of any agreed upon out-of-pocket expenses as described herein	<input type="checkbox"/> Yes <input type="checkbox"/> No
Click here to provide additional commentary, if necessary.		
12.2.3.	<b>Sales &amp; Administrative Fee Reporting.</b> Sourcing Alliance requires reports detailing sales invoiced the prior month and associated Administrative Fees earned by the 15 <sup>th</sup> of the month, and reports detailing the prior calendar year's sales invoiced and Administrative Fees earned within thirty (30) days following the end of the calendar year. Confirm that your company will meet or exceed this reporting schedule.	<input type="checkbox"/> Yes <input type="checkbox"/> No

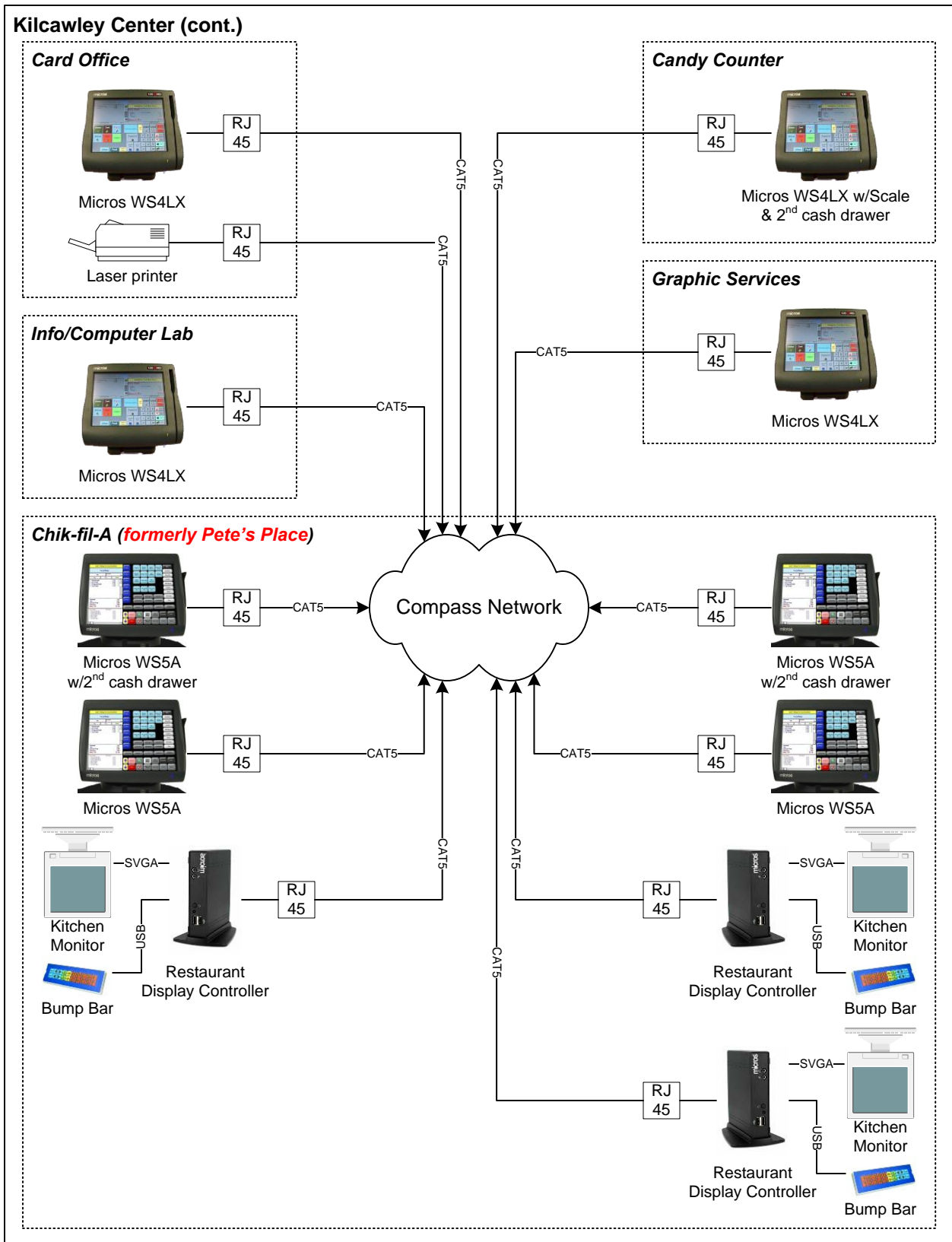


	If your company cannot meet this schedule, explain why and propose an alternative time schedule for providing these reports to Sourcing Alliance.	
	<a href="#">Click here to provide additional commentary, if necessary.</a>	
12.2.4.	<b>Sales Pipeline Reporting.</b> Describe the types of reports and information that are available to track ongoing prospect and sales pipeline activity by your company's sales team in support of joint marketing and sales campaigns implemented by your company and Sourcing Alliance. What types of information and reporting can be accessed by Sourcing Alliance in real time? What types of information and reporting can be provided to Sourcing Alliance electronically on a monthly basis at minimum? Provide samples of prospecting and sales pipeline reports available to Sourcing Alliance.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<a href="#">Click here to provide additional commentary, if necessary.</a>	

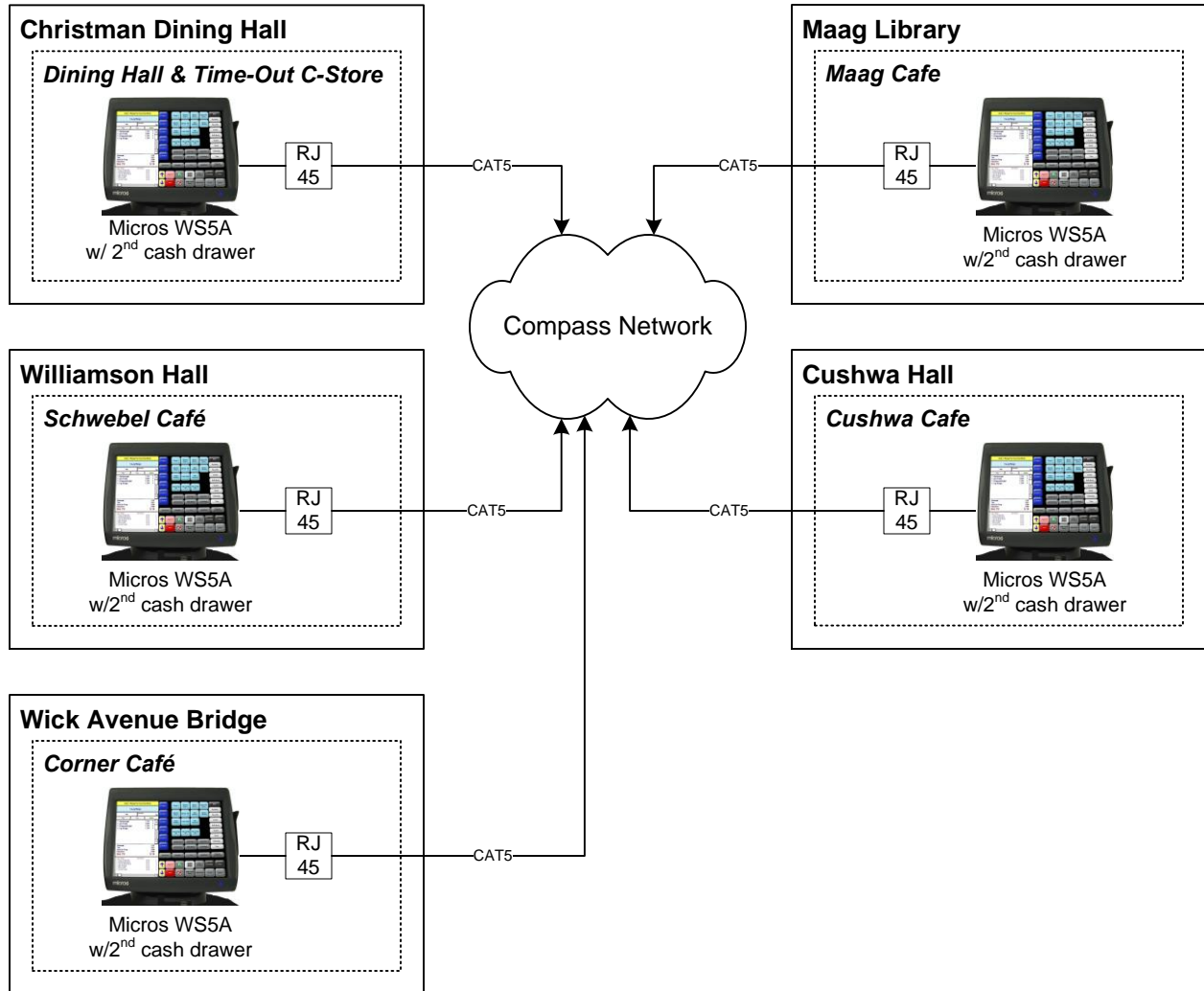
# Youngstown State University Odyssey PCS & Micros 3700 (Page 1 of 4)



# Youngstown State University Odyssey PCS & Micros 3700 (Page 2 of 4)

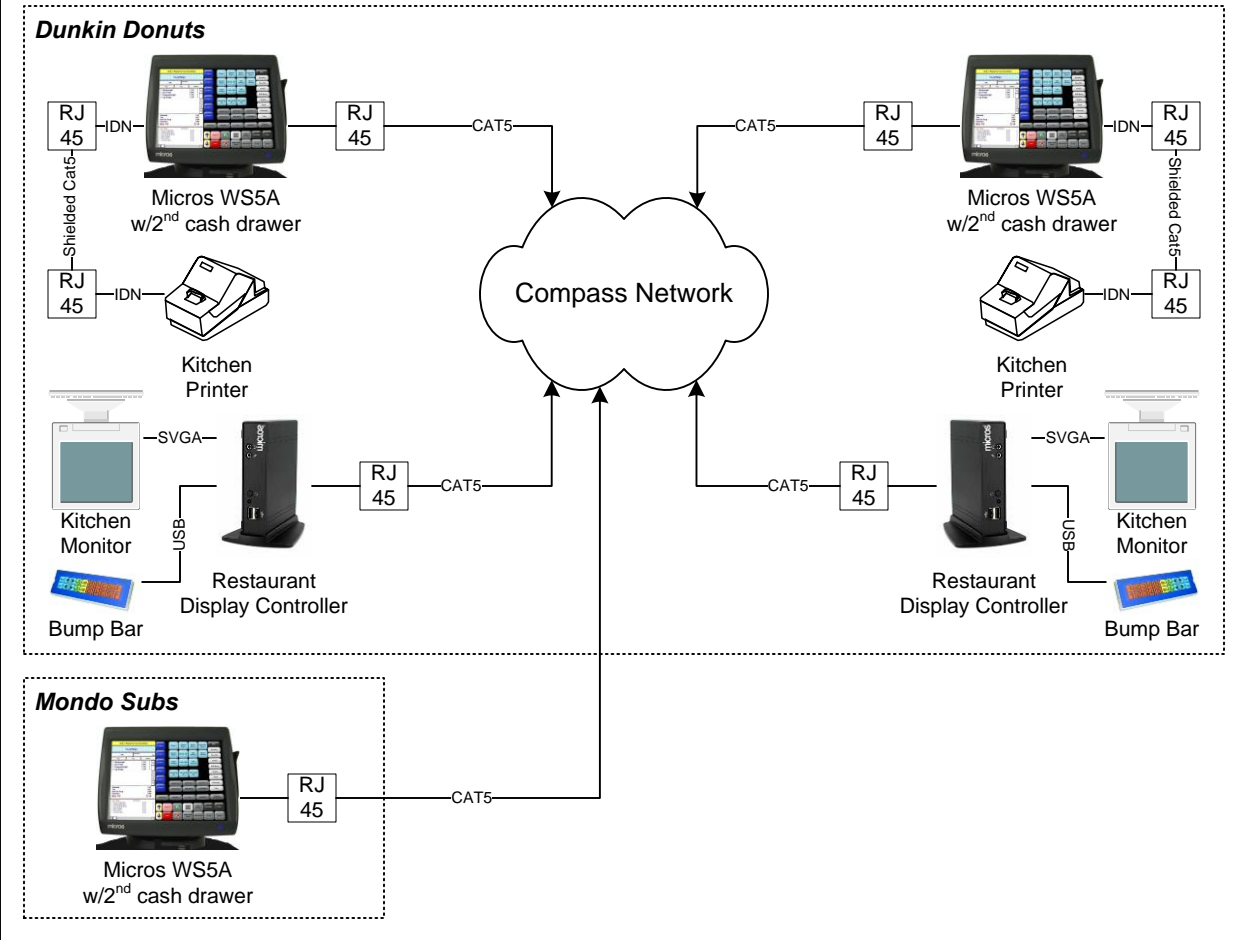


# Youngstown State University Odyssey PCS & Micros 3700 (Page 3 of 4)



# Youngstown State University Odyssey PCS & Micros 3700 (Page 4 of 4)

## The Hub





## ATTACHMENT B

### SOURCING ALLIANCE ONE CARD RFP #2019.1

#### SYSTEM FUNCTIONALITY PRICING

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column C** and leave the remainder of that row blank. Mark any component for which there is no additional charge as "Included" in **Column C**, identify in what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions of particular components as part of your Cost Proposal.

**Column B** identifies the specific components of your offering to price. Components with 1-X at the end are intended for you to present multiple options, if applicable. For example, if your company offers multiple classroom attendance tracking readers, list each reader on a separate line and fill in the remainder of each row accordingly. The Issuers have provided one line as a placeholder; if your company offers 10 classroom attendance readers, insert nine additional rows, one for each reader, for a total of 10 rows of classroom attendance readers.

**Column C** requests information about how each component is priced for Sourcing Alliance Members. For example, how a subscription for hosted software is priced on a per seat or per patron basis or an X% discount from list for hardware.

**Column D** provides space to include any additional notes or relevant information about that particular component that would be helpful for the Issuers in scoring your proposal.

**Columns E-F** provide space to price that component by year for five years. For some items (such as the base System and specific additional modules), you should be able to provide pricing specific to Youngstown State University based on the requirements in the RFP. Other items (such as training or implementation) could be priced on an hourly, project, or flat fee basis depending on the specific component and how your business model is structured. Still other items (such as hardware or maintenance) could be priced on a per unit or per occurrence basis.

The "**Any Other Costs Related to the System**" section is included for you to identify any additional costs or additional components that are not already identified in **Column B**. Respondents must fully disclose any costs that will be or could be charged to Sourcing Alliance Members.

Software Solution	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Base System Subscription (Hosted)							
Base System Licenses (Non-Hosted)							
Event Attendance Tracking Module 1-X							
Classroom Attendance Tracking Module 1-X							
Dining/Meal Plan Module 1-X							
Equipment Checkout Module 1-X							
Laundry Reservation Module 1-X							
Off-Campus Vending Module 1-X							
Online Web-Based Ordering Module 1-X							
Parking Module 1-X							
Transit Module 1-X							
Vending & Copier Controllers Module 1-X							
Visitor Registration Module 1-X							
Additional Module/Capability 1-X							
Implementation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement Option 1-X							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, System Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

Hardware	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Event Attendance Tracking Hardware Item 1-X							
Classroom Attendance Tracking Hardware Item 1-X							
Dining/Meal Plan Hardware Item 1-X							

**ATTACHMENT B**

**SOURCING ALLIANCE ONE CARD RFP #2019.1**

**SYSTEM FUNCTIONALITY PRICING**

Equipment Checkout Hardware Item 1-X							
Laundry Hardware Item 1-X							
Off-Campus Vending Hardware Item 1-X							
Parking Hardware Item 1-X							
Transit Hardware Item 1-X							
Vending & Copier Controller Hardware Item 1-X							
Visitor Registration Hardware Item 1-X							
Other Hardware Item 1-X							
Installation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement Option 1-X							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

Managed Services	How is this service priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Fully-Managed Off-Campus Vending Service							
Other Managed Services 1-X							

Any Other Costs Related to the System	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Additional Cost/Component 1-X							

## ATTACHMENT B

### SOURCING ALLIANCE ONE CARD RFP #2019.1

#### CARDS CARD PRODUCTION PRICING

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column C** and leave the remainder of that row blank. Mark any component for which there is no additional charge as "Included" in **Column C**, identify in what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions of particular components as part of your Cost Proposal.

**Column B** identifies the specific components of your offering to price. Components with 1-X at the end are intended for you to present multiple options, if applicable. For example, if your company offers multiple card types/sizes, list each card type/size on a separate line and fill in the remainder of each row accordingly. The Issuers have provided one line as a placeholder; if your company offers 10 card types/sizes, insert nine additional rows, one for each card type/size, for a total of 10 rows of card types/sizes.

**Column C** requests information about how each component is priced for Sourcing Alliance Members. For example, how a subscription for hosted software is priced on a per seat or per patron basis or an X% discount from list for hardware.

**Column D** provides space to include any additional notes or relevant information about that particular component that would be helpful for the Issuers in scoring your proposal.

**Columns E-F** provide space to price that component by year for five years. For some items (such as the base System and specific additional modules), you should be able to provide pricing specific to Youngstown State University based on the requirements in the RFP. Other items (such as training or implementation) could be priced on an hourly, project, or flat fee basis depending on the specific component and how your business model is structured. Still other items (such as hardware or maintenance) could be priced on a per unit or per occurrence basis.

The "**Any Other Costs Related to Cards & Card Production**" section is included for you to identify any additional costs or additional components that are not already identified in **Column B**. Respondents must fully disclose any costs that will be or could be charged to Sourcing Alliance Members.

Software Solution	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Card System Subscription (Hosted)							
Card System Licenses (Non-Hosted)							
Additional Module/Capability 1-X							
Implementation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement 1-X							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, System Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

Hardware	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Card Type 1-X							
Card Production Type 1-X							
Offsite Card Production Solution 1-X							
Kiosk Type 1-X							
Installation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement 1-X							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

**ATTACHMENT B**

**SOURCING ALLIANCE ONE CARD RFP #2019.1**

**CARDS CARD PRODUCTION PRICING**

Managed Services	How is this service priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Off-Campus Card Production							
Other Managed Services 1-X							

Any Other Costs Related to the Card System	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Additional Cost/Component 1-X							

## ATTACHMENT B

### SOURCING ALLIANCE ONE CARD RFP #2019.1

#### ACCESS CONTROL PRICING

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column C** and leave the remainder of that row blank. Mark any component for which there is no additional charge as "Included" in **Column C**, identify in what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions of particular components as part of your Cost Proposal.

**Column B** identifies the specific components of your offering to price. Components with 1-X at the end are intended for you to present multiple options, if applicable. For example, if your company offers a wide range of access control hardware/card readers, list each card reader on a separate line and fill in the remainder of each row accordingly. The Issuers have provided one line as a placeholder; if your company offers 10 card readers, insert nine additional rows, one for each card reader, for a total of 10 rows of card readers.

**Column C** requests information about how each component is priced for Sourcing Alliance Members. For example, how a subscription for hosted software is priced on a per seat or per patron basis or an X% discount from list for hardware.

**Column D** provides space to include any additional notes or relevant information about that particular component that would be helpful for the Issuers in scoring your proposal.

**Columns E-F** provide space to price that component by year for five years. For some items (such as the base System and specific additional modules), you should be able to provide pricing specific to Youngstown State University based on the requirements in the RFP. Other items (such as training or implementation) could be priced on an hourly, project, or flat fee basis depending on the specific component and how your business model is structured. Still other items (such as hardware or maintenance) could be priced on a per unit or per occurrence basis.

The "**Any Other Costs Related to Access Control**" section is included for you to identify any additional costs or additional components that are not already identified in **Column B**. Respondents must fully disclose any costs that will be or could be charged to Sourcing Alliance Members.

Software Solution	How is this item priced?	Additional notes or relevant information.	Pricing by Year					
			Year 1	Year 2	Year 3	Year 4	Year 5	
Access Control System Subscription (Hosted)								
Access Control System Licenses (Non-Hosted)								
Wireless Module 1-X								
Biometric Module 1-X								
Additional Module 1-X								
Implementation & Integration								
Training								
Maintenance								
Support								
Service Level Agreement 1-X								
Updates/Upgrades								
Test Environment								
Documentation (e.g., User Guides, System Admin Manual, Release Notes, etc.)								
Other (Please Explain)								

Hardware	How is this item priced?	Additional notes or relevant information.	Pricing by Year					
			Year 1	Year 2	Year 3	Year 4	Year 5	
Card Reader 1-X								
Wireless Card Reader 1-X								
Biometric Card Reader 1-X								
Other Hardware Item 1-X								
Installation & Integration								
Training								
Maintenance								
Support								
Service Level Agreement 1-X								
Updates/Upgrades								

**ATTACHMENT B**

**SOURCING ALLIANCE ONE CARD RFP #2019.1**

**ACCESS CONTROL PRICING**

Test Environment							
Documentation (e.g., User Guides, Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

Any Other Costs Related to Access Control	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Additional Cost/Component 1-X							



## ATTACHMENT B

### SOURCING ALLIANCE ONE CARD RFP #2019.1

#### POINT-OF-SALE PRICING

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column C** and leave the remainder of that row blank. Mark any component for which there is no additional charge as "Included" in **Column C**, identify in what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions of particular components as part of your Cost Proposal.

