



## ATTACHMENT A: PROPOSAL REQUIREMENTS & SPECIFICATIONS

# DOCUMENT MANAGEMENT, MAIL, AND VOTE-BY-MAIL, EQUIPMENT WITH RELATED SERVICES

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## Section 1. General Guidelines

### 1.1. Instructions for Completing Attachment A

**Attachment A** is provided to Bidders in an editable Microsoft Word form so that it can easily serve as the base document for a Bidder’s Technical Proposal. Bidders should incorporate their Technical Proposal responses directly into this document and include referenced attachments separately.

Use the following electronic file naming convention for naming your Technical Proposal prior to uploading your completed Technical Proposal to Bonfire: **Technical Proposal – Bidder Name.docx**.

For sections of **Attachment A** structured like the example below, simply click in the green cell or paste (using the *Paste Special > Merge Formatting* function in Microsoft Word) your response.

1.1.1.	<b>Formation.</b> 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.
This is a sample question. Do not provide a 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.

1.1.2.	<b>Installers.</b> Is the installation service performed by a company-owned installation team or one of your dealers or resellers?	<input type="checkbox"/> Yes <input type="checkbox"/> No
This is a sample question. Do not provide a response.		

### 1.2. Attachments

Bidders may incorporate additional documents by reference as part of their response to the questions in this document. For example, you may want to include brochures, reports, charts, or graphs in response to specific questions. Bidders should clearly state in their response whether any specific documents are incorporated in their proposal by reference. In the event the attached documents are not referenced correctly, the PRT may exclude those attachments from consideration when scoring proposals.

The file names of such referenced documents that are included in a Bidder’s electronic Technical Proposal submissions and uploaded to Bonfire should include in the following order: i) Technical Proposal, ii) Bidder’s name, iii) the Section number of the question for which the file is included as part of the response, and iv) a brief description of what is included in the electronic file. For example, if a Bidder references an attachment that includes financial statements in response to **Section 2.2.1**, the following electronic file name would be appropriate: **Technical Proposal – Bidder Name – Section 3.2.1. – Financial Statements.pdf**.

## Section 2. Bidder Overview & Qualifications

### 2.1. Company Information

2.1.1.	<b>Company Name &amp; Address.</b>	
Company Name:	DMT Solutions Global Corporation d/b/a BlueCrest	
Headquarters Street Address:	37 Executive Dr.	
City, State & Zip Code:	Danbury CT 06810	
Main Telephone Number:	475-204-3068	
Website:	www.bluecrestinc.com	
2.1.2.	<b>Formation.</b> 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.	
2018. DMT Solutions Global Corporation was formerly the document messaging technology division of Pitney Bowes.		
2.1.3.	<b>Legal Structure.</b> Check the box next to the option that best describes the company's legal structure. Include requested narrative in the space provided.	
<input checked="" type="checkbox"/>	Corporation – provide the State of incorporation and the company ownership structure.	Click here to enter response.
<input type="checkbox"/>	Partnership – provide the State of registration and the names of all partners.	Click here to enter response.
<input type="checkbox"/>	Sole Proprietorship – provide the State of registration and the name and title of the principal.	Click here to enter response.
<input type="checkbox"/>	Joint Venture – provide the State of registration and the names and titles of all principals.	Click here to enter response.
<input type="checkbox"/>	Other – provide detailed description of corporate structure and ownership.	Click here to enter response.

### 2.2. Financial Strength & Legal Considerations

2.2.1.	<b>Financial Strength.</b> 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 outlined in the RFP.</i>	
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BlueCrest is privately held and does not release this information.	
2.2.2.	<b>Bankruptcy &amp; Insolvency.</b> 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.
N/A	
2.2.3.	<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.
N/A	
2.2.4.	<b>Mandatory Contract Performance Disclosure.</b> 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 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 a Bidder from consideration, at the sole discretion of Equalis Group, such claims and a review of the background details may result in a rejection of a Bidder’s proposal. Equalis Group will make this decision based on the Proposal Review Team’s determination of the seriousness of the claims, the potential impact that the behavior that led to the claims could have on the Bidder’s performance of the work, and the best interests of Members.
N/A	
2.2.5.	<b>Mandatory Disclosure of Governmental Investigations.</b> 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, Bidders 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 the Bidder by the governmental agency. While disclosure of any governmental action will not automatically disqualify a Bidder from consideration, such governmental action and a review of the background details may result in a rejection of the Bidder’s proposal at Group’s sole discretion. Equalis Group will make this decision based on the Proposal Review Team’s determination of the seriousness of the claims, the potential impact that the behavior that led to the claims could have on the Bidder’s performance of the work, and the best interests of Members.
N/A	

## 2.3. Industry Qualifications

2.3.1.	<b>Company Identification.</b> How is your organization best identified? Is it a manufacturer, distributor/dealer/reseller, or service provider?
Manufacturer.	
2.3.1.1.	<b>Authorization.</b> If your company is best described as a distributor/dealer/reseller (or similar entity), please provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned?
N/A	
2.3.1.2.	<b>Network Relationship.</b> If your company is best described as a manufacturer or service provider, please describe how your dealer, distributor, or reseller network operates to sell and deliver the Products & Services proposed in this RFP.
BlueCrest maintains its own sales and support and maintenance network.	
2.3.2.	<b>Industry Experience.</b> How long has your company provided products and services outlined in your response to this RFP? What percentage of your company's revenue in each of the last three (3) full calendar years was generated from these products and services?
Over 40 years. 100% of BlueCrest sales are in mail handling and related product(s).	
2.3.3.	<b>Geographic Reach.</b> Describe your company's service area in the United States and which areas you intend to offer services under a resulting contract if awarded. If your company does not currently provide services nationwide, describe your plans/timeframes to achieve nationwide service provision, if applicable.
BlueCrest is a global company. This contract is focused on the US.	
2.3.4.	<b>Certifications and Licenses.</b> Provide a detailed explanation outlining the licenses and certifications that are i) required to be held, and ii) actually held by your organization (including third parties and subcontractors that you use). Has your company maintained these certifications on an ongoing basis? If not, when and why did your company lose any referenced certifications?
BlueCrest has ISO9001 certification, for manufacturing process excellence.	

## 2.4. Public Sector Focus

2.4.1.	<b>Public Sector Contract Vehicles.</b> What Public Sector contract vehicles (e.g., state term contracts, public sector cooperatives, etc.) does your company have in place to provide products & services defined in this RFP? For
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	each contract vehicle, when was the contract established, what is the expiration date, and how much annual revenue does your company generate through the contract(s) in each of the last three (3) calendar years?
BlueCrest has a GSA contract. It was awarded in February 2021 and has a five year initial term and replaces a prior Pitney Bowes subcontract. BlueCrest is privately held and does not release sales information. BlueCrest also has a NASPO agreement with was recently extended through May 2022.	
2.4.2.	<b>Education Success.</b> What is the i) total dollar amount, and ii) percentage of your company’s total annual revenue generated by sales to educational institutions (i.e., K-12 schools & school districts and high education)?
BlueCrest does sell to higher education, but because BlueCrest is privately held, we do not release sales data.	
2.4.3.	<b>Government Success.</b> What is the i) total dollar amount, and ii) percentage of your company’s total annual revenue generated by sales to local governments (i.e., municipalities, counties, special districts, and state agencies)?
BlueCrest has significant government sales, but because BlueCrest is privately held, we do not release sales data.	
2.4.4.	<b>Public Sector Strategic Growth Plan.</b> Describe your company’s three to five-year public sector 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 total revenue generated by local governments and educational institutions in each of the last three (3) calendar years? What percentage of your company’s total annual revenue is generated by sales to local governments and educational institutions? <i>For clarity, the figures requested are to include revenue generated through cooperative contracts (see question 2.4.1) and all other forms of revenue to local governments and educational institutions to represent the aggregate revenue volume.</i>
BlueCrest Sales Executives cover specific geographic territories, named accounts or vertical industry/solution focus. Their areas of specialty focus on specific industries and solutions in which BlueCrest has invested to align tightly to the areas of Equalis’ target markets: Government and Vote By Mail.	
<ul style="list-style-type: none"> <li>• Government Sales representatives provide industry specific expertise Equalis Members</li> <li>• Because of the importance of government contract compliance, BlueCrest maintains a Government Contracts Center of Competence to ensure we have alignment for critical tasks including reporting, compliance, and adherence and maintenance of all contract vehicles. This team will also support the Equalis contract.</li> </ul>	
See Section 5 for more details on BlueCrest’s sales strategy	

## 2.5. Customer References

2.5.1.	<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. Each reference should include:</p> <ul style="list-style-type: none"> <li>• Customer name and location;</li> <li>• Customer contact person and their title, telephone number, and email address;</li> </ul>
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- A brief description of the products and services provided by your company;
- Customer relationship starting and ending dates; and,
- Notes or other pertinent information relating to the customer and/or the products and services your company provided.

1. **Miami Dade Elections Department**

2700 NS 87<sup>th</sup> Ave, Doral FL  
 Gilbert Yurubi, Deputy Supervisor of Elections (IT)  
 305-499-8366  
[gilbert.yurubi@miamidade.gov](mailto:gilbert.yurubi@miamidade.gov)

BlueCrest products and services provided:

(3) MSE 12 station inserters, (3) 72 pocket Vantage Sorters, Relia-Vote Software suite, and Output manager print enhancement software. The combined solutions create the outbound ballot packets for voters in Miami Dade County. The solution also sorts the outbound ballots for postal savings. The sorters are also used to validate return ballots with images, date time stamps and signatures on the inbound return ballots.  
 Customer relationship starting and ending dates; and, 12/07 – Current

2. **Palm Beach County Supervisor of Elections**

7835 CENTRAL INDUSTRIAL DR STE 201  
 Riviera Beach FL 33404  
 Sean Williams, Director of Vote by Mail  
 Palm Beach County Supervisor of elections  
 561-346-2870  
[sean@pbcelections.org](mailto:sean@pbcelections.org)

BlueCrest products and services provided: Two 9-station inserters, Two 72 pocket Vantage sorters and Relia-Vote Software suite. The combined solutions create the outbound ballot packets for voters in Miami Dade County. The solution also sorts the outbound ballots for postal savings. The sorters are also used to validate return ballots with images, date time stamps and signatures on the inbound return ballots.  
 Customer relationship starting and ending dates; and, 12/06- Current

3. **Brevard County Supervisor of Elections**

115 S. Andrews Ave, Ft. Lauderdale, FL 33301  
 Mary Hall, Deputy Supervisor of Elections  
 954-712-1962  
[mhall@browardsoe.org](mailto:mhall@browardsoe.org)

BlueCrest products and services provided: One 9-station MSE Inserters, One 24-bin Vantage Sorters, and Relia-Vote Software suite. The combined solutions create the outbound ballot packets for voters in Broward County. The solution also sorts the outbound ballots for postal savings. The sorters are also used to validate return ballots with images, date time stamps and signatures on the inbound return ballots.  
 Customer relationship starting and ending dates; and, 6/08- Current

4. **Commonwealth of Massachusetts**

Executive Office of Technology Services & Security  
 Ronald Thompson, Jr.  
 Sr. Director of Datacenter Services  
 200 Arlington St, Suite 2100, Chelsea, MA 02150  
 Office: (617) 660-4533

5. **Orange County Registrar of Voters**  
 1300 S Grand Ave, Santa Ana, CA 92705  
 Neal Kelly, Registrar of Voters  
 (714) 567-5139  
[Neal.Kelley@rov.ocgov.com](mailto:Neal.Kelley@rov.ocgov.com)  
 BlueCrest products and services provided:  
 Products and services provided by your company; One IntelliJetPrinter, One MPS Inserter, Two 72-bin Sorters, Software, ReliaVote  
 Customer relationship starting and ending dates; and, 2006 - present
6. **Franklin County Board of Elections**  
 Matt Kelly, Mgr. Of Absentee Voting  
 (614)525-3473  
[mjkelly@vote.franklincountyohio.gov](mailto:mjkelly@vote.franklincountyohio.gov)  
 BlueCrest products and services provided:  
 Products and services provided by your company; One MSE Inserter, One 72-bin Vantage Sorter, Software, ReliaVote  
 Customer relationship starting and ending dates; and, 2012 - present

## 2.6. Insurance Coverage

2.6.1.	<p><b>General Liability, Property &amp; Automobile Insurance.</b> If your company is selected as the Winning Supplier, during the term of any agreements between your company and Equalis Group, and for two (2) years following expiration or termination of such agreements, your company, at its own expense, will maintain and will require that its agents, subcontractors, or suppliers engaged in your company'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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No
BlueCrest has this coverage.		
2.6.2.	<p><b>Employee Dishonesty – 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 Equalis Group Member utilizing the Program.</p>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
BlueCrest has this coverage.		
2.6.3.	<p><b>Third Party Employment Practice Liability – 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</p>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No



	<p>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 Equalis Group Member utilizing the Program.</p>	
<p>BlueCrest has this coverage.</p>		

## Section 3. Products and Services

### 3.1. Products & Services

3.1.1.	<p><b>Product &amp; Services Description(s).</b> Provide a detailed description of the products and services you are offering as a part of your proposal. <b>IMPORTANT:</b> this description along with the products and services outlined in the Attachment B – Cost Proposal will be utilized to define the overall products and services available under a resulting contract.</p>
<p>See Catalog, attached.</p>	
3.1.2.	<p><b>Open Market Products.</b> Provide a detailed description of your ability to accommodate requests for Open Market Products. Open Market Products is a category of products that cannot be found in your standard catalog offering or non-inventoried products.</p>
<p>The BlueCrest catalog that is a part of this offering will contain all of our products available for purchase.</p>	
3.1.3.	<p><b>Customized Offering.</b> Describe how you are able to customize the program offering to Equalis Group Members.</p>
<p>Each BlueCrest machine is configured based on the customer’s requirements.</p>	
3.1.4.	<p><b>Differentiators.</b> Describe what differentiates your company’s products and services from your competitors.</p>
<p>BlueCrest specializes in full end-to-end mail production.</p>	
3.1.5.	<p><b>Integration.</b> Describe your integration capabilities, if any, with other mailroom-related technologies.</p>
<p>BlueCrest has set the global standard for mail production and can be integrated with other competitor offerings.</p>	
3.1.6.	<p><b>Replacement Parts.</b> Describe your organizations approach to stocking replacement parts and supplies and how quickly you are able to fill orders for those items.</p>

Parts availability will depend on the type of service agreement each customer chooses.