**Column B** identifies the specific components of your offering to price. Components with 1-X at the end are intended for you to present multiple options, if applicable. For example, if your company offers a wide range of point of sale registers, list each register on a separate line and fill in the remainder of each row accordingly. The Issuers have provided one line as a placeholder; if your company offers 10 registers, insert nine additional rows, one for each register, for a total of 10 rows of registers.

**Column C** requests information about how each component is priced for Sourcing Alliance Members. For example, how a subscription for hosted software is priced on a per seat or per patron basis or an X% discount from list for hardware.

**Column D** provides space to include any additional notes or relevant information about that particular component that would be helpful for the Issuers in scoring your proposal.

**Columns E-F** provide space to price that component by year for five years. For some items (such as the base System and specific additional modules), you should be able to provide pricing specific to Youngstown State University based on the requirements in the RFP. Other items (such as training or implementation) could be priced on an hourly, project, or flat fee basis depending on the specific component and how your business model is structured. Still other items (such as hardware or maintenance) could be priced on a per unit or per occurrence basis.

The "**Any Other Costs Related to Point-of-Sale**" section is included for you to identify any additional costs or additional components that are not already identified in **Column B**. Respondents must fully disclose any costs that will be or could be charged to Sourcing Alliance Members.

Software Solution	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
POS System Subscription (Hosted)							
POS System Licenses (Non-Hosted)							
Additional POS Module/Capability 1-X							
Implementation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement 1-X							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, System Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

Hardware	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
POS Terminal 1-X							
Small/Retail POS Terminal 1-X							
Installation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement 1-X							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

ATTACHMENT B

SOURCING ALLIANCE ONE CARD RFP #2019.1

POINT-OF-SALE PRICING

Any Other Costs Related to Point of Sale	How is this item priced?	Additional notes or relevant information.	Year 1	Year 2	Pricing by Year			Year 4	Year 5
					Year 3				
Additional POS Cost/Component 1-X									

# ATTACHMENT B

## SOURCING ALLIANCE ONE CARD RFP #2019.1

### POINT-OF-SALE PRICING

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column C** and leave the remainder of that row blank. Mark any component for which there is no additional charge as "Included" in **Column C**, identify in what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions of particular components as part of your Cost Proposal.

**Column B** identifies the specific components of your offering to price. Components with 1-X at the end are intended for you to present multiple options, if applicable. For example, if your company offers a wide range of point of sale registers, list each register on a separate line and fill in the remainder of each row accordingly. The Issuers have provided one line as a placeholder; if your company offers 10 registers, insert nine additional rows, one for each register, for a total of 10 rows of registers.

**Column C** requests information about how each component is priced for Sourcing Alliance Members. For example, how a subscription for hosted software is priced on a per seat or per patron basis or an X% discount from list for hardware.

**Column D** provides space to include any additional notes or relevant information about that particular component that would be helpful for the Issuers in scoring your proposal.

**Columns E-F** provide space to price that component by year for five years. For some items (such as the base System and specific additional modules), you should be able to provide pricing specific to Youngstown State University based on the requirements in the RFP. Other items (such as training or implementation) could be priced on an hourly, project, or flat fee basis depending on the specific component and how your business model is structured. Still other items (such as hardware or maintenance) could be priced on a per unit or per occurrence basis.

Additional System Features	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Feature 1-X							

Other Offerings	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Other Offering 1-X							

## ATTACHMENT B

### SOURCING ALLIANCE ONE CARD RFP #2019.1

#### SYSTEM FUNCTIONALITY PRICING

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column C** and leave the remainder of that row blank. Mark any component for which there is no additional charge as "Included" in **Column C**, identify in what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions of particular components as part of your Cost Proposal.

**Column B** identifies the specific components of your offering to price. Components with (x10) or (*xSpecific Number*) at the end of the description are intended to provide the specific quantity requested by YSU. For example, if YSU requires ten (10) event attendance tracking readers (see cell B30 in this tab for an example), then you will see (x10) following the description to identify the quantity needed. If you would like to submit quotes for several different reader options you can copy and insert on a separate line and fill in the remainder of each row accordingly. The Issuers have provided one line as a placeholder; if your company offers 10 event attendance tracking readers, insert nine additional rows, one for each reader, for a total of 10 rows of event attendance tracking readers. Please be specific with your notes so the Issuers clearly understand what is being priced.

**Column C** requests information about how each component is priced for Sourcing Alliance Members. For example, how a subscription for hosted software is priced on a per seat or per patron basis or an X% discount from list for hardware.

**Column D** provides space to include any additional notes or relevant information about that particular component that would be helpful for the Issuers in scoring your proposal.

**Columns E-F** provide space to price that component by year for five years. For some items (such as the base System and specific additional modules), you should be able to provide pricing specific to Youngstown State University based on the requirements in the RFP. Other items (such as training or implementation) could be priced on an hourly, project, or flat fee basis depending on the specific component and how your business model is structured. Still other items (such as hardware or maintenance) could be priced on a per unit or per occurrence basis.

The "**Any Other Costs Related to the System**" section is included for you to identify any additional costs or additional components that are not already identified in **Column B**. Respondents must fully disclose any costs that will be or could be charged to Sourcing Alliance Members.

Software Solution	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Base System Subscription (Hosted)		Please include the E commerce platform for adding points and purchasing meal plans					
Event Attendance Tracking Module							
Dining/M meal Plan Module							
Equipment Checkout Module							
Off-Campus Vending Module (13 or more vendors)		We anticipate 13 or more vendors on the off campus vendors					
Online Web-Based Ordering Module							
Parking Module		Must work with T2 Systems!					
Implementation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement Option		What does this cover? Levels of service agreement. We need 365 24/7 support.					
Updates/Upgrades		With hosted solutions is this included in the price?					
Test Environment		Does the test environment exist and how many instances do you get?					
Documentation (e.g., User Guides, System Admin Manual, Release Notes, etc.)		Web based documentaion will work for us.					
Online Photo Submission		My Photo or integrated option.					

Hardware	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Event Attendance Tracking Hardware Item - (x10)		YSU will initially install event attendance tracking capabilities at six locations and requires four portable devices that can be deployed as needed across campus.					
Dining/M meal Plan Hardware Item							

**ATTACHMENT B**

**SOURCING ALLIANCE ONE CARD RFP #2019.1**

**SYSTEM FUNCTIONALITY PRICING**

Off-Campus Vending Hardware Item		Managed by the off campus dining provider.					
Parking Hardware Item							
Other Hardware Item							
Installation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement Option							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

Managed Services	How is this service priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Fully-Managed Off-Campus Vending Service							
Other Managed Services							

Any Other Costs Related to the System	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Additional Cost/Component							

## ATTACHMENT B

### SOURCING ALLIANCE ONE CARD RFP #2019.1

#### POINT-OF-SALE PRICING

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column C** and leave the remainder of that row blank. Mark any component for which there is no additional charge as "Included" in **Column C**, identify in what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions of particular components as part of your Cost Proposal.

**Column B** identifies the specific components of your offering to price. Components with (x10) or (*xSpecific Number*) at the end of the description are intended to provide the specific quantity requested by YSU. For example, if YSU requires twenty-one (21) POS Terminals (see cell B25 in this tab for an example), then you will see (x21) following the description to identify the quantity needed. If you would like to submit quotes for several different POS Terminal options you can copy and insert on a separate line and fill in the remainder of each row accordingly. The Issuers have provided one line as a placeholder; if your company would like to offer 10 different POS Terminals, insert nine additional rows, one for each reader, for a total of 10 rows of POS Terminals. Please be specific with your notes so the Issuers clearly understand what is being priced.

**Column C** requests information about how each component is priced for Sourcing Alliance Members. For example, how a subscription for hosted software is priced on a per seat or per patron basis or an X% discount from list for hardware.

**Column D** provides space to include any additional notes or relevant information about that particular component that would be helpful for the Issuers in scoring your proposal.

**Columns E-F** provide space to price that component by year for five years. For some items (such as the base System and specific additional modules), you should be able to provide pricing specific to Youngstown State University based on the requirements in the RFP. Other items (such as training or implementation) could be priced on an hourly, project, or flat fee basis depending on the specific component and how your business model is structured. Still other items (such as hardware or maintenance) could be priced on a per unit or per occurrence basis.

The "**Any Other Costs Related to the System**" section is included for you to identify any additional costs or additional components that are not already identified in **Column B**. Respondents must fully disclose any costs that will be or could be charged to Sourcing Alliance Members.

Software Solution	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
POS System Subscription (Hosted)		YSU would like a hosted solution.					
Additional POS Module/Capability							
Implementation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, System Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

Hardware	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
POS Terminal (x21)							
Kitchen Display System (x5)							
Cash Drawers (x32)							
Bump Bars (x5)							
Pole Displays (x21)							
Barcode Scanner (x21)		If this is how mobile ID works we will get one of these for each POS terminal					
Thermal Receipt Printers (x21)							
Kitchen Printers (x3)							
Scale							
Small/Retail POS Terminal							



**ATTACHMENT B**

**SOURCING ALLIANCE ONE CARD RFP #2019.1**

**POINT-OF-SALE PRICING**

Installation & Integration		YSU would like to install their own hardware for POS areas					
Training							
Maintenance							
Support							
Service Level Agreement							
Updates/Upgrades							
Test Environment		Test transactions					
Documentation (e.g., User Guides, Admin Manual, Release Notes, etc.)							
Other (Please Explain)		If we can use peripherals from previous system that would be ideal.					

## ATTACHMENT B

### SOURCING ALLIANCE ONE CARD RFP #2019.1

#### CARDS CARD PRODUCTION PRICING

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column C** and leave the remainder of that row blank. Mark any component for which there is no additional charge as "Included" in **Column C**, identify in what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions of particular components as part of your Cost Proposal.

**Column B** identifies the specific components of your offering to price. Components with (x10) or (*xSpecific Number*) at the end of the description are intended to provide the specific quantity requested by YSU. For example, if YSU requires two (2) Card Printers (see cell B27 in this tab for an example), then you will see (x2) following the description to identify the quantity needed. If you would like to submit quotes for several different Card Printer options you can copy and insert on a separate line and fill in the remainder of each row accordingly. The Issuers have provided one line as a placeholder; if your company would like to offer 10 different Card Printers, insert nine additional rows, one for each reader, for a total of 10 rows of Card Printers. Please be specific with your notes so the Issuers clearly understand what is being priced.

**Column C** requests information about how each component is priced for Sourcing Alliance Members. For example, how a subscription for hosted software is priced on a per seat or per patron basis or an X% discount from list for hardware.

**Column D** provides space to include any additional notes or relevant information about that particular component that would be helpful for the Issuers in scoring your proposal.

**Columns E-F** provide space to price that component by year for five years. For some items (such as the base System and specific additional modules), you should be able to provide pricing specific to Youngstown State University based on the requirements in the RFP. Other items (such as training or implementation) could be priced on an hourly, project, or flat fee basis depending on the specific component and how your business model is structured. Still other items (such as hardware or maintenance) could be priced on a per unit or per occurrence basis.

The "**Any Other Costs Related to the System**" section is included for you to identify any additional costs or additional components that are not already identified in **Column B**. Respondents must fully disclose any costs that will be or could be charged to Sourcing Alliance Members.

Software Solution	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Card System Subscription (Hosted)		YSU would like a hosted solution					
Additional Module/Capability							
Implementation & Integration							
Training							
Maintenance							
Support							
Service Level Agreement							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, System Admin Manual, Release Notes, etc.)							
Other (Please Explain)							

Hardware	How is this item priced?	Additional notes or relevant information.	Pricing by Year				
			Year 1	Year 2	Year 3	Year 4	Year 5
Card Type							
Card Production Type							
Card Printers (x2)		We will need 2 card printers for card production.					
Installation & Integration							
Training							
Maintenance		Rapid replacement plan. Will we get a refferbished or new hardware?					
Support							
Service Level Agreement							
Updates/Upgrades							
Test Environment							
Documentation (e.g., User Guides, Admin Manual, Release Notes, etc.)							

**Instructions to complete this tab of the Cost Proposal:**

Mark any individual component that is not applicable as "Not Applicable" in **Column A** and indicate what other component this component is included, and leave the remainder of that row blank.

You may reference and attach spec sheets, pricing schedules, and more detailed descriptions in **Column B** identifies the specific components of your offering to price. If you would like to include more than one line item, the Issuers have provided one line as a placeholder; if your company would like to offer more than one component, the Issuers clearly understand what is being priced.

**Column C** requests information about how each component is priced for Sourcing All hardware.

**Column D** provides space to include any additional notes or relevant information about the component. **Columns E-F** provide space to price that component by year for five years. For some components, pricing is based on the requirements in the RFP. Other items (such as training or implementation) could be priced on a per unit or per hour basis. Still other items (such as hardware or maintenance) could be priced on a per unit or per year basis. The "Any Other Costs Related to the System" section is included for you to identify any other costs that may be or could be charged to Sourcing Alliance Members.

**Software Solution**

Access Control System Subscription (Hosted)
Additional Module
Implementation & Integration
Training
Maintenance
Support
Service Level Agreement
Updates/Upgrades
Test Environment
Documentation (e.g., User Guides, System Admin Manual, Release Notes, etc.)
Other (Please Explain)

**Hardware**

Card Reader
Other Hardware Item
Installation & Integration
Training
Maintenance
Support
Service Level Agreement
Updates/Upgrades
Test Environment
Documentation (e.g., User Guides, Admin Manual, Release Notes, etc.)
Other (Please Explain)

**Any Other Costs Related to Access Control**

Additional Cost/Component
---------------------------



How is this item priced?

Additional notes or relevant information.

Year 1

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as "Included" in Column C, identify in

remainder of each row accordingly.  
. Please be specific with your notes so

on basis or an X% discount from list for

specific to Youngstown State University  
/ your business model is structured.

ust fully disclose any costs that will be

Year 2	Year 3	Year 4	Year 5

**Pricing by Year**

Year 2	Year 3	Year 4	Year 5

**Pricing by Year**



Year 2   Year 3   Year 4   Year 5

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## ATTACHMENT C

### SOURCING ALLIANCE ONE CARD RFP #2019.1

#### REQUIRED RESPONDENT INFORMATION & CERTIFICATIONS

**Purpose of this Attachment C:** Sourcing Alliance requires the following information about respondents (“Respondents”) who submit proposals in response to any Sourcing Alliance Request for Proposal (“RFP”) in order to facilitate the development of the contract with the winning supplier (“Winning Supplier”). Sourcing Alliance reserves the right to reject a Respondent’s proposal if the Respondent fails to provide this information fully, accurately, and by the deadline set by Sourcing Alliance in the RFP. Further, some of this information (as identified below) **must** be provided in order for Sourcing Alliance to accept and consider a Respondent’s proposal. **Failure to provide such required information will result in a Respondent’s proposal being deemed nonresponsive to this RFP.**

**Instructions:** Provide the following information regarding the Respondent submitting the proposal. Respondents may a) complete this document in Microsoft Word by completing the form fields, print this attachment, and sign it in the designated signature areas, b) print this attachment, complete it, and sign it in the designated signature areas, or c) provide the required information and certifications (each fully re-stated from this attachment) on a separate document. It is mandatory that the information provided is certified with an original signature (in **blue ink**, please) from a person with sufficient authority and/or authorization to represent the Respondent. Respondents are to provide the completed and signed information and certifications in **Tab 1** of the Technical Proposal submitted to Sourcing Alliance as described in **RFP Section 4.2 - Format for Organization of the Proposal**.

***[REMAINDER OF PAGE INTENTIONALLY LEFT BLANK]***



**Respondents must provide all the information outlined below**

1. Sourcing Alliance RFP Name: <u>RFP #2019.1 One Card</u>	2. Proposal Due Date: <u>June 14, 2019 at 2 PM Eastern</u>
3. Respondent Name:  _____	4. Respondent Federal Tax ID # or Social Security #:  _____
(legal name of the entity responding to RFP)	
5. Respondent Corporate Address:  _____ _____ _____	6. Respondent Remittance Address (or "same" if same as Item #5):  _____ _____ _____

7. Print or type information about the Respondent representative/contact person authorized to answer questions regarding the proposal submitted by your company:

Respondent Representative: \_\_\_\_\_

Representative's Title: \_\_\_\_\_

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_

Fax #: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

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8. Print or type the name of the Representative representative authorized to address contractual issues, including the authority to execute a contract on behalf of the Respondent, and to whom legal notices regarding contract termination or breach, should be sent (if not the same individual as in #7, provide the following information on each such representative and specify their function):

Respondent Representative: \_\_\_\_\_

Representative's Title: \_\_\_\_\_

Address 1: \_\_\_\_\_

Address 2: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_



Phone #: \_\_\_\_\_  
Fax #: \_\_\_\_\_  
E-Mail Address: \_\_\_\_\_

9. Is this Respondent an Ohio certified Minority Business Enterprise ("MBE")? Yes  No

If yes, attach a copy of current certification to proposal as an appendix in Tab 4 of your proposal.

10. Mandatory Supplier Certifications:

Sourcing Alliance may not enter into contracts with any suppliers who have been found to be ineligible for state contracts under specific federal or Ohio statutes or regulations. Respondents responding to any Sourcing Alliance RFP MUST certify that they are NOT ineligible by signing each of the four statements below. Failure to provide proper affirming signature on any of these statements will result in a Respondent's proposal being deemed nonresponsive to this RFP.

I, \_\_\_\_\_ (insert signature of representative shown in Item #7, above), hereby certify and affirm that \_\_\_\_\_ (insert name of the submitting Respondent shown in Item #3, above), has not been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in transactions by the United States Department of Labor, the United States Department of Health and Human Services, or any other federal department or agency as set forth in 29 CFR Part 98, or 45 CFR Part 76, or other applicable statutes.

AND

I, \_\_\_\_\_ (insert signature of representative shown in Item #7, above), hereby certify and affirm that \_\_\_\_\_ (insert name of the submitting Respondent shown in Item #3, above), is in compliance with all federal, state, and local laws, rules, and regulations, including but not limited to the Occupational Safety and Health Act and the Ohio Bureau of Employment Services and the following:

- Not penalized or debarred from any public contracts or falsified certified payroll records or any other violation of the Fair Labor Standards Act in the last three (3) years;
- Not found to have violated any worker's compensation law within the last three (3) years;
- Not violated any employee discrimination law within the last three (3) years;
- Not have been found to have committed more than one (1) willful or repeated OSHA violation of a safety standard (as opposed to a record keeping or administrative standard) in the last three (3) years;
- Not have an Experience Modification Rating of greater than 1.5 (a penalty-rated employer) with respect to the Bureau of Workers' Compensation risk assessment rating; and
- Not have failed to file any required tax returns or failed to pay any required taxes to any governmental entity within the past three (3) years.

AND

I \_\_\_\_\_ (insert signature of representative shown in Item #7, above) hereby certify and affirm that \_\_\_\_\_ (insert name of the submitting supplier shown in Item #3, above), is not on the list established by the Ohio Secretary of State, pursuant to ORC Section 121.23, which identifies persons and businesses with more than one unfair labor practice contempt of court finding against them.

AND

I \_\_\_\_\_ (insert signature of representative shown in Item #7, above) hereby certify and affirm that \_\_\_\_\_ (insert name of the submitting Respondent shown in Item #3, above), either is not subject to a finding for recovery under ORC Section 9.24, or has taken appropriate remedial steps required under



that statute to resolve any findings for recovery, or otherwise qualifies under that section to enter into contracts with Sourcing Alliance.

11. Supplemental Respondent Contract and Equal Employment Opportunity Information:

A. Provide data on Respondent employees both nationwide (inclusive of Ohio staff) and the number of Ohio employees:

	<u>Nationwide:</u>	<u>Ohio Offices:</u>
Total Number of Employees:	_____	_____
% of those who are Women:	_____	_____
% of those who are Minorities:	_____	_____

B. If you are the Winning Supplier and this RFP involves the provision of services to Sourcing Alliance Members, will you subcontract any part of the work?

- NO -or-
- YES, but for less than 50% of the work -or-
- YES, for 50% or more of the work

C. If any part of your proposal would be performed by any subcontractors, provide the following information on each subcontractor (additional pages may be added as needed):

Subcontractor Name: \_\_\_\_\_

Street Address 1: \_\_\_\_\_

Street Address 2: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Work to be Performed: \_\_\_\_\_

Estimated percentage of total proposal to be performed by subcontractors: \_\_\_\_\_ % (Do NOT show dollar amounts here; show % of WORK sub-contractors will perform/provide). Define the part of the work that will be performed by each subcontractor.

Subcontractor's employee information (attach additional pages if needed):

	<u>Nationwide:</u>	<u>Ohio Offices:</u>
Total Number of Employees:	_____	_____
% of those who are Women:	_____	_____
% of those who are Minorities:	_____	_____

12. Respondent has read the Sourcing Alliance Model Contract attached to the RFP as Attachment F, and if awarded a contract,  Respondent will not (or)  supplier will request changes to the standard language and has marked the requested changes and returned the model document with this proposal for consideration by Sourcing Alliance. (If any changes are requested, Respondent will review those requested changes if you are the Winning Supplier. All requested changes to model contract language are subject to Respondent approval.)



13. I \_\_\_\_\_, (insert name of Respondent representative in Item #7, above) hereby affirm that this proposal accurately represents the capabilities and qualifications of \_\_\_\_\_ (insert name of submitting Respondent as shown in item #3, above), and I hereby affirm that the cost(s) proposed to Sourcing Alliance for the performance of services and/or provision of goods covered in this proposal in response to this Sourcing Alliance RFP is a firm fixed price structure as described in the Cost Proposal, inclusive of all incidental as well as primary costs. (Failure to provide the proper affirming signature on this item may result in the disqualification of your proposal.)

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

# ATTACHMENT D

SOURCING ALLIANCE ONE CARD RFP #2019.1

## HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

### Shared Assessments Introduction

Campus IT environments are rapidly changing and the speed of cloud service adoption is increasing. Institutions looking for ways to do more with less see cloud services as a good way to save resources. As campuses deploy or identify cloud services, they must ensure the cloud services are appropriately assessed for managing the risks to the confidentiality, integrity and availability of sensitive institutional information and the PII of constituents. Many campuses have established a cloud security assessment methodology and resources to review cloud services for privacy and security controls. Other campuses don't have sufficient resources to assess their cloud services in this manner. On the vendor side, many cloud services providers spend significant time responding to the individualized security assessment requests made by campus customers, often answering similar questions repeatedly. Both the provider and consumer of cloud services are wasting precious time creating, responding, and reviewing such assessments.

The **Higher Education Cloud Vendor Assessment Tool - Lite (HECVAT - Lite)** attempts to generalize higher education information security and data protection questions and issues for consistency and ease of use. Some institutions may have specific issues that must be addressed in addition to the general questions provided in this assessment. It is anticipated that this HECVAT will be revised over time to account for changes in cloud services provisioning and the information security and data protection needs of higher education institutions.

The Higher Education Cloud Vendor Assessment Tool:

**Proceed to the next tab, Instructions.**

# ATTACHMENT D

SOURCING ALLIANCE ONE CARD RFP #2019.1

## HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

### Higher Education Cloud Vendor Assessment Tool - Instructions

#### Target Audience

These instructions are for **vendors** interested in providing the Institution with a software and/or a service. This worksheet should not be completed by an Institution entity. The purpose of this worksheet is for the vendor to submit robust security safeguard information in regards to the product (software/service) being assessed in the Institution's assessment process.

#### Document Layout

There are five main sections of the Higher Education Cloud Vendor Assessment Tool, all listed below and outlined in more detail. This document is designed to have the first two sections populated first; after the Qualifiers section is completed it can be populated in any order. Within each section, answer each question top-to-bottom. Some questions are nested and may be blocked out via formatting based on previous answers. Populating this document in the correct order improves efficiency.

**Do not overwrite selection values (data validation) in column C of the HECVAT-Lite tab.**

<b>General Information</b>	This section is self-explanatory; product specifics and contact information. <b>GNRL-01 through GNRL-10 should be populated by the Vendor.</b> GNRL-11 and GNRL-12 are for Institution use only.
<b>Qualifiers</b>	Populate this section <b>completely</b> before continuing. Answers in this section can determine which sections will be required for this assessment. By answering "No" to Qualifiers, their matched sections become optional and are highlighted in orange.
<b>Documentation</b>	Focused on external documentation, the Institution is interested in the frameworks that guide your security strategy and what has been done to certify these implementations.
<b>Company Overview</b>	This section is focused on company background, size, and business area experience.
<b>Safeguards</b>	The remainder of the document consists of various safeguards, grouped generally by section.

In sections where vendor input is required there are only one or two columns that need modification, Vendor Answers and Additional Information, columns C and D respectively (see Figure 1 below). You will see that sometimes C and D are separate and other times are merged. If they are separate, C will be a selectable, drop-down box and any supporting information should be added to column D. If C and D are merged, the question is looking for the answer to be in narrative form. At the far right is a column titled "Guidance". After answering questions, check this column to ensure you have submitted information/documentation to sufficiently answer the question. Use the "Additional Information" column to provide any requested details.

Figure 1:

C	D	E
<b>Vendor Answers</b>	<b>Additional Information</b>	<b>Guidance</b>
No		Provide a brief description.

#### Optional Safeguards Based on Qualifiers

Not all questions are relevant to all vendors. Qualifiers are used to make whole sections optional to vendors depending on the scope of product usage and the data involved in the engagement being assessed. Sections that become optional have the section titles and questions highlighted in orange (see Figure 2).



# ATTACHMENT D

## SOURCING ALLIANCE ONE CARD RFP #2019.1

### HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

Figure 2:

Optional based on QUALIFIER response.	Vendor Answers	Additional Information
Describe or provide a reference to your Business Continuity Plan.		

#### Definitions and Data Zones

<b>Institution</b>	Any school, college, or university using the Higher Education Cloud Vendor Assessment Tool
<b>Institution Data Zone</b>	The country/region in which an Institution is located, including all laws and regulations in-scope within that country/region.
<b>Vendor Data Zone</b>	The country/region in which a vendor is headquartered and/or serves its products/services, including all laws and regulations in-scope within that country/region.
<p>Customers from different regions may expect vary protections of data (e.g. GDPR), this is the Institution Data Zone. Vendors may handle data differently depending on the country or region where data is stored, this is the Vendor Data Zone. As a vendor, if your security practices vary based on your region of operation, <u>you may want to populate a HECVAT in the context for each security zone</u> (strategy). That said, Institutions from different data zones may still use vendor responses from other state Data Zones. If your security practices are the same across all regions of operations, indicate "All" in your Vendor Data Zone.</p>	
	<p><b>Example A:</b> If vendor ABC is headquartered and stores data in Canada, and provides services to only customers in Canada, ABC should state "Canada" in both Data Zone fields.</p> <p><b>Example B:</b> If vendor ABC is headquartered and stores data in Canada, and additionally provides services to customers in the United Kingdom, ABC may want to assure customers in the United Kingdom that their data is handled properly for their region. In that case, ABC should state "Canada" in the Vendor Data Zone and "United Kingdom" in the Institution Data Zone.</p> <p><b>Example C:</b> If your security strategy is broad and doesn't fit this statement model, provide a brief summary in each field and the Institution's Security Analyst can assess your response.</p>

#### Data Reporting

To update data in the Report tabs, click Refresh All in the Menu tab. Input provided in the HECVAT tab is assessed a preliminary score pending Institution's Security Analyst review.

**Proceed to the next tab, HECVAT-Lite.**

#### For Institution's Security Analysts

Raw vendor answers can be viewed in the Cloud Vendor Assessment Tool tab. To begin your assessment, review the Analyst Report tab, ensuring that you select the appropriate security standard used in your institution (cell B7) before you begin. Select compliance states for the outstanding non-compliant or short-answer questions in column G. Once all subjective questions are evaluated and compliance indicated, move to the Summary Report tab. To update the report's data, select Refresh All in the Data menu. Review details in the Summary Report and based on your assessment, follow-up with vendor for clarification(s) or add the Summary Report output to your Institution's reporting documents.

**Higher Education Cloud Vendor Assessment Tool - Lite** Version 2.0

**HEISC Shared Assessments Working Group**

DATE-01	Date	
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**General Information**

In order to protect the institution and its systems, vendors whose products and/or services will access and/or host institutional data must complete the Higher Education Cloud Vendor Assessment Tool. Throughout this tool, anywhere where the term data is used, this is an all-encompassing term including at least data and metadata. Answers will be reviewed by Institution security analysts upon submittal. This process will assist the institution in preventing breaches of protected information and comply with Institution policy, state, and federal law. This is intended for use by vendors participating in a Third Party Security Assessment and should be completed by a vendor.

GNRL-01 through GNRL-15: populated by Vendor

GNRL-01	Vendor Name	
GNRL-02	Product Name	
GNRL-03	Product Description	
GNRL-04	Web Link to Product Privacy Notice	
GNRL-05	Vendor Contact Name	
GNRL-06	Vendor Contact Title	
GNRL-07	Vendor Contact Email	
GNRL-08	Vendor Contact Phone Number	
GNRL-09	Vendor Data Zone	
GNRL-10	Institution Data Zone	

GNRL-11 and GNRL-12: populated by Institution's Security Office

GNRL-11	Campus Security Analyst/Engineer	
GNRL-12	Assessment Contact	

**Instructions**

**Step 1:** Complete each section answering each set of questions in order from top to bottom; the built-in formatting logic relies on this order. **Step 2:** Submit the completed Higher Education Cloud Vendor Assessment Tool - Lite to the Institution according to institutional procedures.

Documentation	Vendor Answers	Additional Information	Guidance
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Documentation	Vendor Answers	Additional Information	Guidance
DOCU-01	Have you undergone a SSAE 16 audit?		
DOCU-02	Have you completed the Cloud Security Alliance (CSA) self assessment or CAIQ?		
DOCU-03	Have you received the Cloud Security Alliance STAR certification?		
DOCU-04	Do you conform with a specific industry standard security framework? (e.g. NIST Cybersecurity Framework, ISO 27001, etc.)		
DOCU-05	Are you compliant with FISMA standards?		
DOCU-06	Does your organization have a data privacy policy?		

Company Overview	Vendor Answers	Additional Information	Guidance
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Company Overview	Vendor Answers	Additional Information	Guidance
COMP-01	Describe your organization's business background and ownership structure, including all parent and subsidiary relationships.		Include circumstances that may involve off-shoring or multi-national agreements.
COMP-02	Describe how long your organization has conducted business in this product area.		Include the number of years and in what capacity.
COMP-03	Do you have existing higher education customers?		
COMP-04	Have you had a significant breach in the last 5 years?		
COMP-05	Do you have a dedicated Information Security staff or office?		
COMP-06	Do you have a dedicated Software and System Development team(s)? (e.g. Customer Support, Implementation, Product Management, etc.)		
COMP-07	Use this area to share information about your environment that will assist those who are assessing your company data security program.		Share any details that would help information security analysts assess your product.

Application/Service Security	Vendor Answers	Additional Information	Guidance
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Application/Service Security	Vendor Answers	Additional Information	Guidance
HLAP-01	Do you support role-based access control (RBAC) for end-users?		
HLAP-02	Do you support role-based access control (RBAC) for system administrators?		
HLAP-03	Can employees access customer data remotely?		
HLAP-04	Can you provide overall system and/or application architecture diagrams including a full description of the data communications architecture for all components of the system?		
HLAP-05	Does the system provide data input validation and error messages?		
HLAP-06	Do you employ a single-tenant environment?		

ATTACHMENT D  
 SOURCING ALLIANCE ONE CARD RFP #2019.1  
 HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

Authentication, Authorization, and Accounting		Vendor Answers	Additional Information	Guidance
HLAA-01	Can you enforce password/passphrase aging requirements?			
HLAA-02	Does your web-based interface support authentication, including standards-based single-sign-on? (e.g. InCommon)			
HLAA-03	Does your support integration with other authentication and authorization systems? List which ones (such as Active Directory, Kerberos and what version) in Additional Info?			
HLAA-04	Does the (servers/infrastructure) support external authentication services (e.g. Active Directory, LDAP) in place of local authentication?			
HLAA-05	Are audit logs available that include AT LEAST all of the following: login, logout, actions performed, and source IP address?			
Business Continuity Plan		Vendor Answers	Additional Information	Guidance
HLBC-01	Do you have a documented Business Continuity Plan (BCP)?			
HLBC-02	Is there a documented communication plan in your BCP for impacted clients?			
HLBC-03	Are all components of the BCP reviewed at least annually and updated as needed to reflect change?			
HLBC-04	Does your organization conduct an annual test of relocating to an alternate site for business recovery purposes?			
Change Management		Vendor Answers	Additional Information	Guidance
HLCH-01	Do you have a documented and currently followed change management process (CMP)?			
HLCH-02	Will the Institution be notified of major changes to your environment that could impact the Institution's security posture?			
HLCH-03	Do you have policy and procedure, currently implemented, guiding how security risks are mitigated until patches can be applied?			
HLCH-04	Do procedures exist to provide that emergency changes are documented and authorized (including after the fact approval)?			
Data		Vendor Answers	Additional Information	Guidance
HLDA-01	Do you physically and logically separate Institution's data from that of other customers?			
HLDA-02	Is sensitive data encrypted in transport? (e.g. system-to-client)			
HLDA-03	Is sensitive data encrypted in storage (e.g. disk encryption, at-rest)?			
HLDA-04	Do backups containing institution data ever leave the Institution's Data Zone, either physically or via network routing?			
HLDA-05	Do you have a media handling process, that is documented and currently implemented, including end-of-life, repurposing, and data sanitization procedures?			
HLDA-06	Is any institution data visible in system administration modules/tools?			
Database		Vendor Answers	Additional Information	Guidance
HLDB-01	Does the database support encryption of specified data elements in storage?			
HLDB-02	Do you currently use encryption in your database(s)?			
Datacenter		Vendor Answers	Additional Information	Guidance
HLDC-01	Will any institution data leave the Institution's Data Zone?			
HLDC-02	Does your company own the physical data center where the Institution's data will reside?			
HLDC-03	Does the hosting provider have a SOC 2 Type 2 report available?			
HLDC-04	Does the physical barrier fully enclose the physical space preventing unauthorized physical contact with any of your devices?			
Disaster Recovery Plan		Vendor Answers	Additional Information	Guidance
HLDR-01	Do you have a Disaster Recovery Plan (DRP)?			
HLDR-02	Are any disaster recovery locations outside the Institution's Data Zone?			
HLDR-03	Are all components of the DRP reviewed at least annually and updated as needed to reflect change?			
Firewalls, IDS, IPS, and Networking		Vendor Answers	Additional Information	Guidance
HLFI-01	Are you utilizing a web application firewall (WAF) and/or a stateful packet inspection (SPI) firewall?			
HLFI-02	Do you have a documented policy for firewall change requests?			
HLFI-03	Are you employing any next-generation persistent threat (NGPT) monitoring?			
HLFI-04	Do you monitor for intrusions on a 24x7x365 basis?			

ATTACHMENT D  
 SOURCING ALLIANCE ONE CARD RFP #2019.1  
 HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

Physical Security		Vendor Answers	Additional Information	Guidance
HLPH-01	Does your organization have physical security controls and policies in place?			
HLPH-02	Are employees allowed to take home customer data in any form?			
Policies, Procedures, and Processes		Vendor Answers	Additional Information	Guidance
HLPP-01	Can you share the organization chart, mission statement, and policies for your information security unit?			
HLPP-02	Are information security principles designed into the product lifecycle?			
HLPP-03	Do you have a formal incident response plan?			
HLPP-04	Do you have a documented information security policy?			
Systems Management & Configuration		Vendor Answers	Additional Information	Guidance
HLSY-01	Are systems that support this service managed via a separate management network?			
HLSY-02	Do you have a systems management and configuration strategy that encompasses servers, appliances, and mobile devices (company and employee owned)?			
Vulnerability Scanning		Vendor Answers	Additional Information	Guidance
HLVU-01	Have your systems and applications had a third party security assessment completed in the last year?			
HLVU-02	Are your systems and applications scanned for vulnerabilities [that are remediated] prior to new releases?			



Higher Education Cloud Vendor Assessment Tool - Lite - Standards Crosswalk							
HEISC Shared Assessments Working Group							
Documentation		CIS Critical Security Controls v6.1	HIPAA	ISO 27002:2013	NIST Cybersecurity Framework	NIST SP 800-171r1	NIST SP 800-53r4
DOCU-01	Have you undergone a SSAE 16 audit?			15.2.1			SA-9
DOCU-02	Have you completed the Cloud Security Alliance (CSA) self assessment or CAIQ?			15.2.1			PE-2, PE-3, PE-5, PE-11, PE-13, PE-14, SA-9
DOCU-03	Have you received the Cloud Security Alliance STAR certification?			15.2.1			PE-2, PE-3, PE-5, PE-11, PE-13, PE-14, SA-9
DOCU-04	Do you conform with a specific industry standard security framework? (e.g. NIST Cybersecurity Framework, ISO 27001, etc.)			18.1.1			SA-9
DOCU-05	Are you compliant with FISMA standards?			18.1.1			SA-9
DOCU-06	Does your organization have a data privacy policy?		\$164.308(a)(1)(i)	18.1.4	ID.GV-3	ID.GV-3	SA-9
Company Overview		CIS Critical Security Controls v6.1	HIPAA	ISO 27002:2013	NIST Cybersecurity Framework	NIST SP 800-171r1	NIST SP 800-53r4
COMP-01	Describe your organization's business background and ownership structure, including all parent and subsidiary relationships.						
COMP-02	Describe how long your organization has conducted business in this product area.						
COMP-03	Do you have existing higher education customers?			15.2.1			
COMP-04	Have you had a significant breach in the last 5 years?			15.2.2			
COMP-05	Do you have a dedicated Information Security staff or office?			15.2.1			
COMP-06	Do you have a dedicated Software and System Development team(s)? (e.g. Customer Support, Implementation, Product Management, etc.)			14.2.1			SA-3, SA-15, SC-2, PM-2, PM-10, SI-5,PM-3
COMP-07	Use this area to share information about your environment that will assist those who are assessing your company data security program.			15.2.1			
Application/Service Security		CIS Critical Security Controls v6.1	HIPAA	ISO 27002:2013	NIST Cybersecurity Framework	NIST SP 800-171r1	NIST SP 800-53r4
HLAP-01	Do you support role-based access control (RBAC) for end-users?	CSC 14		9.2.2	PR.AC-4	3.1.1, 3.1.2, 3.1.7	AC-2, AC-3, AC-6
HLAP-02	Do you support role-based access control (RBAC) for system administrators?	CSC16		9.1.1	PR.AC-4, PR.PT-3	3.4.9	CM-11
HLAP-03	Can employees access customer data remotely?	CSC 12		6.2	PR.PT-3	3.1.12, 3.1.13, 3.1.14, 3.1.15, 3.1.8, 3.1.20, 3.7.5, 3.8.2, 3.13.7	AC-3, CM-7; NIST SP 800-46
HLAP-04	Can you provide overall system and/or application architecture diagrams including a full description of the data communications architecture for all components of the system?	CSC 2		12.1.1	ID.AM-1, ID.AM-2, ID.AM-4		CA-9, SC-4
HLAP-05	Does the system provide data input validation and error messages?	CSC 16		14.2.5	PR.DS-6		
HLAP-06	Do you employ a single-tenant environment?	CSC 12		14.2.5			RA-2
Authentication, Authorization, and Accounting		CIS Critical Security Controls v6.1	HIPAA	ISO 27002:2013	NIST Cybersecurity Framework	NIST SP 800-171r1	NIST SP 800-53r4
HLAA-01	Can you enforce password/passphrase aging requirements?	CSC 16		9.2.3, 9.3.1, 9.4.3	PR.AC-1	3.5.7	IA-5(1)
HLAA-02	Does your web-based interface support authentication, including standards-based single-sign-on? (e.g. InCommon)	CSC 16		9.1.1, 9.2.3, 9.3.1, 9.4.3	PR.AC-1	3.5.1	IA-2, IA-5
HLAA-03	Does your support integration with other authentication and authorization systems? List which ones (such as Active Directory, Kerberos and what version) in Additional Info?	CSC 16		9.4.3	PR.AC-1, PR.AC-4		
HLAA-04	Does the (servers/infrastructure) support external authentication services (e.g. Active Directory, LDAP) in place of local authentication?	CSC 16		9.4.3	PR.AC-1, PR.AC-4		
HLAA-05	Are audit logs available that include AT LEAST all of the following: login, logout, actions performed, and source IP address?	CSC 6		12.4	PR.PT-1	3.1.7, 3.3.2, 3.3.3, 3.3.4, 3.3.5, 3.4.3, 3.7.1, 3.7.6, 3.10.4, 3.10.5	AU-2(3), AU-6, AU-12, AC-6(9), CM-3, MA-2, MA-5, PE-3
Business Continuity Plan		CIS Critical Security Controls v6.1	HIPAA	ISO 27002:2013	NIST Cybersecurity Framework	NIST SP 800-171r1	NIST SP 800-53r4
HLBC-01	Do you have a documented Business Continuity Plan (BCP)?	CSC 10		17.1.1	PR.IP-9	3.12.2	AU-7, AU-9, IR-4, AC-5, CP-4, CP-10; NIST SP 800-34
HLBC-02	Is there a documented communication plan in your BCP for impacted clients?	CSC 10		17.1.2	PR.IP-9	3.12.2	AU-7, AU-9, IR-4, AC-5, CP-4, CP-10; NIST SP 800-34
HLBC-03	Are all components of the BCP reviewed at least annually and updated as needed to reflect change?	CSC 10		17.1.2	PR.IP-9	3.12.2	AU-7, AU-9, IR-4, AC-5, CP-4, CP-10; NIST SP 800-34
HLBC-04	Does your organization conduct an annual test of relocating to an alternate site for business recovery purposes?	CSC 10		17.1.3	PR.IP-9		AC-5, CP-4, CP-10; NIST SP 800-34
Change Management		CIS Critical Security Controls v6.1	HIPAA	ISO 27002:2013	NIST Cybersecurity Framework	NIST SP 800-171r1	NIST SP 800-53r4
HLCH-01	Do you have a documented and currently followed change management process (CMP)?	CSC 10		12.1.2	PR.IP-3	3.4.3, 3.4.4	CM-3, CM-4, CM-5
HLCH-02	Will the Institution be notified of major changes to your environment that could impact the Institution's security posture?	CSC 10		12.1.2			CM-3, CM-4, CM-5
HLCH-03	Do you have policy and procedure, currently implemented, guiding how security risks are mitigated until patches can be applied?	CSC 13	\$164.308(a)(1)(ii)(B)	12.6.1			CM-3, CM-4, CM-5
HLCH-04	Do procedures exist to provide that emergency changes are documented and authorized (including after the fact approval)?	CSC 10		12.1.2	PR.IP-3		CM-3, CM-4, CM-5
Data		CIS Critical Security Controls v6.1	HIPAA	ISO 27002:2013	NIST Cybersecurity Framework	NIST SP 800-171r1	NIST SP 800-53r4
HLDA-01	Do you physically and logically separate Institution's data from that of other customers?	CSC 12			PR.AC-2, PR.IP-5	3.1.3, 3.8.1	AC-4, MP-2, MP-4