### 3.2. Turnkey Capabilities

3.2.1.	<b>Turnkey Capabilities.</b> Describe the capabilities available through your company and, if applicable, your authorized network of dealers, distributors, and resellers that support your ability to provide turnkey solutions to Equalis Group Members. Your response may include, but is not limited to, site assessment, equipment consultations & recommendation, installation, inspection, and maintenance.
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BlueCrest does not offer turnkey solutions, as the typical equipment sale requires customization based on the customer's requirements and budget.

### 3.3. Installation

3.3.1.	<b>Installation.</b> Is installation available as a part of your proposal? If yes, continue answering the remaining questions in 5.2.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
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Installation requires site evaluation and varies with each customer. It is not a standardized item.

3.3.2.	<b>Installers.</b> Is the installation service performed by a company-owned installation team or one of your dealers or resellers?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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All BlueCrest service and installation is done by BlueCrest employees.

3.3.3.	<b>Qualifications.</b> Describe the qualification of your installation crews. Your response may include, but is not limited to, training and certification requirements.
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BlueCrest installation crews have experience not only with BlueCrest equipment, but for many years when we were the Document Messaging Technology division of Pitney Bowes.

3.3.4.	<b>Cost of Installation.</b> Is the cost of installation included in the product price offered to Equalis Group Members?
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No. Installation requires site evaluation and varies with each customer. It is not a standardized item.

### 3.4. Other Services

3.4.1.	<b>Training.</b> If yes, provide a description of the training services offered. <b>Note:</b> Training services are not limited to those provided to the members but can also extend to the training you provide you dealers, distributors, and resellers.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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BlueCrest People Optimization Services help print mail operations utilize technology and training to increase the capability and efficiency of their workforce to maximize our customers’ productivity using BlueCrest products. BlueCrest offers People Optimization training services in three main categories: 1) Operator Training 2) Technical Maintenance / Repair Training 3) Performance and Productivity Leadership Training. Operator Training are services that enable clients to improve the skill of their people in operating BlueCrest products to maximize the full value of our industry leading technology. The trainings focus on building the core productivity skills of the operator, ensuring reliability and consistency during machine run times. Technical Maintenance / Repair Training are services that enable clients that choose to maintain their BlueCrest equipment themselves to develop and improve the skill and capabilities of their technician workforce in performing basic through advanced repair, maintenance and machine configuration / optimization functions. Performance and Productivity Leadership Training are services to develop core skills and knowledge needed to measure and manage the operational performance of BlueCrest equipment and drive continuous improvement. BlueCrest training services are delivered in multiple formats (live, virtual, online), modalities (instructor-led, self-paced), and environments (classroom, field / on-the-job).

3.4.2.	<b>Maintenance Services.</b> If yes, provide a description of the maintenance services included in your proposal.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
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BlueCrest equipment maintenance services help print mail operations maintain the highest levels of machine uptime and available capability through best-in-class equipment maintenance, repair, and performance management delivered by BlueCrest Global Services. BlueCrest Global Services is BlueCrest’s Services business unit that provides full lifecycle equipment maintenance and support services for BlueCrest and 3rd party equipment. Our maintenance service delivery models span full on-site dedicated service, on-call (call-out) service, and remote help-desk services. BlueCrest Global Services has approximately 920 employees worldwide, including 775 certified service technicians. BlueCrest’s equipment maintenance and repair services are typically sold as annual or multi-year equipment maintenance agreements (EMA). BlueCrest EMAs provide all remedial repair and preventative maintenance necessitated by normal usage for covered assets and include replacement of parts, excluding consumable parts / supplies. BlueCrest EMAs are fixed price agreements and are either on-site service (i.e., dedicated support resources on site for specified coverage) or on-call (i.e., call-out) service with typically guaranteed 4-hour response times. In addition, BlueCrest offers remedial and preventative maintenance services on a time and materials basis for non-EMA clients.

3.4.3.	<b>Other Services.</b> Describe any other services your organization offers directly associated with your products but has not been addressed in the RFP.
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BlueCrest Productivity Services help print mail operations achieve industry leading costs of production and operational excellence through process optimization, continuous improvement systems, and technology enhancement delivered by BlueCrest’s professional services team. Our global experience and knowledge of best practices for work cell set up and operation help our clients to improve productivity and reduce rework. Our optimization specialists enable our clients to best utilize technology, people and process to obtain maximum value from their operations and assets. BlueCrest Productivity Services are led by Continuous Improvement project leaders that are highly experienced in Lean Six Sigma techniques applied in Print and Mail operational environments.

### 3.5. Additional Features

3.5.1.	<b>Value Add.</b> Describe any other features or capabilities relating to this RFP that would improve or enhance the Program. Your response may include, but is not limited to, additional products and services, ecommerce capabilities, marketing capabilities, green initiatives, and technological advancements.
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BlueCrest implements green initiatives to reduce waste, save energy, and curtail emissions in the manufacturing process. BlueCrest also began a print head recycling initiative in 2019. BlueCrest software and equipment innovations provide rapid mail handling which saves our customers time, labor, and money.

### 3.6. Additional Offerings

3.6.1.	<b>Other Capabilities.</b> Identify and describe any other products and/or services your company offers outside the primary scope of this RFP that can be made available to Equalis Group Members. Include proposed pricing for any additional products or services your company offers in <b>Attachment B – Cost Proposal</b> in accordance with the directions provide in <b>RFP Section 2.3 Cost Proposal &amp; Acceptable Pricing Formats</b> .
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All BlueCrest offerings are in-scope.

### 3.7. Warranty

3.7.1.	<b>Warranty.</b> Provide a copy of the manufacturer’s warranty. If required, please attach the warranty as an attachment, as instructed in this document. Describe notable features and/or characteristics of the warranty that a public sector customer would find interesting or appealing. Pricing related to the any extended warranty options must be included in <b>Attachment B – Cost Proposal</b> .
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BlueCrest is the manufacturer. All BlueCrest equipment includes a ninety (90) days warranty. See our sales agreement for more details.

## Section 4. Business Operations

### 4.1. Logistics

4.1.1.	<b>Distribution Capabilities.</b> Describe how Bidder proposes to distribute the products/service nationwide.
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All BlueCrest equipment and software is custom configured and installed in coordination with our customers’ schedules. BlueCrest consumable items may be purchased through MarketPlace, our online portal, and we ship those items as directed by our customer.

4.1.2.	<b>Distribution Centers.</b> Provide the number, size and location of Supplier’s distribution facilities, warehouses and retail network as applicable.
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BlueCrest has its main US manufacturing facility with a distribution center in Danbury, CT. BlueCrest has an additional distribution center in Ohio.