ATTACHMENT D  
 SOURCING ALLIANCE ONE CARD RFP #2019.1  
 HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

HLDA-02	Is sensitive data encrypted in transport? (e.g. system-to-client)	CSC 13		8.2.3, 10.1.1	PR.DS-1, PR.DS-2	3.1.19, 3.8.1	MP-2, AC-19(5)
HLDA-03	Is sensitive data encrypted in storage (e.g. disk encryption, at-rest)?	CSC 13		8.2.3, 10.1.1	PR.DS-1	3.1.19, 3.8.1	MP-2, AC-19(5)
HLDA-04	Do backups containing institution data ever leave the Institution's Data Zone, either physically or via network routing?	CSC 13		12.3.1		3.8.9	CP-9, MP-5
HLDA-05	Do you have a media handling process, that is documented and currently implemented, including end-of-life, repurposing, and data sanitization procedures?	CSC 13		8.3.1	PR.DS-3	3.7.1, 3.7.2, 3.8.3	CP-9 MP-6, NIST SP 800-60, NIST SP 800-88, AC-2, AC-6, IA-4, PM-2, PM-10, SI-5, MA-2, MA-3, MP-6
HLDA-06	Is any institution data visible in system administration modules/tools?	CSC 13, CSC 14		14.2.5	PR.AC-4		
<b>Database</b>		<b>CIS Critical Security Controls v6.1</b>	<b>HIPAA</b>	<b>ISO 27002:2013</b>	<b>NIST Cybersecurity Framework</b>	<b>NIST SP 800-171r1</b>	<b>NIST SP 800-53r4</b>
HLDB-01	Does the database support encryption of specified data elements in storage?	CSC 13		10.1.1	PR.DS-1		
HLDB-02	Do you currently use encryption in your database(s)?	CSC 13		10.1.1	PR.DS-1, PR.DS-2		
<b>Datacenter</b>		<b>CIS Critical Security Controls v6.1</b>	<b>HIPAA</b>	<b>ISO 27002:2013</b>	<b>NIST Cybersecurity Framework</b>	<b>NIST SP 800-171r1</b>	<b>NIST SP 800-53r4</b>
HLDC-01	Will any institution data leave the Institution's Data Zone?	CSC 12		11.2.1			
HLDC-02	Does your company own the physical data center where the Institution's data will reside?	CSC 14		11.1.1	PR.AC-2, PR.IP-5		
HLDC-03	Does the hosting provider have a SOC 2 Type 2 report available?	CSC 13		11.1.1			
HLDC-04	Does the physical barrier fully enclose the physical space preventing unauthorized physical contact with any of your devices?	CSC 14		11.1.1, 11.1.2	PR.AC-2	3.8.1, 3.8.2	
<b>Disaster Recovery Plan</b>		<b>CIS Critical Security Controls v6.1</b>	<b>HIPAA</b>	<b>ISO 27002:2013</b>	<b>NIST Cybersecurity Framework</b>	<b>NIST SP 800-171r1</b>	<b>NIST SP 800-53r4</b>
HLDR-01	Do you have a Disaster Recovery Plan (DRP)?	CSC 10		17.1.1	PR.IP-9	3.12.2	AC-5, CP-4, CP-10 NIST SP 800-34
HLDR-02	Are any disaster recovery locations outside the Institution's Data Zone?	CSC 10, CSC 12		17.1.1	PR.IP-9		AC-5, CP-4, CP-10 NIST SP 800-34
HLDR-03	Are all components of the DRP reviewed at least annually and updated as needed to reflect change?	CSC 10		17.1.1	PR.IP-9	3.12.2	AC-5, CP-4, CP-10 NIST SP 800-34
<b>Firewalls, IDS, IPS, and Networking</b>		<b>CIS Critical Security Controls v6.1</b>	<b>HIPAA</b>	<b>ISO 27002:2013</b>	<b>NIST Cybersecurity Framework</b>	<b>NIST SP 800-171r1</b>	<b>NIST SP 800-53r4</b>
HLFI-01	Are you utilizing a web application firewall (WAF) and/or a stateful packet inspection (SPI) firewall?	CSC 9		13.1.1	PR.DS-5		
HLFI-02	Do you have a documented policy for firewall change requests?	CSC 9		12.1.2	PR.AC-5		
HLFI-03	Are you employing any next-generation persistent threat (NGPT) monitoring?	CSC 19		12.4.1		3.6.1, 3.14.6, 3.14.7	IR-2, IR-4, IR-9
HLFI-04	Do you monitor for intrusions on a 24x7x365 basis?	CSC 19		12.4.1	DE.CM-1, DE.CM-2, DE.CM-7	3.6.1, 3.14.6, 3.14.7	IR-2, IR-4, IR-10
<b>Physical Security</b>		<b>CIS Critical Security Controls v6.1</b>	<b>HIPAA</b>	<b>ISO 27002:2013</b>	<b>NIST Cybersecurity Framework</b>	<b>NIST SP 800-171r1</b>	<b>NIST SP 800-53r4</b>
HLPH-01	Does your organization have physical security controls and policies in place?	CSC 3		11.1.1	PR.AC-2, PR.AT-5, PR.IP-5, DE.CM-2	3.8.2, 3.10.1, 3.10.2, 3.10.5, 3.10.6, 3.12.1	MP-4, PE-2, PE-5, PE-6, PE-17
HLPH-02	Are employees allowed to take home customer data in any form?	CSC 13		8.2.3	PR.AC-2, PR.AC-4, PR.DS-1, PR.DS-3, PR.DS-5	3.8.1, 3.8.5, 3.8.7	MP-2, MP-5, MP-7
<b>Policies, Procedures, and Processes</b>		<b>CIS Critical Security Controls v6.1</b>	<b>HIPAA</b>	<b>ISO 27002:2013</b>	<b>NIST Cybersecurity Framework</b>	<b>NIST SP 800-171r1</b>	<b>NIST SP 800-53r4</b>
HLPP-01	Can you share the organization chart, mission statement, and policies for your information security unit?			5.1.1	ID.GV-2	3.9.1, 3.9.2	PM-2, PM-10, SI-5, CA-5, PM-1
HLPP-02	Are information security principles designed into the product lifecycle?	CSC 4		14.2.1	PR.IP-2	3.13.2	CA-5, CM-3, PM-1, SA-15, SA-3, SA-8, SC-2
HLPP-03	Do you have a formal incident response plan?	CSC 19		16.1.5	PR.IP-9	3.6.1, 3.12.2	CA-5, PM-1, IR-4, IR-5, IR-7, IR-8
HLPP-04	Do you have a documented information security policy?	CSC 17	\$164.308(a)(1)(i)	5.1.1	ID.GV-3		CA-5, PM-1
<b>Systems Management &amp; Configuration</b>		<b>CIS Critical Security Controls v6.1</b>	<b>HIPAA</b>	<b>ISO 27002:2013</b>	<b>NIST Cybersecurity Framework</b>	<b>NIST SP 800-171r1</b>	<b>NIST SP 800-53r4</b>
HLSY-01	Are systems that support this service managed via a separate management network?	CSC 12		13.1.1	PR.PT-4	3.1.3	AC-4
HLSY-02	Do you have a systems management and configuration strategy that encompasses servers, appliances, and mobile devices (company and employee owned)?	CSC 3		12.1.1	PR.IP-1, PR.IP-2	3.1.18, 3.7.1, 3.13.13	CM-2, CM-6, CM-3, AC-19, MA-2
<b>Vulnerability Scanning</b>		<b>CIS Critical Security Controls v6.1</b>	<b>HIPAA</b>	<b>ISO 27002:2013</b>	<b>NIST Cybersecurity Framework</b>	<b>NIST SP 800-171r1</b>	<b>NIST SP 800-53r4</b>
HLVU-01	Have your systems and applications had a third party security assessment completed in the last year?	CSC 4		12.6.1	DE.CM-8	3.11.1, 3.11.2, 3.11.3	SI-2
HLVU-02	Are your systems and applications scanned for vulnerabilities [that are remediated] prior to new releases?	CSC 4			DE.CM-8	3.11.1, 3.11.2, 3.11.3	SI-2

CIS 4  
 HIPAA 5  
 ISO 6  
 NIST 7  
 NIST SP 8  
 NIST SP 9

ATTACHMENT D

SOURCING ALLIANCE ONE CARD RFP #2019.1

HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

**HECVAT Lite: Assessment Report for Analysts** Version 2.0

HEISC Shared Assessments Working Group					
<b>Vendor Name</b>	Vendor Name			<b>Product Name</b>	Product Name and Version Information
<b>Vendor Contact Name</b>	Vendor Contact Name			<b>Product Description</b>	Brief Description of the Product
<b>Vendor Contact Title</b>	Vendor Contact Title			<b>HECVAT Version</b>	Lite
<b>Vendor Email Address</b>	Vendor Contact E-mail Address			<b>Date Prepared</b>	mm/dd/yyyy
<b>Institution's Security Framework</b>		< - Select your security framework.			

Report Sections	Max_Score	Score	Score %
Documentation	100	0	0%
Company	120	0	0%
Application Security	110	0	0%
Authentication, Authorization, and Accounting	100	0	0%
Business Continuity	55	0	0%
Change Management	80	0	0%
Data	225	0	0%
Database	80	0	0%
Datacenter	160	0	0%
Disaster Recovery	70	0	0%
Firewalls, IDS, IPS, and Networking	120	0	0%
Physical Security	80	0	0%
Policies, Procedures, and Processes	160	0	0%
Systems Management & Configuration	30	0	0%
Vulnerability Scanning	80	0	0%

**Qualitative Questions**

ID	Question	Vendor Answer	Compliant?
COMP-01	Describe your organization's business background and ownership structure, including all parent and subsidiary relationships.		0 <span style="color: red;">Please rate the vendor's answer</span>
COMP-02	Describe how long your organization has conducted business in this product area.		0 <span style="color: red;">Please rate the vendor's answer</span>
COMP-06	Do you have a dedicated Software and System Development team(s)? (e.g. Customer Support, Implementation, Product Management, etc.)		0 <span style="color: red;">Please rate the vendor's answer</span>
COMP-07	Use this area to share information about your environment that will assist those who are assessing your company data security program.		0 <span style="color: red;">Please rate the vendor's answer</span>

ATTACHMENT D

SOURCING ALLIANCE ONE CARD RFP #2019.1

HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

**HECVAT Lite: Assessment Summary Report** Version 2.0

<b>Vendor</b>	Vendor Name	<b>Product</b>	Product Name and Version Information
<b>Description</b>	Brief Description of the Product		
		Overall Score:	
		<b>F</b>	



**Non-Compliant Responses**

			Institution's Security Framework	
ID	Question	Additional Info	#N/A	
DOCU-04	Do you conform with a specific industry standard security framework? (e.g. NIST Cybersecurity Framework, ISO 27001, etc.)	#REF!	#REF!	#REF!
DOCU-06	Does your organization have a data privacy policy?	#REF!	#REF!	#REF!
COMP-04	Have you had a significant breach in the last 5 years?	#REF!	#REF!	#REF!
COMP-05	Do you have a dedicated Information Security staff or office?	#REF!	#REF!	#REF!
HLAP-01	Do you support role-based access control (RBAC) for end-users?	#REF!	#REF!	#REF!
HLAP-02	Do you support role-based access control (RBAC) for system administrators?	#REF!	#REF!	#REF!
HLAA-02	Does your web-based interface support authentication, including standards-based single-sign-on? (e.g. InCommon)	#REF!	#REF!	#REF!
HLCH-01	Do you have a documented and currently followed change management process (CMP)?	#REF!	#REF!	#REF!



ATTACHMENT D

SOURCING ALLIANCE ONE CARD RFP #2019.1

HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

HLDA-01	Do you physically and logically separate Institution's data from that of other customers?	#REF!	#REF!	#REF!
HLDA-02	Is sensitive data encrypted in transport? (e.g. system-to-client)	#REF!	#REF!	#REF!
HLDA-03	Is sensitive data encrypted in storage (e.g. disk encryption, at-rest)?	#REF!	#REF!	#REF!
HLDA-04	Do backups containing institution data ever leave the Institution's Data Zone, either physically or via network routing?	#REF!	#REF!	#REF!
HLDA-05	Do you have a media handling process, that is documented and currently implemented, including end-of-life, repurposing, and data sanitization procedures?	#REF!	#REF!	#REF!
HLDB-01	Does the database support encryption of specified data elements in storage?	#REF!	#REF!	#REF!
HLDB-02	Do you currently use encryption in your database(s)?	#REF!	#REF!	#REF!
HLDC-01	Will any institution data leave the Institution's Data Zone?	#REF!	#REF!	#REF!
HLDC-02	Does your company own the physical data center where the Institution's data will reside?	#REF!	#REF!	#REF!
HLDC-03	Does the hosting provider have a SOC 2 Type 2 report available?	#REF!	#REF!	#REF!
HLDC-04	Does the physical barrier fully enclose the physical space preventing unauthorized physical contact with any of your devices?	#REF!	#REF!	#REF!
HLDR-02	Are any disaster recovery locations outside the Institution's Data Zone?	#REF!	#REF!	#REF!
HLFI-02	Do you have a documented policy for firewall change requests?	#REF!	#REF!	#REF!
HLFI-03	Are you employing any next-generation persistent threat (NGPT) monitoring?	#REF!	#REF!	#REF!
HLFI-04	Do you monitor for intrusions on a 24x7x365 basis?	#REF!	#REF!	#REF!
HLPH-01	Does your organization have physical security controls and policies in place?	#REF!	#REF!	#REF!

# ATTACHMENT D

## SOURCING ALLIANCE ONE CARD RFP #2019.1

### HIGHER EDUCATION CLOUD VENDOR ASSESSMENT TOOL

The logo for EDUCAUSE, featuring the word "EDUCAUSE" in white, uppercase letters on a dark red rectangular background.

#### Acknowledgments

The Higher Education Information Security Council Shared Assessments Working Group contributed their vision and significant talents to the conception, creation, and completion of this resource.

Members that contributed to Phase III (2018) of this effort are:

- Jon Allen, Baylor University
- Josh Callahan, Humbolt State University
- Susan Coleman, REN-ISAC
- Charles Escue, Indiana University
- Joanna Grama, EDUCAUSE
- Todd Herring, REN-ISAC
- Jefferson Hopkins, Purdue University
- Alex Jalso, West Virginia University
- Nick Lewis, Internet2
- Kim Milford, REN-ISAC
- Amanda Sarratore, University of Notre Dame
- Gary Taylor, York University
- Valerie Vogel, EDUCAUSE
- Gene Willacker, Michigan State University
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- Jon Allen, Baylor University
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- Nick Lewis, Internet2
- Kim Milford, REN-ISAC
- Craig Munson, Minnesota State Colleges & Universities
- Mitch Parks, University of Idaho



**New Vendor Request Form - \* indicates a required field**

**Submit this request with an IRS W-9 Form.**

Respondent Contact \_\_\_\_\_ \*Email \_\_\_\_\_

**Ordering Address/Information**

\*Company/Individual Name \_\_\_\_\_

\*Doing Business As (DBA) \_\_\_\_\_

\*US Citizen Yes No Business EIN # \_\_\_\_\_ or SS# \_\_\_\_\_

\*Address \_\_\_\_\_

\*City \_\_\_\_\_ \*State \_\_\_\_\_ \*Zip \_\_\_\_\_ \*E-Mail \_\_\_\_\_

Country (If not U.S.) \_\_\_\_\_ Website Address \_\_\_\_\_

\*Phone # \_\_\_\_\_ Fax # \_\_\_\_\_

Remit to Address (if different than above) \_\_\_\_\_

\*City \_\_\_\_\_ \*State \_\_\_\_\_ \*Zip \_\_\_\_\_

\*Preferred method of PO distribution Email Fax

**\*Detailed Description of Goods/Services being Provided:**

\_\_\_\_\_

**Company Group Purchasing Organizations/Contracts (list GPO and contract #'s):**

\_\_\_\_\_

**Supplier Class** – list if Disabled Business, Minority Vendor, EDGE Certified, Veteran Owned, MBE Ohio Certified, etc.

\_\_\_\_\_

\*Print Name \_\_\_\_\_

\*Vendor Signature \_\_\_\_\_

By signing this form, vendor is certifying that all information provided is correct and reliable and vendor is not suspended or expelled by the Federal Government or State of Ohio from joining in Federal or State funded projects. Standard Payment terms are net 30 days.

Procurement Use Only: C.O.I. | DB. | Approve \_\_\_ Deny \_\_\_

This Agreement entered into as of the date of **Month** in the year of **year**.

**Commented [DA1]:** Each area of the Agreement template that must be updated on a case-by-case basis is highlighted in **yellow**. Replace the highlighted text with the appropriate information and eliminate the yellow highlight. The easiest way to do that is double click on the highlighted text and simply type in the information – the highlight will disappear.

## GROUP PURCHASING AGREEMENT

*between*

Cooperative Council of Governments  
6001 Cochran Road, Suite 333  
Cleveland, Ohio 44139

*and*

**Winning Supplier**  
Street Address 1  
Street Address 2  
City, State Zip

*and*

Collaborent Group, Ltd.  
6001 Cochran Road, Suite 333  
Cleveland, Ohio 44139

## Table of Contents

SECTION 1. RECITALS.....	1
SECTION 2. BUSINESS TERMS .....	2
2.1. <u>Appendices</u> .....	2
2.2. <u>Terms in Appendices</u> .....	2
2.3. <u>Utilization of Products &amp; Services</u> .....	2
2.4. <u>Personnel &amp; Equipment</u> .....	2
2.5. <u>Rates &amp; Charges</u> .....	3
2.6. <u>Publicity &amp; Joint Marketing</u> .....	3
2.7. <u>Joint Prospecting; Registration</u> .....	3
SECTION 3. TERMS & CONDITIONS.....	4
3.1. <u>Independent Contractors</u> .....	4
3.2. <u>Operational Control</u> .....	4
3.3. <u>Technical Systems; Intellectual Property</u> .....	4
3.4. <u>Non-Solicitation</u> .....	5
3.5. <u>Confidentiality</u> .....	5
3.6. <u>Indemnification</u> .....	5
3.7. <u>Notice &amp; Opportunity to Defend; Limitations &amp; Thresholds</u> .....	6
3.8. <u>Winning Supplier Insurance</u> .....	6
3.9. <u>Termination Rights</u> .....	7
3.10. <u>Effects of Termination</u> .....	7
3.11. <u>Audit of Winning Supplier</u> .....	8
3.12. <u>Force Majeure</u> .....	8
3.13. <u>Notices</u> .....	8
3.14. <u>Waiver</u> .....	8
3.15. <u>Governing Law; Invalidity</u> .....	8
3.16. <u>Modification</u> .....	8
3.17. <u>Assignment</u> .....	9
3.18. <u>No Third Party Beneficiaries; Survival of Representations</u> .....	9
3.19. <u>Entire Agreement</u> .....	9
3.20. <u>Execution in Counterparts</u> .....	9
3.21. <u>Titles, Headings &amp; Recitals</u> .....	9

3.22. <u>Severability</u> .....	9
3.23. <u>Mediation; Arbitration</u> .....	9
3.24. <u>Nondiscrimination &amp; Intimidation</u> .....	10
APPENDIX A: TERM OF AGREEMENT; NOTICES .....	12
APPENDIX B: PRODUCTS & SERVICES; PRICING .....	13
APPENDIX C: WINNING SUPPLIER REPORTING REQUIREMENTS .....	14
APPENDIX D: TRADEMARKS & LOGOS .....	15
APPENDIX E: WINNING SUPPLIER CUSTOMER AGREEMENTS .....	16
APPENDIX F: ROLES & RESPONSIBILITIES .....	17
APPENDIX G: FINANCIAL TERMS .....	20
APPENDIX H: PRIMARY POINTS OF CONTACT .....	21
APPENDIX I: PROSPECTIVE PARTICIPANTS .....	22

THIS GROUP PURCHASING AGREEMENT (this "**Agreement**"), effective as of **Month day, year** (the "**Effective Date**"), is entered into by and between the Cooperative Council of Governments, Inc., an Ohio not-for-profit corporation organized as a regional council of governments under Chapter 167 of the Ohio Revised Code, with its principal place of business at 6001 Cochran Road, Suite 333, Cleveland, Ohio 44139 ("**CCOG**"), Winning Supplier, a **State** corporation with its principal place of business at **street address, City, State Zip** ("**Winning Supplier**"), and Collaborant Group, Ltd., an Ohio limited liability corporation, with its principal place of business at 6001 Cochran Road, Suite 333, Cleveland, Ohio 44139 ("**Collaborant**"). Throughout this Agreement, CCOG, Winning Supplier, and Collaborant are referred to interchangeably as in the singular "**Party**" or in the plural "**Parties**."

**Commented [DA2]:** Defined terms are ("**Bolded**") for ease of reference when reviewing the Agreement.

**Commented [DA3]:** Insert the supplier trade name (e.g., Office Depot, Inc. becomes Office Depot). Do a search for "Winning Supplier" and replace with "Trade Name".

## SECTION 1. RECITALS

A. "**CCOG**" is a Council of Governments formed under Chapter 167 of the Ohio Revised Code and established for the purpose of (a) developing and implementing certain sound business practices and processes as shared services to be made available to its members, and (b) developing and operating as a collective purchasing and service organization to enable its members to obtain competitive terms from vendors and service providers by utilizing the combined purchasing power of all of its members, and doing all things lawful, compliant, and necessary or appropriate to accomplish its purpose.

B. Collaborant is the third-party procurement administrator for, and duly authorized agent of, CCOG, and in that role manages the procurement, marketing, sales, reporting, and financial activities of, for, and on behalf of CCOG, at the direction and with the authorization of the CCOG Board of Directors.

C. CCOG makes its collective purchasing programs and other services available through the Sourcing Alliance Network ("**Sourcing Alliance**"), a collaboration of local, regional, and national group purchasing organizations and public sector contract holders to make already-procured contracts for various products and services ("**SA Products & Services**") held by those group purchasing organizations and public sector contract holders (collectively, the "**Contract Holders**"), such as CCOG, available to entities that join Sourcing Alliance.

D. To the extent that the laws of a particular state, region, territory, and/or country permit, any public sector entity may join Sourcing Alliance as a member ("**Member**"). The term "**Public Sector Entities**" includes, but is not limited to, political subdivisions, municipal corporations, counties, townships, villages, school districts, special districts, public institutions of higher education or training, units of government, state/regional/territorial agencies, state/regional/territorial governments, federal/national agencies, and federal/national governments, and other entities receiving financial support from tax monies and/or public funds.

E. Any organization that is exempt from federal income tax under the IRS Code, and any other entity if permitted under the IRS Code and other applicable law, including private companies, may also join Sourcing Alliance as a Member.

F. Sourcing Alliance makes SA Products & Services available through groups and associations ("**Association Partners**") that contract with Sourcing Alliance and/or its Contract Holders for the purpose of providing additional benefits to the members of such Association Partners.

G. Members, Association Partners, and Association Partners' members are referred to throughout this Agreement as participants (the "**Participants**").

H. Collaborant is the administrative representative for Sourcing Alliance and actively promotes SA Products & Services to current and prospective Participants through a range of marketing, prospecting, and sales strategies, including, but not limited to, marketing and sales collateral development, direct mail, web marketing, electronic communications, attendance at events, Collaborant's outbound call center, eMarketplace, Winning Supplier sales representative training, and field sales support (collectively, "**Collaborant Services**").



I. CCOG and Collaborant work with third-party suppliers ("Suppliers") of various goods and services to reduce Suppliers' customer acquisition costs, lower the administrative burden of Suppliers contracting separately with individual Participants, improve customer service levels for Participants, reduce Participants' total cost of ownership of various goods and services, and increase total Supplier revenue.

J. CCOG and Youngstown State University issued a request for proposal ("RFP") #2019.1 dated Month day, year for describe the products & services listed in the RFP (the "Products & Services"), and CCOG selected Winning Supplier as the lowest responsive and responsible bidder.

K. Winning Supplier desires to promote and expand its operations and increase the sales of its Products & Services to public sector, private sector, and not-for-profit organizations through Sourcing Alliance.

L. CCOG and Collaborant agree to make the Products & Services from Winning Supplier available to Sourcing Alliance Participants and Winning Supplier agrees to provide the same to Sourcing Alliance Participants subject to the terms of this Agreement.

NOW, THEREFORE, in consideration of the mutual promises contained herein, the Parties agree to the following terms and conditions:

## SECTION 2. BUSINESS TERMS

2.1. **Appendices**. Winning Supplier agrees to provide the Products & Services as may be agreed to by the Parties in accordance with the specific terms and conditions set forth in this Agreement and the appendices attached hereto and made a part of this Agreement (if one, an "Appendix" or more, "Appendices").

- (i) **Appendix A** defines the Term of this Agreement and addresses for Notices.
- (ii) **Appendix B** sets forth the Products & Services available to Participants under this Agreement and pricing.
- (iii) **Appendix C** defines Winning Supplier's reporting requirements.
- (iv) **Appendix D** identifies each Party's trademarks and logos authorized for use by the other Parties, subject to the terms of this Agreement.
- (v) **Appendix E** provides sample Winning Supplier Customer Agreements between Winning Supplier and a Participant who chooses to purchase Products & Services from Winning Supplier.
- (vi) **Appendix F** sets forth the roles and responsibilities of the Parties.
- (vii) **Appendix G** defines the financial terms between the Parties.
- (viii) **Appendix H** identifies the Parties' primary points of contact.
- (ix) **Appendix I** identifies the Prospective Participants subject to this Agreement.

2.2. **Terms in Appendices**. In all cases where the terms of this Agreement and any Appendices are in disagreement, the terms in the Appendix shall control.

2.3. **Utilization of Products & Services**. Purchases of the Products & Services from Winning Supplier may only be made by any Participant upon execution of such credit applications, forms, customer agreements, appendices, or other documentation as mutually agreed upon by the Parties. Standardized, mutually approved customer agreements ("Customer Agreements") may be attached hereto in **Appendix E**.

2.4. **Personnel & Equipment**. The Parties agree that the number and types of any subcontractors, personnel, or specialized equipment which may be required to furnish the Products & Services to Participants will be determined by Winning Supplier. Winning Supplier agrees to engage the number and types of subcontractors, personnel, and/or

**Commented [DA4]:** This Agreement is structured such that key business terms which may change or evolve are incorporated in Appendices; basic legal terms are included in the body of the Agreement. This structure allows the Parties to easily update business terms as conditions warrant without having to amend or restate the entire Agreement.

**Commented [DA5]:** All references to Sections and Appendices within this agreement are **Bolded & Underlined** for ease of reference.

**Commented [DA6]:** This Section included to protect Winning Supplier.

**Commented [DA7]:** This Section included to protect Winning Supplier.

specialized equipment necessary to furnish the types of Products & Services as specified in Appendix B to all Participants throughout the Term of this Agreement, as defined in Appendix A.

2.5. Rates & Charges. The rates, fees, and charges to be charged to and paid by Participants for the Products & Services are set forth in Appendix B. Winning Supplier agrees that there are no other applicable rates, fees, charges, or other monetary incentives except those set forth in Appendix B. The Administrative Fees to be paid by Winning Supplier to Collaborator are set forth in Appendix G. If the application of any rate, fee, charge, or other monetary incentive as set forth in Appendix G will create a hardship to Winning Supplier, CCOG, or Collaborator, the applicable rate, fee, or charge may be equitably adjusted to prevent such hardship pursuant to the terms of Appendix G, upon mutual written agreement of the Parties.

**Commented [DA8]:** This terminology included to protect all Parties.

2.6. Publicity & Joint Marketing.

(a) Publicity. A Party may only issue press releases or other public announcements with respect to this Agreement with the prior, written consent of the other Parties.

**Commented [DA9]:** This Section included to protect all Parties.

(b) Joint Marketing / Logo & Name Use. Winning Supplier authorizes CCOG and Collaborator to use Winning Supplier's trademarks and logos identified in Appendix D ("Winning Supplier Trademarks"). CCOG authorizes Winning Supplier to use CCOG's trademarks and logos identified in Appendix D ("CCOG's Trademarks"). Collaborator authorizes Winning Supplier to use Collaborator's trademarks and logos identified in Appendix D ("Collaborator's Trademarks"). Each Parties' use of such trademarks will be limited solely to joint marketing efforts, including, but not limited to, utilizing the same on correspondence, collateral, agreements, websites, newsletters, or other marketing materials promoting the Products & Services.

**Commented [DA10]:** This Section included for practical and efficiency purposes. It is not reasonable to require prior, written consent for each use, web page update, collateral edit, etc.

(c) Use of Name/Logo. Winning Supplier authorizes CCOG and Collaborator to utilize Winning Supplier's Trademarks and name in standard communication, including correspondence, newsletters, and website material. CCOG and Collaborator respectively authorize Winning Supplier to utilize CCOG's Trademarks and Collaborator's Trademarks and name in standard communication, including correspondence, newsletters, and website material.

**Commented [DA11]:** This Section included for practical and efficiency purposes to ensure Parties are explicitly authorized to market Products & Services and grow sales.

2.7. Joint Prospecting; Registration.

(a) Joint Prospecting. The Parties agree to identify and jointly market the Services to prospective Participants ("Prospective Participants"). Such Prospective Participants will be listed in Appendix I, as updated from time to time upon the mutual written consent of Winning Supplier and Collaborator. Winning Supplier will identify, mark, register, or code each Prospective Participant as a Sourcing Alliance account within its tracking system. Any Prospective Participants who become customers of Winning Supplier during the Term of this Agreement will be considered Participants subject to the terms and conditions of this Agreement, including the payment of Administrative Fees as defined in Appendix G. Winning Supplier will not directly or indirectly, through any representative, agent or otherwise, solicit or entertain offers from, respond to bids, quotes, or requests for proposals solicitations, or negotiate with any Prospective Participants relating to the acquisition of Products & Services offered by Winning Supplier through this Agreement to such Prospective Participants unless such Products & Services are made available to such Prospective Participants through and under the terms of this Agreement, including the pricing for Products & Services as defined in Appendix B.

**Commented [DJA12]:** This Section clearly identifies the process to register potential Winning Supplier customers that will be subject to the terms of this Agreement and the payment of Administrative Fees.

(b) Registration. Prospective Participants may be identified jointly by Winning Supplier and Collaborator, by Winning Supplier and proposed to Collaborator, or by Collaborator and proposed to Winning Supplier. Winning Supplier and Collaborator shall designate senior executives with the authority to approve the registration of proposed Prospective Participants under this Agreement, and no proposed Prospective Participants shall be approved as Prospective Participants subject to the terms of this Agreement without the written approval (including via email) of a designated senior executive from both Winning Supplier and Collaborator. The Party receiving the registration approval request will have ten (10) business days to respond and approve or disapprove of each registration request in writing, including via email. Such approval shall not

be unreasonably withheld, and all approved Prospective Participants shall be listed in Appendix I as updated. Winning Supplier will provide Collaborant with the name of the Winning Supplier branch and Winning Supplier sales representative (if applicable) to whom each registered Prospective Participants is assigned, and such information shall also be included in Appendix I.

## SECTION 3. TERMS & CONDITIONS

3.1. **Independent Contractors.** In the performance of this Agreement, Winning Supplier will be an independent contractor to CCOG and Collaborant, and will not be or act as, or be deemed to otherwise be an agent, employee, or representative of CCOG, Collaborant, or any Participant. CCOG and Collaborant will be independent contractors to Winning Supplier, and will not be or act as, or be deemed to be agents, employees, or representatives of Winning Supplier. Winning Supplier's employees will not be deemed to be CCOG's and/or Collaborant's employees or employees of any Participant, and CCOG's and Collaborant's employees will not be deemed to be Winning Supplier's employees. Nothing contained in an Appendix or this Agreement may be construed to be inconsistent with that relationship or status. No Party exercises direct control or supervision over the employees of the other Parties and, in fact, each Party disavows any right to do so, and no Party in any way directs the operations of the other Parties or the manner of the other Parties' performance. No partnership, joint venture, or other relationship between the Parties or any Participant is created hereby.

**Commented [DA13]:** This Section included to protect all Parties and is mutual.

3.2. **Operational Control.**

(a) **Winning Supplier Control.** As between the Parties, Winning Supplier will have sole and exclusive control over the manner in which Winning Supplier and its employees, subcontractors, and suppliers deliver the Products & Services. Winning Supplier will engage, employ, or subcontract with such individuals or other entities as it may deem necessary in connection therewith, provided, however, that Winning Supplier furnishes the types and quantities of Products & Services specified in Appendix B to all Participants purchasing Products & Services throughout the Term of this Agreement, and Winning Supplier executes its roles and responsibilities in accordance with Appendix F throughout the Term of this Agreement. Such individuals will not be considered employees or subcontractors of CCOG, Collaborant, or any Participant, and will be subject to employment or engagement, and discharge, discipline, and control solely and exclusively by Winning Supplier.

**Commented [DA14]:** This Section included to protect Winning Supplier and Collaborant, both of which have operational responsibilities under this Agreement, and is mutual. CCOG is not included in this Section because CCOG is serving as the Public Sector Contract Holder and does not have day-to-day operational responsibilities.

(b) **Collaborant Control.** As between the Parties, Collaborant will have sole and exclusive control over the manner in which Collaborant and its employees, subcontractors, and suppliers deliver the Collaborant Services. Collaborant will engage, employ, or subcontract with such individuals or other entities as it may deem necessary in connection therewith, provided, however, that Collaborant executes its roles and responsibilities in accordance with Appendix F throughout the Term of this Agreement. Such individuals will not be considered employees or subcontractors of CCOG, Winning Supplier, or any Participant, and will be subject to employment or engagement, and discharge, discipline, and control solely and exclusively by Collaborant.

(c) **Taxes.** Except as otherwise specified herein, each Party will be solely responsible for the payment of any and all wages and fringe benefits, local, state, and federal payroll taxes or contribution of taxes for unemployment insurance, pensions, workers' compensation, and other Social Security and related protection with respect to those employees engaged by that Party pursuant to the performance of this Agreement. Each Party will make and submit, in its name, all reports and payments required by federal, state, or local laws related to its employees.

3.3. **Technical Systems; Intellectual Property.** Winning Supplier will retain title to its proprietary systems and methodologies used in connection with the delivery of Products & Services during the course of this Agreement, including, but not limited to, descriptions of the systems or methodologies, document templates, and/or project tools and software, whether owned by Winning Supplier or licensed to Winning Supplier by a third Party and incorporated

**Commented [DA15]:** This Section included to protect Winning Supplier.

into any sale of Products & Services (“**Winning Supplier Systems and Methods**”). As needed, Winning Supplier shall grant a limited license to all Participants subject to this Agreement to use Winning Supplier’s Systems & Methods during the Term of this Agreement and for the duration of any Customer Agreements established between Winning Supplier and a Participant to purchase Products & Services subject to the terms of this Agreement until such Customer Agreements expire or are terminated

3.4. **Non-Solicitation.** During the Term of this Agreement and for a period of twelve (12) months following the termination or expiration of this Agreement, no Party will solicit, or cause any other person to solicit, any employees or contractors of another Party who are or were employed or engaged by that other Party during the prior twelve (12) months.

**Commented [DA16]:** This Section included to protect all Parties and is mutual.

3.5. **Confidentiality.**

**Commented [DA17]:** This Section included to protect all Parties and is mutual.

(a) **Obligation.** The nature and details of the business relationship covered by this Agreement, and the business information regarding the other Party(ies) (the “**Disclosing Party**”) to which a Party(ies) (the “**Receiving Party**”) may become privy during the Term of this Agreement (collectively, the “**Information**”) constitute confidential and proprietary information, the disclosure, copying, or distribution of which could result in competitive harm to the Disclosing Party. Each Party agrees to maintain the other Party’s Information in the strictest confidence and agrees not to disclose, copy, or distribute the other Party’s Information, whether orally or in writing, directly or indirectly, in whole or in part, except to those of the Receiving Party’s employees, agents, and subcontractors with a need to know the Information. The foregoing will not limit either Receiving Party, for purposes of marketing, from informing actual or potential Participants of the existence of a contractual relationship between the Parties. The Parties further agree that they will require that all of their employees, agents, and subcontractors abide by the terms of these confidentiality obligations. The confidentiality obligations set forth in this Section will continue in effect for the Term of this Agreement and for a period of two (2) years after the date this Agreement is terminated or expires.

(b) **Exceptions.** Nothing herein will apply to any information (a) which is or becomes generally available to the public other than as a result of a disclosure by a Receiving Party or its representatives, (b) which was available on a non-confidential basis prior to its disclosure by the Disclosing Party or its representatives, (c) which becomes available to a Receiving Party on a non-confidential basis from a source other than the Disclosing Party or its representatives, provided that such source is not known to be subject to any prohibition against transmitting the information, (d) which is disclosed pursuant to an order of court; provided that in the event that proprietary information is disclosed or threatened to be disclosed pursuant to this clause (d), the Receiving Party will give the original Disclosing Party prompt, written Notice, as defined in **Section 3.13**, at the Addresses for Notices set forth in **Appendix A** of such threatened disclosure and the right to defend against such disclosure, at its expense, and provided further that the original Receiving Party will cooperate reasonably in such defense, or (e) which is subject to a Freedom of Information Act Request or other public records request to which a Party is, or may be, required to respond by applicable law.

3.6. **Indemnification.**

**Commented [DA18]:** This Section included to protect all Parties and is mutual, with the exception of “strict products liability”, which only applies to Winning Supplier as the provider of Products & Services.

(a) **Winning Supplier Indemnification.** Except as otherwise provided herein and to the extent permitted by law, Winning Supplier shall indemnify, defend, and hold harmless (“**Indemnifying Party**”) CCOG and Collaborant, and their respective officers, directors, employees, subcontractors, agents, and all Participants subject to this Agreement (the “**Indemnified Party**”) from and against any and all liabilities, damages, fines, penalties, costs, claims, interest, and expenses (including costs of defense, settlement, and reasonable attorneys’ fees), including any claim arising from environmental health and safety laws or regulations, which are generated by claims, allegations, actions, causes of action, demands, assertions, adjudications, or suits which arise out of damage to or destruction of any property, or bodily injury (including death) suffered by any person including the Indemnified Party (“**Losses**”) to the extent they are caused by gross negligence, willful misconduct, noncompliance with applicable laws, or strict products liability of the Indemnifying Party or its agents, employees, and subcontractors. With respect to a claim under this

Agreement, the liability of the Indemnifying Party is limited to the extent of such Indemnifying Party's gross negligence, willful misconduct, noncompliance with applicable laws, or strict products liability.

(b) **CCOG Indemnification.** Except as otherwise provided herein and to the extent permitted by law, CCOG shall indemnify, defend, and hold harmless ("**Indemnifying Party**") Winning Supplier, its officers, directors, employees, subcontractors, and agents subject to this Agreement (the "**Indemnified Party**") from and against any and all liabilities, damages, fines, penalties, costs, claims, interest, and expenses (including costs of defense, settlement, and reasonable attorneys' fees), including any claim arising from environmental health and safety laws or regulations, which are generated by claims, allegations, actions, causes of action, demands, assertions, adjudications, or suits which arise out of damage to or destruction of any property, or bodily injury (including death) suffered by any person including the Indemnified Party ("**Losses**") to the extent they are caused by gross negligence, willful misconduct, or noncompliance with applicable laws of the Indemnifying Party or its agents, employees, and subcontractors. With respect to a claim under this Agreement, the liability of the Indemnifying Party is limited to the extent of such Indemnifying Party's gross negligence, willful misconduct, or noncompliance with applicable laws.

(c) **Collaborant Indemnification.** Except as otherwise provided herein and to the extent permitted by law, Collaborant shall indemnify, defend, and hold harmless ("**Indemnifying Party**") Winning Supplier, its officers, directors, employees, subcontractors, and agents subject to this Agreement (the "**Indemnified Party**") from and against any and all liabilities, damages, fines, penalties, costs, claims, interest, and expenses (including costs of defense, settlement and reasonable attorneys' fees), including any claim arising from environmental health and safety laws or regulations, which are generated by claims, allegations, actions, causes of action, demands, assertions, adjudications, or suits which arise out of damage to or destruction of any property, or bodily injury (including death) suffered by any person including the Indemnified Party ("**Losses**") to the extent they are caused by gross negligence, willful misconduct, or noncompliance with applicable laws of the Indemnifying Party or its agents, employees, and subcontractors. With respect to a claim under this Agreement, the liability of the Indemnifying Party is limited to the extent of such Indemnifying Party's gross negligence, willful misconduct, or noncompliance with applicable laws.