4.1.3.	<b>Supply Chain.</b> Identify all other companies that will be involved in processing, handling, or shipping the products or services to the Equalis Group Member.
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N/A. BlueCrest does all processing, handling, shipping, installation, service, and maintenance.	
4.1.4.	<b>Fill Rates.</b> Provide fill rates and average delivery timeframes met by specific distribution centers.
N/A	
4.1.5.	<b>On Time Delivery Rate.</b> Provide your average on-time delivery rate.
99%	
4.1.6.	<b>Expedited Orders.</b> Describe your approach to handling emergency orders and/or service. Your description may include, but is not limited to, response time, breadth of service coverage, and service level.
Each BlueCrest mail machine is custom manufactured, and service levels vary based on the type of service contract a customer decides to purchase, driven in part by their operational requirements. For consumables orders, BlueCrest ships based on the customers' directions, including expedited if so ordered. For emergency service and software support, BlueCrest provides 24 X 7 assistance and escalation procedures aligned with our service contract requirements.	

## 4.2. Customer Service

4.2.1.	<b>Customer Service Department.</b> Describe your company's customer service department & operations. Your description may include, but is not limited to, hours of operation, number and location of service centers, parts outlets, number of customer service representatives. Clarify if the service centers are owned by your company or if they are a network of subcontractors.
BlueCrest owns its own customer service center and provides toll-free access available 24 X 7 in one service center; BlueCrest's primary customer service and support occurs in the field through our over 600 field technicians through either on-call or on-site service contracts.	
4.2.2.	<b>Complaint Resolution.</b> Describe your customer complaint resolution process. Describe how unresolved complaints are handled.
BlueCrest takes pride in its products and services and works to resolve disputes to our customers' satisfaction.	
4.2.3.	<b>Product Returns.</b> Describe your product return policy and procedures.
BlueCrest does not accept returns unless our products fail to meet the express warranties on our agreement.	

### 4.3. Order & Invoice Processing; Payment

4.3.1.	<b>Purchasing Options.</b> Describe the different channels in which this contract will be made available to Equalis Group Members. Your response should include, but is not limited to, whether your organization will serve as the single point of contact or if the contract will be made available to your dealers and resellers.
BlueCrest will be the single point of contact.	
4.3.2.	<b>Order Process.</b> Describe your company's proposal development and order submission process.
The initial consultation with a customer is with a BlueCrest sales representative. A team of engineers assist in developing a proposal (or two) to meet the customer's specific needs. Our customers sometimes are not fully aware of the full scope of mail management equipment and software, so this is an educational process. Once the customer signs off on a project plan, the order is processed and queued for production.	
4.3.3.	<b>Invoice Process.</b> Describe your company's invoicing process.
BlueCrest invoices for all equipment in either milestone payment plans, or 100% payment, with all payments (in full) dues prior to equipment installation. Consumable orders are shipped per customer instruction, with payment due within thirty (30) days.	
4.3.4.	<b>Payment.</b> What are your standard payment terms? What methods of payment do your company accept?
Payments are due Net 30. Payment in full is required prior to installation for all equipment purchases.	
4.3.5.	<b>Financing.</b> Does your company offer any financing options or programs? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
No. BlueCrest does not offer any financing.	
4.3.6.	<b>Leasing.</b> Does your company offer any leasing options or programs? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
BlueCrest does offer leasing options.	

### 4.4. Members Contracting for Services

4.4.1.	<b>Customer Set Up.</b> Once an Equalis Group 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?
All a member needs to do is contact our prime point of contact and a sales representative will then reach out to the Member.	
4.4.2.	<b>Customer Agreements.</b> Does your company have standard customer agreements? If yes, please provide copies of any standard customer agreements and describe your process and <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

	timeline for reviewing, negotiating, and finalizing any customer-specific contract terms or requirements.	
See attached BlueCrest Sales and Maintenance Agreement.		

#### 4.5. Sustainability, Reclamation, and Recycling Initiatives

4.5.1.	<b>Sustainable Company Initiatives.</b> Describe the ways in which your company is addressing the issue of sustainability.
BlueCrest implements green initiatives to reduce waste, save energy, and curtail emissions in the manufacturing process. BlueCrest also began a print head recycling initiative in 2019. BlueCrest software and equipment innovations provide rapid mail handling which saves our customers time, labor, and money.	

### Section 5. Go-To-Market Strategy

#### 5.1. Bidder Organizational Structure & Staffing of Relationship

5.1.1.	<b>Key Contacts.</b> Provide contact information and resumes for the person(s) who will be responsible for the following areas; Executive Contact, Contract Manager, Account Manager/Sales Lead, Reporting Contact, and Marketing Contact. Indicate who the primary contact will be if it is not the Account Manager.															
<table border="0"> <tr> <td>Executive Contact: Susan Gabrielsen</td> <td><a href="mailto:Susan.Gabrielsen@bluecrestinc.com">Susan.Gabrielsen@bluecrestinc.com</a></td> <td>914-262-3456</td> </tr> <tr> <td>Contract Manager: Mel Norris</td> <td><a href="mailto:Mel.Norris@bluecrestinc.com">Mel.Norris@bluecrestinc.com</a></td> <td>475-204-3087 x 91147</td> </tr> <tr> <td>Account Manager: Tom Tanaka</td> <td><a href="mailto:Tom.Tanaka@bluecrestinc.com">Tom.Tanaka@bluecrestinc.com</a></td> <td>310-373-6992</td> </tr> <tr> <td>Reporting Contact: Mel Norris</td> <td><a href="mailto:Mel.Norris@bluecrestinc.com">Mel.Norris@bluecrestinc.com</a></td> <td>475-204-3087 x 91147</td> </tr> <tr> <td>Marketing Contact: Stephanie Triggiani</td> <td><a href="mailto:Stephanie.Triggiani@bluecrestinc.com">Stephanie.Triggiani@bluecrestinc.com</a></td> <td>475-204-3087</td> </tr> </table>		Executive Contact: Susan Gabrielsen	<a href="mailto:Susan.Gabrielsen@bluecrestinc.com">Susan.Gabrielsen@bluecrestinc.com</a>	914-262-3456	Contract Manager: Mel Norris	<a href="mailto:Mel.Norris@bluecrestinc.com">Mel.Norris@bluecrestinc.com</a>	475-204-3087 x 91147	Account Manager: Tom Tanaka	<a href="mailto:Tom.Tanaka@bluecrestinc.com">Tom.Tanaka@bluecrestinc.com</a>	310-373-6992	Reporting Contact: Mel Norris	<a href="mailto:Mel.Norris@bluecrestinc.com">Mel.Norris@bluecrestinc.com</a>	475-204-3087 x 91147	Marketing Contact: Stephanie Triggiani	<a href="mailto:Stephanie.Triggiani@bluecrestinc.com">Stephanie.Triggiani@bluecrestinc.com</a>	475-204-3087
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Marketing Contact: Stephanie Triggiani	<a href="mailto:Stephanie.Triggiani@bluecrestinc.com">Stephanie.Triggiani@bluecrestinc.com</a>	475-204-3087														
5.1.2.	<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, etc.															
<p>BlueCrest’s North American sales organization is comprised of over twenty-five experienced Sales Executives representing the legacy BlueCrest product family. This Sales Organization represents the entire BlueCrest portfolio to our customers. Supporting this front line customer-facing team are pre-sales BlueCrest engineers with deep expertise in each facet of our product line, who work in tandem with the Sales Executives. Additionally, we have a dedicated focused sales team supporting the newest elements of our BlueCrest family, including BCC Software products.</p> <p>Specific geographic alignment and named accounts are adjusted periodically and the specific territory allocations are not included here. If an opportunity surfaces, the appropriate Sales Executive will be quickly identified and assigned to that Equalis Member. Conversely, through the support of the Government Contracts Center of Competence, each Sales</p>																

Executive will have appropriate knowledge of, and ability to leverage the Equalis contract during the course of each customer engagement.