### 3.7. **Notice & Opportunity to Defend: Limitations & Thresholds.**

(a) **Notice; Opportunity.** If any Losses are asserted against an Indemnified Party, such Indemnified Party will notify the Indemnifying Party as promptly as practicable and give it an opportunity to defend the same. The Indemnified Party will reasonably cooperate with the Indemnifying Party in connection with such defense. In the event that the Indemnifying Party in connection with such claim fails to defend against the claim within thirty (30) days after Notice of such claim, the Indemnified Party will be entitled to assume the defense thereof, and the Indemnifying Party will be liable to repay the Indemnified Party entitled to indemnification for all its expenses reasonably incurred in connection with said defense (including reasonable attorneys' fees and settlement payments) until the Indemnifying Party assumes such defense. The attorneys selected by the Indemnifying Party to prosecute such defense on behalf of an Indemnified Party must be acceptable to the Indemnified Party, which acceptance will not be unreasonably withheld.

(b) **Liability.** Notwithstanding any other provision of this Agreement, indemnity obligations entered into hereunder will be due only to the extent of the Losses actually suffered by an Indemnified Party (i.e., reduced by any offsetting or related asset or service received and any recovery from any third Party). The Indemnifying Party will be subrogated to all rights of the Indemnified Party against any third party with respect to any claim for which indemnity was paid.

3.8. **Winning Supplier Insurance.** During the Term of this Agreement, and for two (2) years following expiration or termination of this Agreement, Winning Supplier, at its own expense, will maintain and will require that its agents, subcontractors, or suppliers engaged in Winning Supplier's performance of its duties under this Agreement, maintain general liability insurance, property insurance, and automobile insurance (at a minimum, in the amount of \$1,000,000 per occurrence/\$5,000,000 annual aggregate) applicable to any claims, liabilities, damages, costs, or expenses arising

**Commented [DA19]:** This Section included to protect all Parties and is mutual.

**Commented [DA20]:** This Section included to protect CCOG, Collaborant, and Participants.

out of its performance under this Agreement, or any Appendix, and with respect to, or arising out of, Winning Supplier's provision of Products & Services to Participants. CCOG, Collaborant, and their respective officers, directors, employees, and agents will be named as additional insureds on Winning Supplier's related insurance policies. All such insurance policies will incorporate a provision requiring the giving of written Notice, as defined in [Section 3.13](#), to CCOG and Collaborant at least thirty (30) days prior to the cancellation, nonrenewal, and/or material modification of any such policies. Winning Supplier shall submit to Collaborant within ten (10) calendar days after the Effective Date of this Agreement, and prior to furnishing Products & Services to any Participants, valid certificates evidencing the effectiveness of the foregoing insurance policies. Winning Supplier shall provide such valid certificates on an annual basis until the terms of this [Section 3.8](#) are no longer applicable.

3.9. **Termination Rights.** The Parties will have the termination rights set forth below.

(a) **Insolvency.** If a petition in bankruptcy is filed by any Party, or if any Party is adjudicated as bankrupt, or if any Party makes a general assignment for the benefit of creditors, or if a receiver is appointed on account of the insolvency of any Party, then the other Parties, without prejudice to any other right or remedy, may terminate this Agreement upon giving at least five (5) business days prior written Notice of such termination.

(b) **Mutual Consent.** This Agreement, or any Appendix, may be terminated at any time by the mutual written consent of the Parties.

(c) **Breach.** In the event any Party commits a material breach of its obligations under this Agreement, except for a payment obligation, the non-breaching Party(ies) may provide written Notice describing the material breach to the breaching Party. The breaching Party will have thirty (30) calendar days to cure such breach or provide acceptable reassurance to the non-breaching Party(ies), or, if the Parties agree that a cure or reassurance is not feasible within thirty calendar (30) days, such period of time for cure or satisfactory reassurance as the Parties may agree in writing. If the breach is not cured within such period or if satisfactory reassurance is not accepted by the non-breaching Party(ies) in such period, then the Party(ies) not in breach may terminate this Agreement upon ten (10) business days written Notice at the Addresses for Notices set forth in [Appendix A](#) following the expiration of the thirty (30) day cure period.

3.10. **Effects of Termination.**

(a) **Insolvency or Breach of CCOG or Collaborant.** Upon termination of this Agreement as a result of the insolvency of CCOG or Collaborant as defined in [Section 3.9 \(a\)](#) or an uncured breach of CCOG or Collaborant as defined in [Section 3.9 \(c\)](#), ongoing Administrative Fee or other payments as set forth in [Appendix G](#) from Winning Supplier to Collaborant will cease as of the date of termination; Winning Supplier must nonetheless pay to Collaborant, or such other party as ordered by a court of competent jurisdiction, in full any Administrative Fee or other payments owed to Collaborant through the date of the termination.

(b) **Insolvency or Breach of Winning Supplier.** Upon termination of this Agreement as a result of the insolvency of Winning Supplier as defined in [Section 3.9 \(a\)](#) or breach of Winning Supplier as defined in [Section 3.9 \(c\)](#), Winning Supplier must continue making Administrative Fee and other payments as set forth in [Appendix G](#) to Collaborant that are generated by individual Participant's utilization of the Products & Services throughout the term of each individual Participant's contract or Customer Agreement with Winning Supplier to the extent that Winning Supplier continues to generate revenue from each Participant's utilization of the Products & Services.

(c) **End of Term.** If this Agreement terminates due to expiration of this Agreement, Winning Supplier must continue to pay all Administrative Fees and other payments as set forth in [Appendix G](#) from each individual Participant for a period of either i) one (1) year from the date of termination, or ii) throughout the term of each individual Participant's contract or Customer Agreement with Winning Supplier, whichever is

**Commented [DA21]:** This Section included to clearly define the circumstances under which this Agreement may be terminated.

**Commented [DA22]:** This Section provides incentive to Collaborant and CCOG to fully comply with the terms of the Agreement or forfeit ongoing Administrative Fees.

**Commented [DA23]:** This Section provides incentive to Winning Supplier to fully comply with the terms of the Agreement or suffer a financial penalty. Option 1 applies to Winning Suppliers who typically enter into customer agreements with Participants for a defined term. Option 2 applies to Winning Suppliers who typically provide Products & Services to Participants WITHOUT entering into a customer agreement.

**Commented [DA24]:** This Section ensures that Collaborant and CCOG continue to participate in ongoing revenue streams generated through customer agreements or customer relationships that i) were established using this Agreement as a contract vehicle, and ii) extend beyond the Term of this Agreement. This clause enables customer agreements or customer relationships established subject to this Agreement to extend beyond the Term of this Agreement, rather than be coterminous with this Agreement.



longer, to the extent that Winning Supplier continues to generate revenue from each Participant's utilization of the Products & Services following the expiration of this Agreement.

(d) **Mutual Written Consent.** Upon termination of this Agreement as a result of the mutual written agreement of the Parties, Winning Supplier must continue to pay all Administrative Fees or other payments generated by each individual Participant's utilization of the Products & Services as set forth in **Appendix G** for a period of either i) one (1) year from the date of termination, or ii) throughout the term of each individual Participant's contract or Customer Agreement with Winning Supplier, whichever is longer, to the extent that Winning Supplier continues to generate revenue from each Participant's utilization of the Products & Services.

**Commented [DA25]:** This Section ensures that Collaborant and CCOG continue to participate in ongoing revenue streams generated through customer agreements or customer relationships that i) were established using this Agreement as a contract vehicle, and ii) extend beyond the Term of this Agreement. This clause enables customer agreements or customer relationships established subject to this Agreement to extend beyond the Term of this Agreement, rather than be coterminous with this Agreement.

3.1.1. **Audit of Winning Supplier.** CCOG and Collaborant shall have the right to perform audits, including inspection of books, records, and computer data relevant to Winning Supplier's provision of the Products & Services to Participants, to ensure that pricing, inventory, quality, process, and business controls are maintained; provided, however, that such inspections and audits will be conducted upon reasonable notice to Winning Supplier and so as not to unreasonably interfere with Winning Supplier's business or operations.

**Commented [DA26]:** This Section included to protect CCOG, Collaborant, and Participants.

3.1.2. **Force Majeure.** This Agreement will be temporarily suspended during any period to the extent that any Party during that period is unable to carry out its obligations under this Agreement or the Appendices by reason of an Act of God or the public enemy, act of terrorism, fire, flood, labor disorder not caused by Winning Supplier, civil commotion, closing of the public highways not caused by Winning Supplier, government interference, government regulations, or any other event or occurrence beyond the reasonable control of the affected Party ("**Event of Force Majeure**"). No Party will have any liability to the other Party(ies) for a delay in performance nor failure to perform to the extent this Agreement or any Appendix is so temporarily suspended; provided that nothing contained herein shall apply to payment obligations with respect to obligations which have already been performed under this Agreement. If the provision of Products & Services is impeded due to an Event of Force Majeure, then Winning Supplier may apportion the provision of Products & Services among its present and future customers on a fair and reasonable basis after consulting with Collaborant and the Participants potentially affected and in a manner that would not reasonably be expected to disproportionately affect the Participants.

**Commented [DA27]:** This Section included to protect the Parties and Participants.

3.1.3. **Notices.** All notices, claims, certificates, requests, demands, and other communications required or permitted hereunder ("**Notice**") must be in writing and will be deemed given to the addresses set forth in **Appendix A** (a) when delivered personally to the recipient, (b) upon delivery by reputable overnight courier service (charges prepaid), or (c) upon delivery or refusal of delivery by certified or registered mail, return receipt requested, and addressed to the intended recipient. A Party may change its address by giving written Notice to the other Parties in the specified manner as set forth in and for the purposes of this **Section 3.13**. The Parties agree that the day-to-day business communications, including pricing updates or revisions to any Appendix, may be made via electronic communication.

**Commented [DA28]:** This Section allows the Parties to provide Notice under traditional means. However, electronic communication is explicitly allowed for day-to-day business communications.

3.1.4. **Waiver.** Other than the rights and obligations with respect to payment provided by this Agreement, waiver by any Party(ies) of or the failure of any Party(ies) hereto to enforce at any time its rights with regard to any breach or failure to comply with any provision of this Agreement by the other Party(ies) may not be construed as, or constitute, a continuing waiver of such provision, or a waiver of any other future breach of or failure to comply with the same provision or any other provision of this Agreement.

**Commented [DA29]:** This Section included to protect all Parties and is mutual.

3.1.5. **Governing Law: Invalidity.** This Agreement will be construed and enforced in accordance with, and governed by, the laws of the State of Ohio without regard to rules of conflict of laws. If any provision of this Agreement is held invalid, then the remainder of this Agreement will continue in force as if the invalidated provision did not exist. Any suits filed by any Party pursuant to this Agreement shall be brought in a court of competent jurisdiction located in Cuyahoga County, Ohio.

**Commented [DA30]:** Choice of law for this Agreement must be the State of Ohio because CCOG (as the Public Sector Contract Holder) is a political subdivision in Ohio subject to Ohio law.

3.1.6. **Modification.** No release, discharge, abandonment, waiver, alteration, or modification of any of the provisions of this Agreement, or any of the Appendices incorporated herein, will be binding upon any Party unless set forth in a writing signed by authorized representatives of the Parties.

**Commented [DA31]:** This Section included to protect all Parties and is mutual.

3.17. **Assignment.** This Agreement and the rights and obligations hereunder may not be assignable by any Party hereto without the prior written consent of the other Parties. Any instrument purporting to make an assignment in violation of this **Section 3.17** shall be null and void. This Agreement may be extended to additional entities affiliated with the Parties upon the mutual agreement of the Parties. No such extension will relieve the extending Party of its rights and obligations under this Agreement.

**Commented [DA32]:** This Section included to protect all Parties and is mutual.

3.18. **No Third Party Beneficiaries; Survival of Representations.** This Agreement is made solely for the benefit of the Parties to it, and no other persons will acquire or have any right under or by virtue of this Agreement. Except as otherwise provided herein, all representations, warranties, covenants, and agreements of the Parties will remain in full force and effect regardless of any termination of this Agreement, in whole or in part.

**Commented [DA33]:** This Section included to protect all Parties and is mutual.

3.19. **Entire Agreement.** This Agreement, together with all attachments, appendices, and exhibits hereto, constitutes the entire agreement between the Parties with respect to the subject matter hereof and supersedes all prior oral or written representations and agreements regarding the same subject matter. The Parties acknowledge that this Agreement has been negotiated and incorporates their collective agreement as to the provisions to be contained herein. Therefore, no presumption will arise giving benefit of interpretation by virtue of authorship of any provision of this Agreement, and any ambiguity may not be construed for or against any Party.

**Commented [DA34]:** This Section included to protect all Parties and is mutual.

3.20. **Execution in Counterparts.** This Agreement may be executed in one or more counterparts, each of which will be deemed an original, but all of which will be considered one and the same agreement, and will become a binding agreement when one or more counterparts have been signed by each Party and delivered to the other Parties. For purposes of this Agreement, a facsimile or electronic signature will be deemed an original signature.

**Commented [DA35]:** This Section included to facilitate the execution of this Agreement.

3.21. **Titles, Headings & Recitals.** The Preamble to this Agreement is hereby incorporated herein and made part of this Agreement. The Recitals stated within this Agreement are deemed to be a part of the Agreement. The titles and headings of the sections and paragraphs of this Agreement are inserted for convenience only and shall not constitute a part hereof or affect in any way the meaning or interpretation of this Agreement.

3.22. **Severability.** If any part, term, or provision of this Agreement is declared unlawful or unenforceable by judicial determination or performance, the remainder of this Agreement will remain in full force and effect.

**Commented [DA36]:** This Section included to protect all Parties and is mutual.

3.23. **Mediation; Arbitration.**

**Commented [DA37]:** This Section included to provide a clearly defined dispute resolution process that protects the Parties from potential costs of litigation.

(a) **Mediation.** Any claim or controversy related to or arising out of this Agreement, whether in contract or tort ("**Dispute**"), will be resolved on a confidential basis according to the following process, which any Party may initiate by delivering to the other Party(ies) a written Notice describing the Dispute and the amount involved ("**Demand**"). After issuance of a Demand, the Parties shall continue to perform all obligations as required under this Agreement, notwithstanding the existence of the Dispute. Authorized representatives of the Parties shall meet, whether in person or electronically, within thirty (30) days after receipt of a Demand at a mutually agreed upon time to try to resolve the Dispute by negotiation.

(b) **Unsuccessful Mediation.** If the Dispute remains unresolved forty-five (45) days after the receipt of the Demand, any Party(ies) may start binding arbitration under the Commercial Arbitration Rules of the American Arbitration Association ("**AAA**"). The arbitration will be before one (1) arbitrator; however, before the selection of the arbitrator, a Party (whose identity will not be revealed to the arbitrators) may require, at its sole additional expense, a three (3) arbitrator panel, of which at least one arbitrator will be an attorney. No statements by, or communications between, the Parties during negotiation or mediation, or both, will be admissible for any purpose in arbitration. The arbitrator(s) will have no authority to award punitive damages or any other monetary relief not measured by the prevailing Party's(ies) actual damages (adjustments for time value of money permitted), and will not make any decision inconsistent with the terms and conditions of this Agreement. Each Party will bear its internal expenses and attorneys' fees and expenses.



(c) **Privileged.** The settlement mediation and any arbitration will be compromise negotiations and all offers, promises, conduct, and statements, whether oral or written, made in the course of the mediation or arbitration by any of the Parties, their agents, employees, experts, and attorneys or by the mediator or arbitrator, will be confidential, privileged, and inadmissible for any purpose, including impeachment under Rule 408 of the Federal Rules of Evidence and any applicable federal or state statute, rule, or common law provisions, and in any judicial or arbitration proceeding.

(d) **Joinder.** Any Party(ies) may join any other Party(ies) in the Arbitration Proceeding that any Party(ies) deems necessary to reach a complete adjudication of any Dispute arising under the terms of this Agreement and related to the Products & Services furnished to any Participants pursuant to this Agreement.

(e) **Other Suits.** Nothing in this **Section 3.23** will preclude any Party's recourse to a court of competent jurisdiction as defined in **Section 3.15** to: (a) enforce the terms of, or an arbitration under, this **Section 3.23**; (b) seek temporary equitable relief or specific performance necessary to protect its interests; or (c) recover specific property, including an action in replevin.

3.24. **Nondiscrimination & Intimidation**

(a) Winning Supplier expressly agrees that in the hiring of employees for the performance of work or services under this Agreement or any subcontract, Winning Supplier, its subcontractors, or any person acting on a Winning Supplier's or its subcontractor's behalf shall not discriminate in the hiring of employees by reason of race, creed, sex, disability as defined in Section 4112.01 of the Ohio Revised Code nor shall it discriminate against any citizen of the State of Ohio in the employment of labor or workers who are qualified and available to perform the Work to which the employment relates.

(b) Winning Supplier expressly agrees that Winning Supplier, any of its subcontractors, or any person on behalf of Winning Supplier or its subcontractors in any manner shall not discriminate against or intimidate any employee hired for the performance of work or services under this Agreement on account of race, creed, sex, disability as defined in Section 4112.01 of the Ohio Revised Code, or color.

(c) Winning Supplier expressly agrees to include the provisions of this **Section 3.24** in each of its written Subcontractor agreements for the Products & Services subject to this Agreement.

**Commented [DA38]:** This Section includes "flow down" requirements applicable to any agreement between CCOG and a third-party vendor under Ohio Revised Code.

***[SIGNATURE PAGE TO FOLLOW]***

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed by their duly authorized representatives as of the Effective Date.

**THE COOPERATIVE COUNCIL OF GOVERNMENTS, INC.**

By: \_\_\_\_\_

Name: Scott A. Morgan

As: CCOG Board President

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

**WINNING SUPPLIER**

By: \_\_\_\_\_

Name: \_\_\_\_\_

As: \_\_\_\_\_

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

**COLLABORENT GROUP, LTD.**

By: \_\_\_\_\_

Name: David J. Akers

As: President & CEO

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

## APPENDIX A: TERM OF AGREEMENT; NOTICES

### 1. The Term.

This Agreement and the Appendices attached hereto will become effective as of the Effective Date. This Agreement will remain in effect for approximately five (5) years and expire on **Month day, year** (the "Termination Date") unless extended or unless otherwise terminated or cancelled as set forth in the Agreement (the "Initial Term"). This Agreement may be renewed at any time by the mutual written consent of the Parties (each a "Renewal Term") unless this Agreement is terminated as set forth herein. The Initial Term together with all Renewal Terms exercised are hereinafter collectively referred to as the "Term."

**Commented [DA39]:** The definition of the Term and the renewal language allows Winning Supplier, CCOG, and Collaborent tremendous flexibility to maintain a contractual relationship in the public sector space that is working effectively for all Parties, including Participants.

### 2. Addresses for Notices.

#### a. If to CCOG:

The Cooperative Council of Governments, Inc.  
Attn: Board President  
6001 Cochran Road, Suite 333  
Cleveland, Ohio 44139  
Facsimile: 440.337.0002  
E-mail: [Info@SourcingAlliance.org](mailto:Info@SourcingAlliance.org)

#### b. If to Winning Supplier:

**Name**  
**Title**  
**Street Address 1**  
**Street Address 2**  
**City, State, Zip**  
**Facsimile:**  
**Email:**

#### c. If to COLLABORENT:

Collaborent Group, Ltd.  
Attn: President & CEO  
6001 Cochran Road, Suite 333  
Cleveland, Ohio 44139  
Facsimile: 440.337.0002  
Email: [David.Akers@SourcingAlliance.org](mailto:David.Akers@SourcingAlliance.org)

## APPENDIX B: PRODUCTS & SERVICES; PRICING

The following terms and conditions will apply to any purchase or utilization of the Products & Services from Winning Supplier. This **Appendix B** may be modified and at any time with the mutual written consent of Winning Supplier and Collaborator.

### 1. **Products & Services**

Insert description of Products & Services. Clearly define and separate multiple categories or Product & Services offerings if applicable.

The definition of Products & Services may be amended from time to time upon the mutual written agreement of Winning Supplier and Collaborator.

### 2. **Pricing for Products & Services**

[Alternative 1: include a written description of the pricing methodology, if applicable. For example, X% off wholesale price, or cost plus X%. This alternative applies when there is a clearly defined pricing model across the entire suite of offerings or within specific categories of offerings.]

[Alternative 2: incorporate by reference a separate pricing file. This alternative applies when Winning Supplier's pricing methodology is applied on a product by product or service by service basis, particularly across a large catalog of individual items or SKU's. Sample language: The pricing methodology for Products & Services is detailed in the following document, as may be updated from time to time upon the mutual written consent of Winning Supplier and Collaborator: *Agreement – Winning Supplier and Sourcing Alliance (Appendix B - Pricing) – Year.Month.Day.xlsx*; this pricing may be customized for each Participant based on that Participant's unique needs and requirements for Products & Services. This spreadsheet is hereby incorporated within and made a part of this Agreement.]

**Commented [DA40]:** This Section is included for Winning Supplier to insert a description of the Products & Services subject to this Agreement. Typically, Sourcing Alliance works with suppliers to ensure that their entire catalog of products and/or portfolio of services are incorporated in this Agreement to enable Winning Supplier sales representatives to cross-sell Winning Supplier's full suite of offerings to current and future Public Sector customers.