BlueCrest solutions are designed with a high level of modularity and customizable features, and in the normal course of engagement, Equalis Members will work with a Sales Executive and their pre-sales engineer to align the Member's requirements with appropriate solution elements that meets or exceeds their requirements. In the event that consumables are required, Equalis Members may order these directly from the BlueCrest MarketPlace, an online purchasing portal accessible through the BlueCrest website at [www.bluecrestinc.com](http://www.bluecrestinc.com).

All members of the BlueCrest sales and service organization are full time employees. While BlueCrest does have several resellers in the North America market, they do not have access to BlueCrest contract vehicles. As such, Equalis Member engagements will be directly with BlueCrest employees.

## 5.2. Contract Implementation Strategy & Expectations

5.2.1.	<b>Five (5) Year Sales Vision &amp; Strategy.</b> Describe your company's vision and strategy to leverage a resulting contract with Equalis over the next five (5) years. Your response may include, but is not limited to; the geographic or public sector vertical markets being targeted; your strategy for acquiring new business and retaining existing business; how the contract will be deployed with your sales team; and the time frames in which this will be completed.
--------	---

BlueCrest's existing as well as new government and non-profit customers will continue to see value in paper communications, in some cases, due to statutory requirements, in other cases, such as tax bills, or Vote-By-Mail, in order to tacitly verify residency. BlueCrest's global reach and commitment to world-class customer satisfaction and exceptional service around the globe means we will have products and capabilities to meet the 24 X 7 demands of high volume mailers today, and well into the future. BlueCrest's five year plan includes ongoing innovation in our service and financial models to improve customer retention, protect revenue, and provide competitive differentiation. BlueCrest will continue to expand its core product presence with enhanced competitiveness and increased penetration of mid-tier markets, all while continuing to deliver targeted growth from adjacent opportunities in select markets. BlueCrest has government/non-profit vertical sales executives who will welcome the Equalis Members through ease of cooperative purchase and streamlined procurement through this Member agreement, and once launched, this will provide an easy path forward for these customers.

5.2.2.	<b>Sales Team Incentives.</b> Will your sales team be equally incentivized to leverage the Equalis Group Master Agreement when compared to their typical compensation structure?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
--------	--	---

No change in compensation for sales under this agreement vs. directly to BlueCrest.

5.2.3.	<b>Revenue Objectives.</b> What are your sales revenue objectives in each of the five (5) years if awarded this contract?
--------	---

BlueCrest would like to see at \$8MM - \$10M in annual sales under this agreement.



## Section 6. Administrative Requirements

### 6.1. Admin Fee & Reporting

6.1.1.	<p><b>Administrative Fee.</b> Equalis Group only generates revenue when the Winning Supplier generates revenue based on contract utilization by current and future Members. The proposed Administrative Fee for this contract is two percent (2%) based on the terms disclosed in the <b>Attachment D – Model Administration Agreement</b>.</p>	<input type="checkbox"/> Agree <input checked="" type="checkbox"/> Negotiate
<p>BlueCrest proposes a 1% Administrative Fee, due to the nature of our complex, custom offering.</p>		
6.1.2.	<p><b>Sales &amp; Administrative Fee Reporting.</b> Equalis Group requires monthly reports detailing sales invoiced the prior month and associated Administrative Fees earned by the 15<sup>th</sup> of each month. Confirm that your company will meet this reporting requirement. If not, explain why and propose an alternative time schedule for providing these reports to Equalis Group.</p>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
<p>BlueCrest proposes quarterly reporting, due within thirty (30) days after the end of each calendar quarter.</p>		



# BLUECREST

Equalis Member Offering

March 2021

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## Statement of Capabilities - Catalog for Equalis Group Members

BlueCrest, now an independent company, manufactures and distributes the world's most comprehensive set of hardware and software solutions for; data management, document control and tracking, production printers, mail inserters, mail sorters and parcel sorting solutions with the ability to scale across the size and scope of most government agency, enterprise or agency needs. With the recent acquisition of BCC Software, we have complemented our core portfolio with critical data management capabilities such as Presort and address quality, data quality services and intelligent mailpiece tracking.

We are a US based manufacturing and development company with a global presence. For Equalis Members, it is critical to note that we are headquartered in Danbury, Connecticut with the BCC Software business unit located in Rochester, NY. The BlueCrest organization spans North America with regional sales and service presence. We have a strong US service team with almost 500 highly trained and experienced technicians nationwide.

Innovation and continued product growth are core tenets at BlueCrest. We continue to make significant investment in research and development and have over 2,000 patents associated with BlueCrest products.

BlueCrest has long had a presence in the government vertical with government customers ranging from local municipalities, state and regional government entities, higher educational institutions and Federal government agencies. All of this expertise and relevant solution development will be brought to bear for the members of the Equalis community.

We have been in this market for almost **40** years and are proud of our product innovation and success. Not only do we bring leading edge, scalable technology to the market but we also provide turn-key support services including design, installation and planning and ongoing support if desired. Our engagement process begins with our US regional sales team to understand and define the customer requirements and develop a customized configuration. Our product set is highly modular and customizable to specific customer needs. Based on the initial customer scope requirements, equipment maintenance and service offerings are also attached to each Member's final proposal.

Because BlueCrest's product suite is expansive, we have provided a comprehensive overview of our key products. Our product modularity is also reflected in the accompanying Cost Proposal.