**Commented [DA41]:** CCOG and Collaborator recognize that the suite of offerings made available by Winning Supplier will evolve over time. This language ensures that the definition of Products & Services can be appropriately updated to reflect Winning Supplier's then current suite of offerings available to Participants.

**Commented [DA42]:** The language in this Section is tailored to the specific Winning Supplier and the suite of offerings subject to this Agreement. Pricing is either embedded in this Appendix or attached and incorporated by reference.

A key element of most Sourcing Alliance contracts is that Winning Suppliers have some degree of pricing flexibility to ensure that individual Participants can receive the best value while recognizing that the specific needs and requirements for each individual Participant will likely vary and a one-size-fits all pricing methodology is not optimal.

## APPENDIX C: WINNING SUPPLIER REPORTING REQUIREMENTS

The following terms and conditions will apply to the reporting of Participants' purchases of Winning Supplier's Products & Services. This [Appendix C](#) may be modified and at any time with the mutual written consent of Winning Supplier and Collaborent.

### 1. Monthly Spend/Administrative Fee Reporting & Report Structure.

On or before the 15<sup>th</sup> of each month, Winning Supplier shall provide reporting (the "Monthly Spend Report") regarding Participants' purchases of Winning Supplier's Products & Services in accordance with the template detailed in the Excel file *Operations - Sourcing Alliance Administrative Fee Reporting Structure.xlsx*, which is hereby incorporated by reference.

- 1.1. Participant Information (Columns A – F). These columns provide information necessary to identify each Participant purchasing Products & Services. In Column B, the Participant's affiliation is identified; Participants will either be tied directly to Sourcing Alliance as Sourcing Alliance members, or to an Association Partner if the Participant is a member of an Association Partner. In Column H, Winning Supplier includes the customer or account number assigned by Winning Supplier to each Participant.
- 1.2. Participant Spend by Month (Columns I – T). These columns identify each Participant's purchases of Products & Services ("Spend") on a monthly basis throughout the calendar year. The report for January will only include January Spend, the report for February will include both January and February Spend, and so on.
- 1.3. Administrative Fee Percentage (Column U). The Administrative Fee percentage defined in Appendix G, Section 1 is included in Column U.
- 1.4. Sourcing Alliance Administrative Fees (Columns V – AH). The actual Administrative Fee calculation based on the Spend by Participant by month is listed in Columns V – AG, with the year-to-date total in Column AH.

**Commented [DA43]:** Reporting of Spend by Participant and the associated Administrative Fees is critical as CCOG is a public sector entity and is subject to annual audits by the Auditor of State. Additionally, for purposes of marketing and sales strategy and execution, as well as revenue sharing with Association Partners, Collaborent imports Spend and Administrative Fee information on a per Participant, per month basis into its Customer Relationship Management system. The reporting structure outlined in this Section 1 has been developed to meet CCOG and Collaborent's audit, internal operational, and revenue sharing requirements.

### 2. CCOG and Collaborent Audit of Winning Supplier Reporting.

CCOG and Collaborent, at their own expense, shall have the right to perform audits of Winning Supplier's Monthly Spend Reports and Administrative Fee payments following the delivery of each report as described in this [Appendix C, Section 1](#), including inspection of books, records, and computer data relevant to Winning Supplier's provision of the Products & Services to Participants under this Agreement to ensure that the provisions of this Agreement are met; provided, however, that such audits will be conducted upon reasonable notice to Winning Supplier and as not to unreasonably interfere with Winning Supplier's business or operations.

**Commented [DA44]:** This Section included to protect CCOG and Collaborent.

### 3. Monthly Prospective Participant Reporting.

On or before the fifteenth of each month, Winning Supplier shall provide Collaborent with a sales pipeline report (the "Pipeline Report") that includes the current status of Winning Supplier's sales efforts with each Prospective Participant subject to this Agreement. Winning Supplier and Collaborent utilize best efforts to jointly develop a mutually agreeable reporting structure within sixty (60) days following the Effective Date of this Agreement. The Pipeline Report will include information for each Prospective Participant such as, but not limited to, the contact name, the sales stage, the probability of close, the estimated close date, the estimated annual Spend, the name of the Winning Supplier sales representative assigned to the Prospective Participant, and the last and next step in the process.

**Commented [DA45]:** This Section included to ensure ongoing open communication between Winning Supplier and Collaborent is it relates to the status of sales efforts with each Prospective Participant.

## APPENDIX D: TRADEMARKS & LOGOS

This Appendix D lists the trademarks and logos subject to this Agreement per the terms of Section 2.6. This Appendix D may be modified and at any time with the mutual written consent of Winning Supplier and Collaborent.

### 1. Winning Supplier's Trademarks & Logos.

**Word Marks:**

- **Insert Winning Supplier's word marks**

**Stylized Marks & Logos:**

Insert stylized Winning Supplier marks and logos
Insert stylized Winning Supplier marks and logos
Insert stylized Winning Supplier marks and logos
Insert stylized Winning Supplier marks and logos
Insert stylized Winning Supplier marks and logos
Insert stylized Winning Supplier marks and logos

**Commented [DA46]:** Insert any .gif, .jpg, or other files with logos and marks. One per row.

### 2. CCOG's Trademarks & Logos.

**Word marks:**

- The Cooperative Council of Governments, Inc.
- CCOG

**Stylized Marks and Logos:**

Not applicable.

### 3. CCOG's Trademarks & Logos.

**Word marks:**

- Collaborent Group, Ltd.
- Collaborent
- Sourcing Alliance

**Stylized Marks and Logos:**



## APPENDIX E: WINNING SUPPLIER CUSTOMER AGREEMENTS

The following documents are hereby incorporated by reference in this Agreement pursuant to Section 2.3 of this Agreement:

- Insert name of Winning Supplier standard customer agreement as amended for Participants
- Insert name of Winning Supplier standard customer agreement as amended for Participants
- Insert name of Winning Supplier standard customer agreement as amended for Participants
- Insert name of Winning Supplier standard customer agreement as amended for Participants
- Insert name of Winning Supplier standard customer agreement as amended for Participants

**Commented [DA47]:** This Section included to clearly identify the standard Winning Supplier customer agreements (if applicable), as amended by Winning Supplier and Collaborator, that Winning Supplier will utilize with Participants and Prospective Participants subject to this Agreement. These amended customer agreements will be utilized by Winning Supplier sales representatives with all Participants and Prospective Participants subject to this Agreement.



## APPENDIX F: ROLES & RESPONSIBILITIES

This Appendix F defines the roles and responsibilities of Collaborant and Winning Supplier under this Agreement. This Appendix F may be modified and at any time with the mutual written consent of the Winning Supplier and Collaborant.

### 1. Collaborant Services.

- 1.1. Supplier Sales Representative Training & Support. Collaborant will develop, subject to Winning Supplier approval, various sales training and marketing collateral. Collaborant will i) conduct periodic sales trainings with Winning Supplier sales representatives assigned to sell Products & Services, ii) provide sales representatives with marketing collateral and sales tools to utilize with Prospective Participants, with particular focus on the procurement process that led to the establishment of this Agreement, the legal ability for Prospective Participants in any state to purchase Products & Services through this Agreement without having to conduct their own bid or RFP process, and the key differentiators in the design of this program with Winning Supplier, iii) attend at least one Winning Supplier company-wide sales and/or leadership meeting per year, and iv) engage with Prospective Participants during the sales process to address questions relating to the procurement process, legal authority to purchase through this Agreement, and program design.
- 1.2. Marketing. Collaborant will incorporate information about the Products & Services into Sourcing Alliance's website and general collateral materials. Collaborant and Winning Supplier will jointly develop and approve marketing materials to promote the Products & Services, such as website content, brochures and collateral, talking points, press releases, and correspondence. Collaborant will market the Products & Services to Members as part of Collaborant's ongoing marketing activities through Sourcing Alliance; these marketing efforts will consist of a combination of i) general marketing of all SA Products & Products & Services, including Winning Supplier's Products & Services, and ii) marketing of Winning Supplier's Products & Services specifically and/or as part of a package of selected SA Products & Services to targeted Members.
- 1.3. Web-based Document Repository. Collaborant will establish web-based document repositories for Winning Supplier's management and sales teams and upload legal, operating, sales, and marketing collateral to the appropriate repositories as agreed with Winning Supplier. Collaborant will provide access for Winning Supplier's management and sales teams to the repositories.
- 1.4. eMarketplaces. Collaborant may establish an eMarketplace for Sourcing Alliance and also provide private-label eMarketplaces to Association Partners to offer SA Products & Services to the Association Partners' members. Should Collaborant establish such an eMarketplace, Collaborant will include Winning Supplier's Products & Services in the Sourcing Alliance eMarketplace and the Association Partners' eMarketplaces (subject to the approval of each Association Partner) and incorporate Products & Services in ongoing eMarketplace marketing campaigns to Participants. Collaborant will facilitate a connection between Winning Supplier's online catalogue or hosted catalogue, and/or create and host a landing page in Sourcing Alliance's eMarketplace and the Association Partners' eMarketplaces for Participants to identify and purchase Winning Supplier's Products & Services on the eMarketplaces.
- 1.5. Outbound Call Center. Collaborant operates an outbound call center (the "SA Call Center") that is focused on increasing utilization of SA Products & Services by current and prospective Participants. The SA Call Center is a resource that can be leveraged, by the mutual agreement of Winning Supplier and Collaborant, to qualify prospects and grow Spend.

### 2. Winning Supplier Roles & Responsibilities.

- 2.1. **Contact Information.** Winning Supplier will provide Collaborent with the preferred email addresses, phone numbers (office & cell), and mailing addresses for Winning Supplier's sales representatives, and provide updated sales representatives' contact information to Collaborent on at least a quarterly basis.
- 2.2. **Training.** Winning Supplier's sales representatives will attend a minimum of two Collaborent training sessions per year.
- 2.3. **Schedule of Winning Supplier Meetings.** Winning Supplier will provide Collaborent with a schedule of Winning Supplier's sales and leadership meetings on at least an annual basis.
- 2.4. **Sales Leader Engagement.** Winning Supplier will assign a sales leader with authority to make and implement decisions related to the activities conducted by Winning Supplier pursuant to this **Appendix F**. The assigned sales leader and Collaborent's assigned primary point of contact for Winning Supplier will schedule and hold monthly conference calls to maintain consistent and open communication.
- 2.5. **Winning Supplier's Sales & Implementation Roles.** Winning Supplier will be responsible for i) training Collaborent team members on Winning Supplier and the Winning Supplier's Products & Services, ii) following up with Prospective Participants to initiate the sales process, iii) managing the implementation and utilization of Winning Supplier's Products & Services for each Participant, and iv) providing, at a minimum, monthly electronic updates by the fifteenth (15<sup>th</sup>) of each month to Collaborent regarding the sales cycle and implementation status of each qualified Prospective Participant for Winning Supplier's Products & Services.
- 2.6. **Marketing.** Winning Supplier will incorporate information about the Products & Services into Winning Supplier's website and general collateral materials. Collaborent and Winning Supplier will jointly develop and approve marketing materials to promote the Products & Services, such as website content, brochures and collateral, talking points, press releases, and correspondence.
- 2.7. **eMarketplace.** Should Collaborent establish an eMarketplace as described in **Section 1.4** of this **Appendix E**, Winning Supplier will provide Collaborent with a hosted catalogue or connection to Winning Supplier's online marketplace (punch-out, transparent punch-out) so that Collaborent can establish a landing page for the Products & Services on Sourcing Alliance's eMarketplace and private-label eMarketplaces that Collaborent establishes for Association Partners to offer Winning Supplier's Products & Services to the Association Partners' members.
- 2.8. **Training for SA Call Center.** Twice per year at a minimum, Winning Supplier shall provide general sales training on the Products & Services to the team members in the SA Call Center, including, but not limited to, sample emails and voice mail messages, talking points, qualifying questions, and suggested responses to common objections. Winning Supplier shall provide the team members in the SA Call Center with a single point of contact to answer questions about the sale of the Products & Services. Winning Supplier shall work with the team members in the SA Call Center to define a process for the team members in the SA Call Center to transition potential opportunities to Winning Supplier's sales representatives.
- 2.9. **Sourcing Alliance Membership Agreement.** Winning Supplier will require each Prospective Participant agree to and sign a Sourcing Alliance Membership Agreement (available online on Sourcing Alliance's website or via email in hardcopy form) if such Prospective Participant becomes a Winning Supplier customer pursuant to the terms of this Agreement.
3. **Campaigns.** On a case by case basis, the Parties will mutually agree to promote Winning Supplier's Products & Services to Prospective Participants. Each such jointly approved promotional effort, whether ongoing during the Term or within specified timeframes, will be considered a "Campaign."
- 3.1. **Campaign Plans.** Collaborent and Winning Supplier will be responsible for developing a campaign project plan (a "Campaign Plan") for each campaign that identifies: i) the types of Prospective Participants entities

that will be prospected through the Campaign; ii) the Collaborent Services that will be utilized during the Campaign; iii) the Campaign schedule or time line, and iv) the responsibilities of both Collaborent and Winning Supplier for that Campaign. Collaborent will document and submit each Campaign Plan to Winning Supplier for review and written approval (including via email) prior to implementing any Campaign.

- 3.2. **Marketing Materials.** Collaborent and Winning Supplier will jointly develop and approve any Campaign-specific marketing materials, such as website content, brochures and collateral, talking points, press releases, and correspondence that will be used to promote the Products & Services featured in each Campaign to Prospective Participants.
- 3.3. **Collaborent's Campaign Implementation Roles.** For each approved Campaign, Collaborent will be primarily responsible for i) producing and distributing any Campaign marketing materials per the Campaign Plan, ii) training Winning Supplier's sales teams to leverage this already-procured contract for Products & Services with Public Sector Entities and Prospective Participants, and iii) supporting Winning Supplier's sales team in the sales process, including responding to Prospective Participants' questions regarding the procurement process and the prospect's legal authority to purchase Products & Services from Winning Supplier through this Agreement.
- 3.4. **Winning Supplier's Campaign Implementation Roles.** For each approved Campaign, Winning Supplier will be primarily responsible for i) identifying and assigning Winning Supplier sales representatives to Prospective Participants, ii) scheduling training sessions for Collaborent to train assigned Winning Supplier sales representatives, and iii) engaging Collaborent when questions arise regarding procurement processes and Prospective Participants' legal authority to purchase Products & Services through Sourcing Alliance.
- 3.5. **Joint Sales Calls.** If agreed upon by Winning Supplier and Collaborent, each Party will allocate resource(s) to attend joint sales calls on an agreed upon basis to pursue Prospective Participants and joint sales opportunities.
- 3.6. **Reporting.** By the fifteenth (15<sup>th</sup>) of each month or as otherwise agreed in the Campaign Plan, Collaborent will provide Winning Supplier with a report summarizing Collaborent's activities pursuant to this Agreement for each Campaign that was active during the prior calendar month. By the fifteenth (15<sup>th</sup>) of each month or as otherwise agreed in the Campaign Plan, Winning Supplier will provide Collaborent with a report summarizing Winning Supplier's activities and the pipeline status for Prospective Participants and the sale of Winning Supplier's Products & Services. Within a reasonable period of time (not to exceed three (3) business days), Winning Supplier shall communicate to Collaborent the successful closing of any Prospective Participant sales opportunities for the purchase of Winning Supplier's Products & Services (including details such as the closing date, term of the customer agreement if applicable, and the estimated annual Spend).
- 3.7. **Cost Sharing.** Collaborent and Winning Supplier will share equally any out-of-pocket marketing costs incurred by Collaborent in implementing any Campaigns (the "Campaign Costs"). Collaborent will estimate the Campaign Costs for each such Campaign and provide such estimates to Winning Supplier for review and approval prior to incurring such Campaign Costs. On a monthly basis, Collaborent will invoice Winning Supplier for its portion of Campaign Costs actually incurred during the prior calendar month. Campaign Costs may include, but are not limited to, collateral design, production, postage, and Campaign-associated SA Call Center costs.

## APPENDIX G: FINANCIAL TERMS

### 1. Administrative Fee.

On or before the fifteenth (15<sup>th</sup>) of each month, Winning Supplier will remit to Collaborant an administrative fee payment (the "Administrative Fee") of **written number** percent (**number**%) of the total Winning Supplier revenue (the "Sourcing Alliance Spend" or "Spend") invoiced to Participants during the prior calendar month. "Spend" shall mean the cumulative purchases of Products & Services by Participants under this Agreement net of taxes, shipping costs, returns, and credits.

**Commented [DA48]:** We establish our Administrative Fee as 20% of Winning Supplier's blended gross margins on the Products & Services available to Participants under this Agreement. For example, if Winning Supplier's blended gross margins are 25%, then the Administrative Fee would be a flat fee of 5% of Winning Supplier revenue invoiced the prior month. If Winning Supplier's blended gross margins are 10%, then the Administrative Fee would be a flat fee of 2% of Winning Supplier revenue invoiced the prior month. We use a flat percentage so that our interests are aligned with that of the Winning Supplier. As your revenue grows so does our revenue (we increase our revenue together).

### 2. Rebates or Other Payments.

**Insert rebate or other payment language as agreed.**

### 3. Sales Representative Compensation Model.

Winning Supplier will eliminate any penalties, disincentives, or deductions for Winning Supplier sales representatives selling Products & Services to Participants and Prospective Participants as a result of the pricing structure established in this Agreement or the Administrative Fee payments paid to Collaborant for Spend subject to this Agreement. Winning Supplier shall absorb the Administrative Fees "below the line." Winning Supplier sales representatives will not "add in" additional margin to compensate for or offset the Administrative Fees when developing pricing proposals for Participants and Prospective Participants subject to this Agreement.

**Commented [DA49]:** It is critical for the success of the Winning Supplier/Sourcing Alliance relationship to ensure that sales representatives are not dis-incentivized to work with Sourcing Alliance in closing business under this Agreement.

## APPENDIX H: PRIMARY POINTS OF CONTACT

This **Appendix H** identifies Collaborator's and Winning Supplier's primary points of contact relating to the fulfillment of each Party's respective obligations under this Agreement. This **Appendix H** may be modified and at any time with the mutual written consent of the Winning Supplier and Collaborator.

### 1. Collaborator's Points of Contact.

Role	Lead Contact	Title	Email	Direct Dial/Cell
Relationship Manager	Keith McDevitt	VP of Business Development	<a href="mailto:Keith.McDevitt@SourcingAlliance.org">Keith.McDevitt@SourcingAlliance.org</a>	216.233.2433
Sales	Keith McDevitt	VP of Business Development	<a href="mailto:Keith.McDevitt@SourcingAlliance.org">Keith.McDevitt@SourcingAlliance.org</a>	216.233.2433
Marketing	Ann Csongei	Marketing	<a href="mailto:Ann.Csongei@SourcingAlliance.org">Ann.Csongei@SourcingAlliance.org</a>	216.478.1045
Support Center	John Janota	Support Center Manager	<a href="mailto:John.Janota@SourcingAlliance.org">John.Janota@SourcingAlliance.org</a>	216.478.1046
Reporting & Administrative Fees	Regan Cellura	Manager of Operations	<a href="mailto:Regan.Cellura@SourcingAlliance.org">Regan.Cellura@SourcingAlliance.org</a>	216.478.1060
Contract & Legal Issues	David J. Akers	President & CEO	<a href="mailto:David.Akers@SourcingAlliance.org">David.Akers@SourcingAlliance.org</a>	216.280.5801

### 2. Winning Supplier's Points of Contact.

Role	Lead Contact	Title	Email	Direct Dial/Cell
Relationship Manager				
Sales				
Marketing				
Reporting				
Administrative Fees & Other Payments				
Contract & Legal Issues				
Customer Service				
Delivery				
Account Maintenance				
eCommerce				

## APPENDIX I: PROSPECTIVE PARTICIPANTS

This Appendix I identifies Prospective Participants subject to the terms of this Agreement pursuant to Section 2.7 of the Agreement. This Appendix I may be modified and at any time with the mutual written consent of the Winning Supplier and Collaborant. Prospective Participants are listed in the following document, which is hereby incorporated by reference in this Agreement:

- *Agreement Template - Supplier and Sourcing Alliance (Group Purchasing) - (Appendix I - Prospective Participants).xlsx*

# Youngstown

STATE UNIVERSITY

## MASTER AGREEMENT FOR PURCHASE OF SERVICES AWARDED BY COMPETITIVE EVENT

This Agreement is made by and between Youngstown State University (hereinafter "YSU or "University"), a state university as defined in Ohio Revised Code Section 3345.011, with its main campus located in Youngstown, Ohio with its administration office at One University Plaza, Youngstown, Ohio, 44555, and \_\_\_\_\_ (hereinafter referred to as "supplier") and is effective on the date executed by the University.