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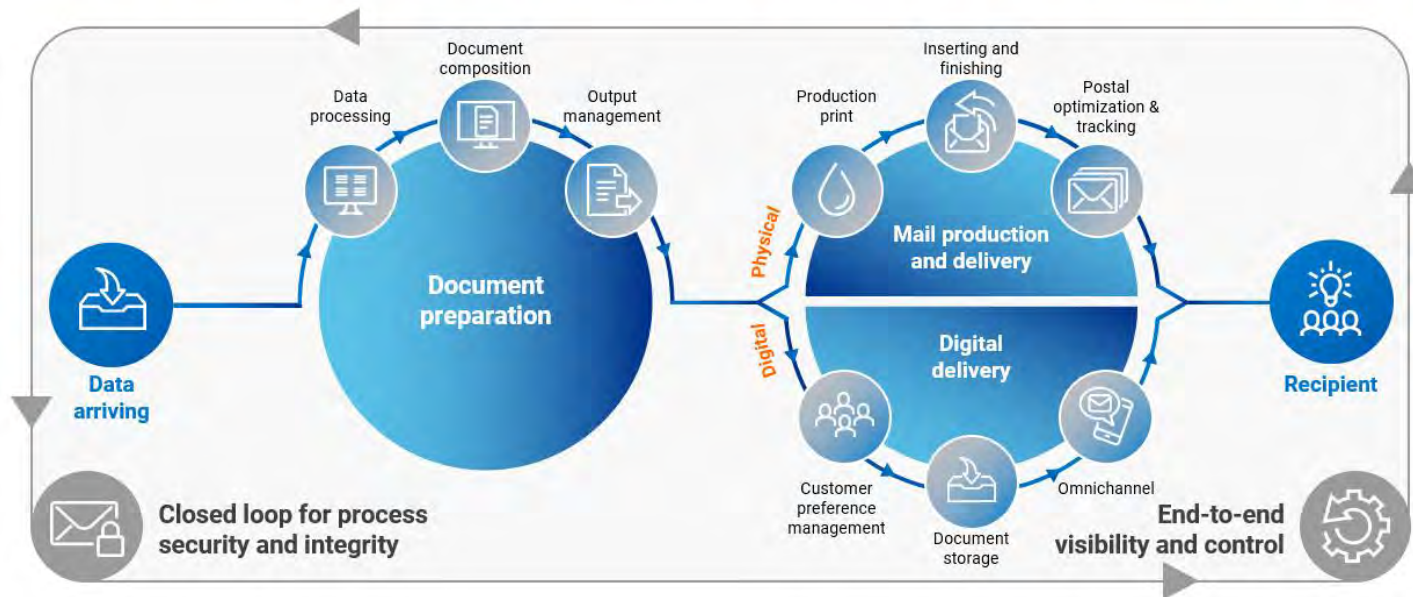
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## BlueCrest Solutions Overview

The BlueCrest solutions described in this catalog address the end-to-end BlueCrest solutions for creating and managing data delivery process. The process is laid out below and addressed through an integrated set of software and hardware products, the breadth of which is unique to BlueCrest.

### Experts in the document preparation, production, and delivery process



The specific products are mapped out in this diagram and covered at a high level in the section of the BlueCrest response. Specification details are provided as well, enabling a detailed product review.

## BlueCrest: The most comprehensive portfolio in the market today

<b>PRINT</b>	 <b>NEW EvoluJet®</b>	 <b>AcceleJet®</b>	 <b>IntelliJet 20® HD with HP Brilliant Inks™</b>	 <b>IntelliJet 42® HD</b>			
<b>INSERT</b>	 <b>Pulse™</b>	 <b>Evolution</b>	 <b>Mailstream Productivity Series</b>	 <b>FlowMaster</b>	 <b>Epic® Inserting System</b>		
<b>LETTER &amp; PARCEL SORT</b>	 <b>EZ-Flats™</b>	 <b>Vantage™</b>	 <b>VariSort™</b>	 <b>OneSort®</b>	 <b>TrueSort™ Prime</b>		
<b>SOFTWARE</b>	<b>Output Manager</b>	<b>Output Visual Editor</b>	<b>DFWorks</b>	<b>Address Quality</b>	<b>Mail Tracking</b>	<b>OfficeMail</b>	<b>Clarity/DirectView</b>
<b>GLOBAL SERVICES</b>	<b>Powered by BlueCrest Customer Service and Technical Support</b>						

While these products comprehensively address the full scope of securely preparing, producing, and delivering documents to the recipient, BlueCrest has also invested to create specific industry solutions which are advantageous to state and local governments, as well as non-profit enterprises. These solutions are:

- **ReliaVote Vote By Mail Solutions** – a modular solution set for organizations seeking to create and print ballots and related voting materials, securely mail and track ballots, and enable inbound processing of completed ballots.
- **BlueCrest Lockbox Solutions** – an inbound mail processing solution for secure tracking and sorting of remittance mail pieces, suitable for agencies with high inbound physical check payment streams.

All of these products are covered by the BlueCrest Global Services Support team with services ranging from basic installation through turnkey implementations, all with ongoing support services.



## BlueCrest Digital Solutions: data, insight, and workflow solutions

BlueCrest’s suite of software solutions can be absorbed into your current environment in whole or in part. Wherever you are within your operation, from a green field, to working with legacy systems and files, the appropriate elements of the BlueCrest solution can be selected and deployed. Data cleansing, optimizing, editing files such as adding a 2D or IMB barcode, to tracking every piece of data that becomes a piece of mail from host to post and back, BlueCrest has solutions.

The graphic below provides a functional overview of the BlueCrest software product portfolio.

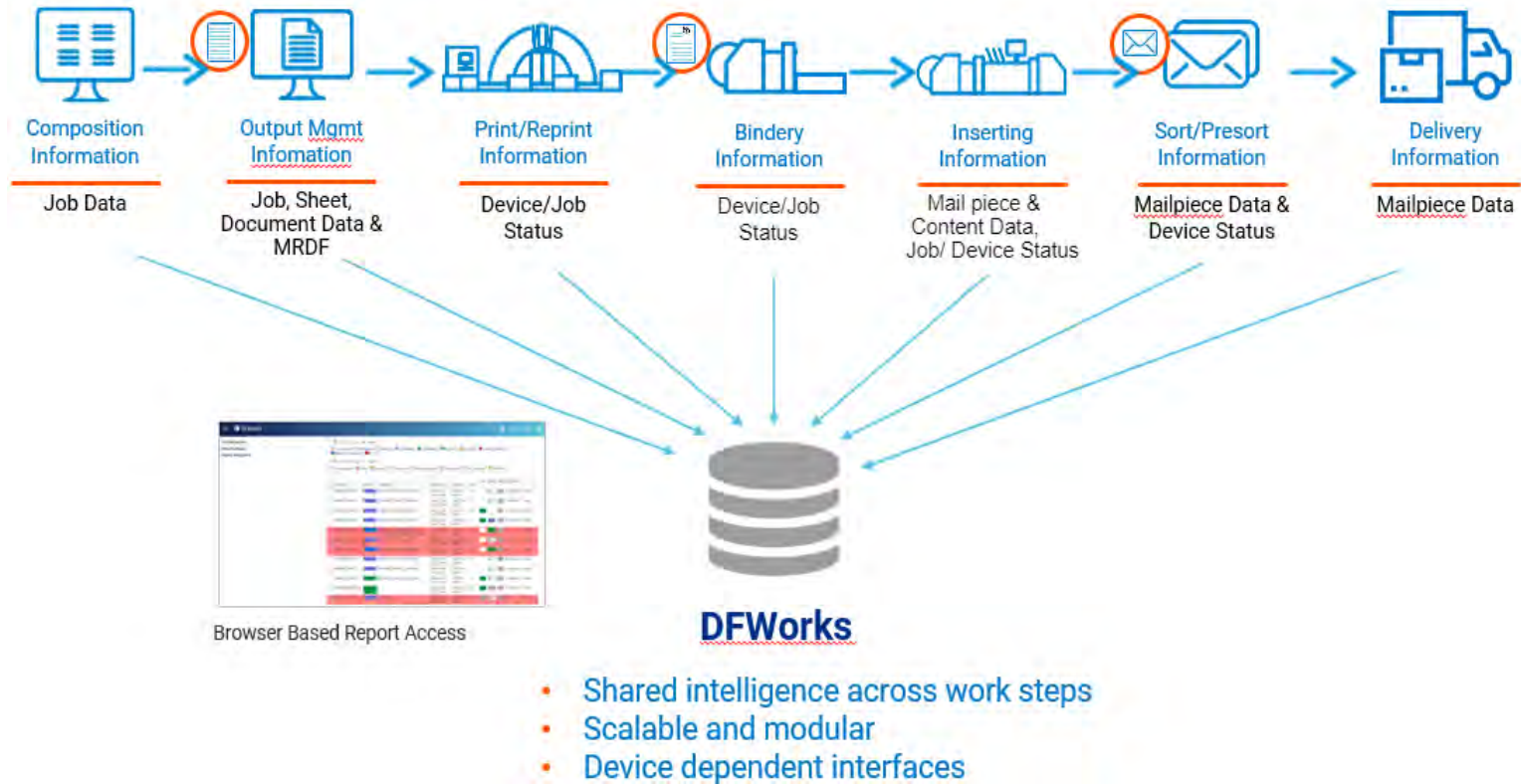
<h3>Fine tune workflow to ensure document integrity</h3>	<h3>Improve productivity with data and insight</h3>	<h3>Achieve postal compliance and savings</h3>
		