**No services may be ordered or delivered unless and until supplier receives a fully executed copy of agreement and valid Purchase Order.**

In consideration for the mutual promises contained herein, the above-named parties agree as follows:

1. **AWARD.** The supplier has been awarded the right to supply services for \_\_\_\_\_ based upon their proposal submitted in response to **YSU Competitive Event RFP** \_\_\_\_\_.
2. **ORDERS.** Supplier shall deliver services as ordered on YSU Purchase Order.
3. **PAYMENT.** Payment will be made by YSU within thirty (30) days of receipt of invoice by YSU. If YSU terminates this Agreement, YSU will pay supplier for services delivered to the date of termination.
4. **RATES** \_\_\_\_\_.
5. **INCORPORATION BY REFERENCE.** The following are incorporated into this agreement if applicable, by reference:
  - The Competitive Event document **RFP** \_\_\_\_\_;
  - Any and all addenda issued pursuant to the Competitive Event;
  - Suppliers' proposal;
  - Any and all changes agreed to by the parties resulting from post-proposal negotiations;
  - [YSU Purchase Order Terms and Conditions](#)
  - If any of the terms of this agreement conflict with the terms of any of the documents and/or agreements stated above, then the document or clause that is most beneficial to or protective of YSU shall control.
6. **TERM OF AGREEMENT. (THIS MUST BE COMPLETED)** All orders for services pursuant to this Agreement shall be commenced no earlier than the date of execution by YSU. Orders must be placed prior to the expiration date \_\_\_\_\_. This agreement may be extended at the option of both parties for \_\_\_\_\_.

7. **SUBJECT TO APPROPRIATION.** It is understood that any and all expenditures of University funds are contingent on the availability of lawful appropriations by the Ohio General Assembly. If the University determines at any time that the General Assembly failed to continue funding for payments and/or other obligations that may be due hereunder, then the University's obligations under the Agreement are terminated as of the date that the funding expired without further obligation of the University.
8. **TERMS AND CONDITIONS RELATING TO FEDERALLY FUNDED AGREEMENTS:** It is understood that by signing this agreement, the supplier agrees to comply with the following: the Equal Opportunity Act, Copland "Anti-Kickback" Act, Davis-Bacon Act, contract Work Hours and Safety Standards Act, Clean Air Act, Federal Water Pollution Act, Byrd anti-Lobbying Amendment, and Debarment and Suspension (E.O.s 12459 and 12689). If supplier is found to be in violation of any of these acts, this agreement is void *ab initio* and supplier must immediately repay to the University any funds paid under this agreement.
9. **MODIFICATIONS OF AGREEMENT.** This Agreement may be modified only by mutual consent of the parties and only in writing.
10. **INDEMNIFICATION.** Supplier agrees to indemnify and hold harmless YSU from and against any and all loss, claims, damages, expenses, or liabilities which YSU may incur based upon supplier's performance of this agreement or supplier's breach of any of the terms of this Agreement.
11. **ENTIRE AGREEMENT.** This Agreement shall constitute the entire agreement between the parties. This Agreement supersedes any and all agreements, either oral or in writing, between the parties hereto with respect to the subject matter hereof.
12. **ANTI-BOYCOTTING RESTRICTION.** Pursuant to O.R.C. Section 9.76(B), Company warrants that Company is not boycotting any jurisdiction with whom the State of Ohio can enjoy open trade, including Israel, and will not do so during the contract period.

**IN WITNESS WHEREOF**, the parties hereto have executed this Agreement as of the day and year first written above.

**YSU Signature/Agreement**

**Supplier Signature/Agreement**

Signature \_\_\_\_\_

Signature \_\_\_\_\_

Printed Name \_\_\_\_\_

Printed Name \_\_\_\_\_

Title \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

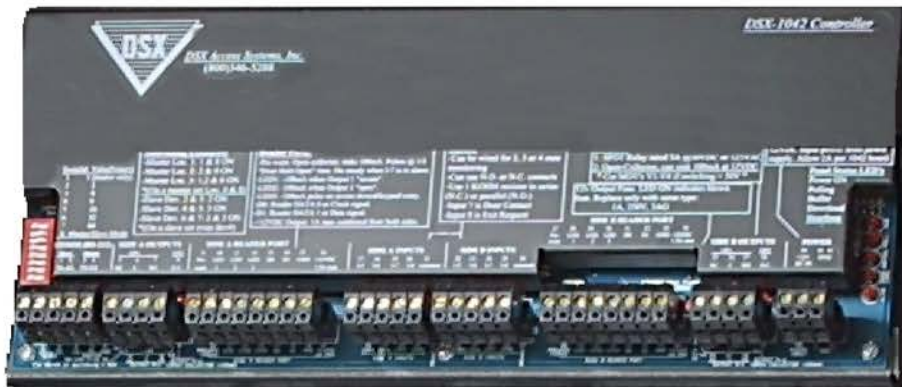
Date \_\_\_\_\_





DSX Access Systems, Inc.

## DSX-1042 Intelligent Controller



- Scalable Architecture 2 - 8 doors
- TCP/IP Communications
- Individual Intelligence
- 512K RAM / 512K Flash ROM
- UL 294 / UL 1076
- 260+ Card and Keypad Formats
- FIPS/TWIC Card Compatibility
- Real Time Processing and Communications
- Integrated Power Supply and Distribution

## DSX-1042 Specifications

### **Processor**

AM186 20Mhz

### **RAM/ROM Memory**

Flash ROM 512K

Standard RAM 512K

### **Communication Ports**

DSX-1042

RS-232 In 1 Master to PC

RS-232 Out 1 Panel to DSX-1040CDM

### **Power Requirements**

DSX-1042 13.5 VDC @ 300ma from 1040CDM

### **Output Voltage**

Panel outputs provide a regulated, fused, DC voltage.

DSX-1042 9-13.5VDC - 12VDC nominal - 1A Fused

All Outputs are Class 2, Power Limited

### **Inputs**

EOL Supervised 8

**4 Inputs** are used for standard point monitoring.

**4 Inputs** are used for door position and exit request monitoring.

All Inputs support two, three, and four state monitoring with five programmable circuit types.

### **Outputs**

Form C Relays 2

Relay Output Ratings 5 AMP - 30VDC

Open Collector Outputs 2 - negative 100ma

LED Outputs 6 - 3 per reader port - negative 100ma

Pre-Alarm Outputs 2 - 1 per door - negative 100ma

### **Access Controlled Entry Points**

Card Reader or Keypad 2 expandable to 8

Card and Reader Formats 240+ including PIV Cards

Any combination of card readers, keypads, or card and keypad controlled entry points may be used.

### **Size**

DSX-1042 11" W x 4.5" H x 1.5" D

### **Weight**

DSX-1042 1.2 lb.

### **Finish**

Black Enamel with White Silkscreen.

### **Temperature**

Operating 32 to 131 F

Storage -35 to 150 F

### **Humidity**

Operating 0 to 95%, relative

### **Warranty**

Limited 2 Years



DSX Access Systems, Inc.

## DSX-1042 Intelligent Controller



- Scalable Architecture 2 - 8 doors
- TCP/IP Communications
- Individual Intelligence
- 512K RAM / 512K Flash ROM
- UL 294 / UL 1076
- 260+ Card and Keypad Formats
- FIPS/TWIC Card Compatibility
- Real Time Processing and Communications
- Integrated Power Supply and Distribution

## DSX-1042 Specifications

### **Processor**

AM186 20Mhz

### **RAM/ROM Memory**

Flash ROM 512K

Standard RAM 512K

### **Communication Ports**

DSX-1042

RS-232 In 1 Master to PC

RS-232 Out 1 Panel to DSX-1040CDM  
1040CDM

RS-232 In 1 Master to DSX-1040CDM

RS-232 Out 1 Slave Communications

RS-485 In 1 From previous DSX-1048 Package

RS-485 Out 1 To subsequent DSX-1048 Packages

### **Power Requirements**

DSX-1042 13.5 VDC @ 300ma from 1040CDM

DSX-1040CDM 13.5 VDC @ 150ma from 1040PDP

Total Maximum Current 13.5 VDC @ 7.0A

### **Output Voltage**

Panel outputs provide a regulated, fused, DC voltage.

DSX-1042 9-13.5VDC - 12VDC nominal - 1A Fused

DSX-1040CDM 9-13.5VDC - 12VDC nominal - 1.5A

Fused

DSX-1040CDM 5VDC - .5A Fused

All Outputs are Class 2, Power Limited

### **Inputs**

EOL Supervised 8

**4 Inputs** are used for standard point monitoring.

**4 Inputs** are used for door position and exit request monitoring.

All Inputs support two, three, and four state monitoring with five programmable circuit types.

### **Outputs**

Form C Relays 2

Relay Output Ratings 5 AMP - 30VDC

Open Collector Outputs 2 - negative 100ma

LED Outputs 6 - 3 per reader port - negative 100ma

Pre-Alarm Outputs 2 - 1 per door - negative 100ma

### **Access Controlled Entry Points**

Card Reader or Keypad 2 expandable to 8

Card and Reader Formats 260+ including PIV Cards

Any combination of card readers, keypads, or card and keypad controlled entry points may be used.

### **Equipment Size**

DSX-1040CDM 11" W x 4.5" H x 1.5" D

DSX-1042 11" W x 4.5" H x 1.5" D

### **Equipment Weight**

DSX-1040CDM 1.0 lb.

DSX-1042 1.2 lb.

### **Enclosure Type**

Nema Type 1 equivalent enclosure with lift-off hinged door, lock/key, and tamper switch.

### **Enclosure Size**

DSX-1040E Cabinet 15.5" W x 22.5" H x 6" D

### **Enclosure Weight**

DSX-1040E Cabinet 19.2 lb.

### **Finish**

Black Powder Coat with White Silkscreen on Enclosure and Black Enamel on DSX-1042.

### **Conduit Knockouts**

Concentric knockouts in Top, Bottom, and Sides.

Knockouts accommodate 1/2, 3/4, 1, 1 3/4 inch conduit.

### **Temperature**

Operating 32 to 131 F

Storage -35 to 150 F

### **Humidity**

Operating 0 to 95%, relative

### **Warranty**

Limited 2 Years



## PC Hardware Requirements

DSX, DSX-SQL, PC Master, L85 and SIO are compatible with the latest and most recent Windows Platforms. PC Hardware and Operating Systems for these applications are outlined below. The hardware requirements are a minimum specification, which can always be exceeded if desired. All PCs used in the DSX system must meet these minimum requirements for the system to be supported by DSX.

**Note** /// System performance is dependent on the PC and LAN processing speed. If you have any questions regarding the DSX software and PC requirements, please call DSX Technical Support. This PDF, located on the DSX Website supersedes all other disseminations.

<b>CPUs Minimums</b>	<b>Application</b>
Pentium 2.8 GHz Dual Core (or better)	Host PC for single PC, single location system, or LAN workstation for single location system. 4G RAM
Pentium 2.8 GHz (or better)	LAN Comm Server or File Server for single location system, or workstation for multi-location system. 4G RAM
Pentium 2.8 GHz Dual Core (or better)	LAN Comm Server and/or combination File Server for multi-location system. 8G RAM - minimum
<b>Memory Minimums</b>	<b>Application</b>
4G	Basic System, Single PC
4-84G+	Multi-Location Comm Server and Badging
<b>Drive Minimums</b>	<b>Application</b>
USB Port for Flash Drive	Software Installation
1G Hard Drive Space minimum	DSX Install requires 100M SQL Databases require 300M These are minimum sizes
<b>Monitor</b>	<b>Application</b>
SVGA 800 x 600 or better	Badging, Maps
65,000 colors or better	
17" or larger recommended	

<b>LAN Communications</b>	
Adapter 100Mbit or better	100M or better recommended
Requires TCP/IP Protocol	Use MS Loopback Address if there is no LAN
Comm Server	Static IP Address -required
LAN Modules	Static IP Address -required
Comm Server to Controller	UDP - ports 4000 to 5000
Comm Server to Workstation	TCP - ports 22223 / 22224
<b>Sound</b>	<b>Application</b>
Windows™ compatible sound card.	DSX can play WAV files for input alarms.
<b>Backup Gear</b>	<b>Application</b>
Windows™ compatible Backup gear.	DSX can send backups to logical drive. DSX SQL uses SQL Server for backups.
<b>Modem</b>	
DSX External dial-up	DSX Modems are the only modems supported by DSX.
<b>Serial Ports</b>	
DSX-USB USB to RS-232 / RS-485.	Used for Direct and Dialup communications.
<b>Client Operating Systems</b>	<b>DSX Version</b>
Windows™ 10 Pro +64 bit	3.11.4 / 4.10.11 and higher
Windows™ 7 Pro + 64 bit	3.7.152 / 4.8.112 and higher
The Comm Server Program can run on a Client Operating System.	
<b>Server Operating Systems</b>	
Server 2008 R2	3.7.152 / 4.8.112 and higher
Server 2012 R2	3.9 / 4.9 and higher
Server 2016	5.0.12 / 6.0.12 and higher
Server Operating Systems require Active Directory.	
<b>SQL Server</b>	
SQL 2008 R2	4.7 and higher
SQL 2012 sp3	4.9 and higher
SQL 2014 sp2	4.10 and higher
SQL 2016 sp1	6.0.12 and higher
<b>Dependencies</b>	
Comm Server	.NET Framework 3.5/4.5 or >
Client Workstation	For DSX Key Monitor.exe For WebCam, Email/Text



DSX Access Systems, Inc.

## DSX-LAN Communications Module



- ❖ Web Interface
- ❖ Admin and User Passwords
- ❖ Complex Passwords
- ❖ Powered by Controller or CDM
- ❖ IP and Serial Setup Utilities
- ❖ Transmitted Security Log
- ❖ DHCP / Static Communications
- ❖ AutoSensing 10/100 Auto Duplexing
- ❖ RS-232/485 Panel Communications
- ❖ UDP Protocol with definable Socket

# **DSX-LAN Module Overview**

## **Master Communications**

The DSX-LAN module is used to provide Local or Wide Area Network Communications between the Comm Server PC and Master Controller. The WinDSX software is inherently TCP/IP capable and can direct communications to a particular IP address and UDP port number. The DSX-LAN module receives that communication and converts it to RS-232 or RS-485 that connects directly to the Master Controller.

## **Slave Communications**

The DSX-LAN can also be used at a Slave Controller or a Cluster of Slave Controllers with the use of the DSX PC Master Software. PC Master is an application that routes Panel Communication to various IP Addresses and/or Comm Ports. PC Master is positioned between the Comm Server PC and the field controllers.

## **Specifications**

### **Power**

The DSX-LAN is powered from a DSX Intelligent Controller 5V or 12V fused outputs. It can also be powered from the DSX-1040 CDM 5V or 12V outputs.

### **Mounting**

The DSX-LAN(M) is designed to fit in the same Equipment Cabinet as the DSX-1048 and DSX-1022 Controllers. It can mount on the inside or rest in the bottom of the enclosure. It has three mounting holes and removable terminal blocks.

### **Communications**

The DSX-LAN module is configurable for static or dynamic communications (1 or 2 Comm Servers) and is auto-sensing 10/100 and auto - duplexing. LAN communications is UDP only and only over the ports specified in the range of 4000 to 5000.

### **Size**

DSX-LAN(M) 2.7" W x 3.7" H x 1.5" D

### **Weight**

DSX-LAN 6.9 oz.

### **Temperature/Humidity**

Operating 0 to 70 C

### **Power Requirements**

DC Input Voltage 5-14VDC @ 350ma

### **Warranty**

Limited 2 Years





## Multi-technology readers



### Overview

Schlage® multi-technology readers are designed to simplify your access control solutions and allow a transition from existing population proximity or magnetic stripe to more secure encrypted card technology at your own pace—without having to change readers as new technologies are available. Five available models to fit any need and works with multiple form factors including wristbands, cards, fobs and tags.

- MT11: Mullion Mount
- MT15: Wall Mount (Single-gang)
- MTK15: Wall Mount w/keypad (Single gang)
- MTMS15: Magnetic Stripe Reader Wall Mount
- MTMSK15: Magnetic Stripe Reader Wall Mount with Keypad

### Features and benefits

Schlage multi-technology readers contain both 125 kHz proximity and 13.56 MHz contactless smart card capability in one-unit handling multiple formats simultaneously. Wiegand and RS-485 output available for simple interface with most access control panels.

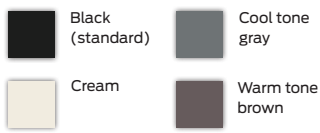
- Compatible with NFC-open smart phones using Schlage or aptiQ mobile credentials.
- Limited lifetime warranty
- Accommodates interior, exterior, metal and non-metal installation environments
- Quick-connect cable allows for easy installation
- Easy-to-install mounting bracket
- Available finishes include: Black (standard), cool-tone gray, cream and warm-tone brown





Model*	MT11		MT15		MTK15	MTMS15	MTMSK15
Reader type	Multi-technology – mullion		Multi-technology – single gang		Multi-technology with keypad – single gang	Multi-technology with magnetic stripe	Multi-technology with magnetic stripe and keypad
Frequency	13.56 MHz and 125 kHz				13.56 MHz and 125 kHz and magnetic stripe		
FIPS 201 compliant	Yes						
Standard default PIV output	75 bit PIV**						
Standards	SO 14443A, 14443B, 15693						
Certifications	FCC Certification • IC Certification • UL 294 Listed • RED Directive (15 EU Countries) • CE Mark • IP65						
Voltage range	5-16 VDC						
Power supply	Linear DC						
Current requirement (at 12 VDC and 25 C; mAmps)	MT11 Avg. 100 mA Peak 170 mA	MT11-485 Avg. 115 mA Peak 145 mA	MT15 & MT15-485 Avg. 120 mA Peak 200 mA	MTK15 and MTK15-485 Avg. 120 mA Peak 230 mA	MTMS15 and MTMS15-485 Avg. 120mA Peak 200mA	MTMSK15 and MTMSK15-485 Avg. 120mA Peak 230mA	
Read range	Proximity: Up to 5" (12.7 cm) MIFARE Classic: Up to 4" (10 cm) MIFARE Plus: Up to 1" (2.5 cm) MIFARE DESFire EV1: Up to 2" (5.1 cm) PIV credential: Up to 2.5" (6.5 cm)						
Cable specification	18 AWG, 5 conductor stranded/shielded						
System interfaces	Wiegand / Clock & Data / RS-485*** (OSDP)						
Cabling distance	Wiegand output: 500 ft (152 m)						
Physical dimensions (H x W x D)	5.91" x 1.72" x 0.81" 15 cm x 4.4 cm x 2.1 cm	5.1" x 3.25" x 0.76" 12.9 cm x 8.3 cm x 1.9 cm	5.1" x 3.25" x 0.76" 12.9 cm x 8.3 cm x 1.9 cm	5.1" x 3.25" x 0.76" 12.9 cm x 8.3 cm x 1.9 cm	4.43" x 5.17" x 1.15" 11.25 cm x 13.13 cm x 2.92 cm	4.43" x 5.17" x 1.15" 11.25 cm x 13.13 cm x 2.92 cm	
Operating temperatures	-40° to 158°F (-40° to 70°C)	-40° to 158°F (-40° to 70°C)	-40° to 158°F (-40° to 70°C)	-40° to 158°F (-40° to 70°C)	-31° to 151°F (-35° to 67°C)	-31° to 151°F (-35° to 67°C)	
Weight	5.7 oz	9.1 oz	9.3 oz	9.3 oz	8.9 oz	9.5 oz	
Material	PBT Polymer						
Technologies supported in default mode							
Schlage Proximity	■	■	■	■	■	■	
XceedID® Proximity	■	■	■	■	■	■	
HID® Proximity	■	■	■	■	■	■	
GE/CASI ProxLite®	■	■	■	■	■	■	
AWID® Proximity	■	■	■	■	■	■	
LenelProx®	■	■	■	■	■	■	
Schlage/aptiQ mobile	■	■	■	■	■	■	
Schlage/aptiQ/XceedID smart cards using MIFARE Classic	■	■	■	■	■	■	
Schlage smart cards using MIFARE Plus	■	■	■	■	■	■	
Schlage/aptiQ smart cards using MIFARE DESFire EV1	■	■	■	■	■	■	
DESFire® CSN	■	■	■	■	■	■	
HID iCLASS® CSN	■	■	■	■	■	■	
Inside Contactless PicoTag® CSN	■	■	■	■	■	■	
ST Microelectronics® CSN	■	■	■	■	■	■	
Texas Instruments Tag-It® CSN	■	■	■	■	■	■	
Phillips I-Code® CSN	■	■	■	■	■	■	

### Color options†



\* Some features and benefits listed on the front may not be applicable to the smart-only and proximity-only readers. Other output options available through configuration.  
 \*\* RS-485 model numbers include "-485" after the original model number. For example, MT11-485 is the RS-485 version of the multi-technology mini-mullion reader. Multi-drop, Open Standard Device Protocol (OSDP).  
 † Lead time may apply for non-standard colors

### About Allegion

Allegion (NYSE: ALLE) is a global pioneer in safety and security, with leading brands like CISA®, Interflex®, LCN®, Schlage®, SimonsVoss® and Von Duprin®. Focusing on security around the door and adjacent areas, Allegion produces a range of solutions for homes, businesses, schools and other institutions. Allegion is a \$2 billion company, with products sold in almost 130 countries. For more, visit [www.allegion.com](http://www.allegion.com).