<p><b>Output Management</b> Powerful capabilities for transformation, re-engineering and enhancement of documents for optimized production and multi-channel delivery.</p> <ul style="list-style-type: none"> <li>• Output Manager</li> <li>• Enterprise Manager</li> <li>• NEW Output Enhancement Visual Editor</li> <li>• OfficeMail</li> <li>• NEW Project (MC3)</li> </ul> <p><b>DFWorks</b> Integrated solutions to monitor, measure and track the status of workflows, resources, jobs and individual mailpieces. It helps simplify and automate time-consuming production planning and analysis tasks</p> <ul style="list-style-type: none"> <li>• Production Workflow</li> <li>• Document Lifecycle Tracking</li> <li>• Client Job Tracking</li> <li>• Mail Run Manager</li> </ul>	<p><b>Clarity solutions</b> Accelerate results by ensuring maximum output and minimum Downtime. Equipment sensor data helps to predict and address equipment and operator issues before they occur.</p> <ul style="list-style-type: none"> <li>• Clarity Advisor</li> <li>• Clarity Optimizer</li> </ul> <p><b>DirectView</b> Improve operational success by comparing actual performance to plan, understanding reasons why plan goals are not being met and determining what must be done to increase productivity.</p> <ul style="list-style-type: none"> <li>• DirectView Interface</li> <li>• DirectView Dashboard</li> <li>• DirectView Inserter Reporter</li> <li>• NEW DirectView for Print</li> </ul>	<p><b>DFWorks</b> Precise tracking and control of high-volume expenditure. Take maximum advantage of postal discounts.</p> <ul style="list-style-type: none"> <li>• Postage Accounting</li> <li>• Postal Manifesting</li> </ul> <p><b>Address Quality &amp; Mail Tracking</b> Ensure delivery and compliance with address quality and mail tracking services.</p> <ul style="list-style-type: none"> <li>• NEW Address Quality (CASS, PAVE, NCOA)</li> <li>• NEW Mail Tracking (IMb tracking)</li> <li>• SortEngine 360 (NCOA)</li> <li>• NEW BCC</li> </ul>

Print & Mail Workflow - gain additional control and make every aspect of your operation more powerful, more flexible, and more accurate.

- **Output Manager** – Real-time document processing and print stream transformation. Provides organizations the ability to free your document production from the limitations of legacy systems, proprietary vendors and diverse data streams. Any-to-any print stream transformation bringing out the best in existing infrastructures, allowing you to automate and optimize workflow across multiple formats and devices.
- **Enterprise Manager**- Utilizing output manager for multiple sites for workload balancing, disaster recovery support across multi-site, multi-tenant environments resulting in reduced downtime while accelerating output and gaining control for job-level accounting, while encrypting data transmission and security. This product is particularly well suited for government centralized print and mail functions to enable redundancy.
- **Output Enhancement Visual**- Quickly and easily transform and enhance existing print-ready documents while extending the life of your legacy documents. You can update documents using a modern interface for fast execution *without IT resources* or change the underlying legacy business application. Easily re-engineer the print stream with the ability to add application steps such as striping out the address data then cleansing, adding barcodes, such as the intelligent mail barcode, or adding 2D barcode to ensure document production has full integrity end-to-end. Creating a powerful, flexible and secure operation.
- **OfficeMail**- moves desktop produced communications to the security of a centralized mail production environment. This solution is suited for agencies or environments with distributed personnel. This extends the security of a centralized print and mail function to the end user desktop wherever they are located. Given the expansion of distributed personnel given the pandemic working environment, OfficeMail adds security barcodes and creates an audit trail for every mailed piece. Even in an environment where the agency or district may have outsourced mail production, OfficeMail can be utilized to channel distributed work into the outsourced provider – again enhancing security and auditability.
- **DFWorks** is an integrated set of intelligent tools for the Automated Document Factory to manage:
  - Compliance
  - Workflow Control & SLA Attainment
  - Operational Efficiency
  - Postal Optimization
- **DFWorks** functions across multiple process steps to enable auditability and tracking throughout the process.



# Integrated Print and Mail tracking and reporting



DFWorks Modules can be deployed separately as the functionality is required

- **DFWorks Document Lifecycle Tracking Module (DLCT)** – this tool gives you easy access to historical mailpiece production and delivery information for proof of process reporting. From in-process to recently mailed or even returned mail with the reason, reporting is flexible, customizable, and gives you the ability to monitor, track, and audit.
- **Production Workflow Module** - Job and workflow tracking solution for SLA attainment provides a 360-degree view of production processes with multi-step, multi-site job workflow tracking to support SLA attainment and proof of process and your team can **monitor** the specific information they need to help ensure that everything is running smoothly and on time. If there is a processing issue or problem that could put SLAs at risk, customized **alerts** are immediately sent so your staff can

make intelligent adjustments based on priorities and backup procedures. All of your workflow details and information are archived for on-demand and automated report generation, which can be useful to measure SLA attainment over time and to create recommendations for process **improvement**.

- Manage multiple jobs across multiple customer agencies and multiple sites for every automated and manual workflow step.
  - Provide job-level reconciliation with time-stamped activity reports for proof of process to verify SLAs and ensure regulatory compliance with information collected for every designated process from start to finish.
  - Define and manage SLA attainment at any level – customer, job, or site.
  - Identify potential delays and create custom alerts for jobs in queue, in progress, or complete, so your team can take action, where required.
  - Flag certain jobs as higher priority to keep track of what is most critical to your business.
  - Increase our customer's client retention by providing the ability to view job status via Web accessible graphic displays
  - Provide job-level reconciliation for proof of process to verify SLAs and ensure regulatory compliance with information collected for every designated process from start to finish.
  - Automatically document the timelines of your jobs and show the results for all processes with time stamped activity reports.
- **DFWorks® Mailrun Management Module** automates your mail production and provides a streamlined and accountable workflow for both your print and mail runs as well as insert production and management. Working in conjunction with your BlueCrest Direct Connect inserters, job information is entered into DFWorks Mail-run Management—name, chargeback account, postage meter setting, piece weight, images of inserts, outer and inner envelopes images and more. Information becomes viewable in workstations during all steps resulting in:
    - Reduced operator error by automating and simplifying inserter setup
    - Improved reporting accuracy through automated job parameter entry
    - Reduced job changeover time by eliminating operator setup steps
    - Facilitates correct insert loading with image-based operator instructions
  - **DFWorks Postage Accounting & Funds Management Module** provides comprehensive tracking and reporting of postage and shipping expenses utilizing intelligent funds management. Postage accounts for ~73% of the cost of mailing and is a critical focus in cost conscious environments such as government and educational institutions the solution includes the ability to include expenses from integrated postage meters, manifested mail and even integrated shipping systems. This results in the ability to tightly control postage, effectively plan postage costs, and eliminate extensive manual reconciliation.

Clarity™ Optimizer

- BlueCrest Clarity Optimizer Solution helps drive productivity and business outcomes with an intelligent view into your print and mail operation. Clarity Optimizer provides powerful insights and predictive analytics to accelerate results for your business driving maximum output and minimum downtime. Leverage real-time and historical inserter sensor data to help uncover and resolve equipment and operator opportunities onsite. Clarity Optimizer is a cloud-based, secure application that can be accessed virtually from any location so that you can monitor the efficiency of your BlueCrest inserter equipment, applications, and machine operators.
- Clarity Optimizer provides complete transparency across your print and mail operations to drive maximum efficiencies and cost savings. It leverages Microsoft Power BI, for quick, efficient drill downs to understand root causes and address critical issues faster, turning complex data into business insights.
- Clarity Optimizer will help you evaluate current and historical production metrics from a single inserting system to several systems across one or more locations. You can easily monitor and measure results for continuous improvement and easily sort data and use specific metrics that matter most to your operation.

### DirectView

Video: <https://youtu.be/iUDb8XI6Xas>

- Improve your inserting operations success by monitoring your SLAs at a glance, comparing actual performance to plan, understanding reasons why plan goals are not being met, and determining what must be done to increase productivity and meet SLAs.
- **DirectView Interface** monitors job progress and provides data analytics for immediate corrective action. Operators can see real-time job progress and status displayed on an easy-to-read, color coded interface. Set and track goals to ensure SLA attainment and measure against real-time productivity and efficiency metrics and indicators such as defects and alarms.
- **DirectView Dashboard** puts detailed inserter workcell insight at your fingertips with real-time production floor progress. Monitor the real-time status of every job, inserter and shift, and intervene to maintain optimal performance and SLA compliance. Leverage the data insight for immediate corrective action and continuous improvement. You can even monitor service requests from the dashboard interface and collect real-time data that can be sent with a personalized message via email.
- **DirectView Reporter** leverages the data collected from the inserting systems to enable operations to measure and manage the root cause of productivity losses. With the ability to accurately track machine stops, operator stops, idle time, setup time and unscheduled downtime, operations will have an accurate representation of their true operational efficiencies. Continuous improvement initiatives can then be focused on reducing production losses and increasing runtime and asset utilization.
- **Address Quality Solutions** Reduce undeliverable mail for improved operational performance and cost savings by making sure every mailpiece gets delivered to the right person with our address hygiene solutions. Your business will maintain USPS compliance and qualify for the maximum postal discounts. About 40 million Americans move each year making it a challenge to keep addresses

current. As part of an integrated, end-to-end solution, you can easily make updates and corrections to mailing addresses to ensure every communication your print and mail gets delivered correctly.

- Coding Accuracy Support System (CASS™) corrects ZIP™ and delivery point codes to maintain USPS postal compliance
  - National Change of Address (NCOA<sup>LINK®</sup>) securely tracks Change of Address (COA) on file with the USPS and keeps you Move Update compliant
  - Qualify for maximum postal discounts and avoid compliance issues
  - Minimize returned and Undeliverable-As-Addresses (UAA) mail pieces
  - Implement address hygiene upstream and avoid costly reprint and postage
- **Mail Tracking Solutions** enable the generation of a full service IMb for enhanced, unique mail piece tracking through the USPS.

### BlueCrest production print solutions overview

BlueCrest entered the production print marketplace with the strategic objective of becoming a vertically integrated print and mail solutions provider for our customers. While understand that many organizations have multiple suppliers at different stages of their print and mail operation (e.g., print, insertion, software, sortation/ presorting as well as service and supplies), we believe this can result in inefficiencies, higher costs, and islands of automation.

At BlueCrest, we understand your print, mail needs, and can help Equalis members by:

**Understanding your operational efficiencies:** We implement and execute into your operation with an integrated approach and in-depth understanding of how other process and systems must function, whereas other vendors may participate without the knowledge of other print and mail processes or inputs. For example, when you invest in high-speed production inkjet printing systems, the resulting increase in operational productivity can be limited by downstream mail finishing capacity, creating a bottleneck. As a leader in transactional print and mail, we consider the end-to-end workflow and impact across your operation. We know how to maximize each point of production, which will yield the maximum operational efficiencies across your operation.

**Discount savings:** A proportionate savings can be recognized by consuming goods and services (“G&S”) from a single vendor, since the cost of doing so is likely less than that of consuming each G&S separately. For example, businesses who purchase both printing and inserting systems from a single provider can benefit from consolidated service and technical support across all platforms. Consider a customer whose operation has SLA requirements that demand on-site support for their printing systems and inserting systems. Typically, this would require a service contract and on-site representative from each provider; one for the inserting system(s) support and one for the printing systems(s) support. By working with a single vendor—for print, inserting and service—there is an opportunity for cost savings leveraging a single service contract and on-site resource. Additionally, working with a single provider can result faster and more efficient integration time helping earn a return on your investment much more quickly.

**Supplier risk management:** Operation managers understand how dependent they become when they rely on a diverse group of suppliers in order to achieve business objectives. Having one supplier with industry-proven, leading capabilities that can fulfill their obligations

fundamentally eliminates this threat. Single-supplier expertise also means clear accountability, with one partner who can help you solve challenges at every step in the end-to-end print and mail process.

**Service support:** Transactional and personalized communications print and mail production is complex, and the risk and cost of mistakes or missing SLA's can be high. From installation and repair to preventive maintenance and asset redeployment, BlueCrest Global Services provide a single point of accountability. With over 900 certified customer service representatives boasting proven skills and experience, our support goes beyond exceptional...it is unrivaled in the industry. We take a proactive approach to preventive maintenance through remote diagnostics and monitoring as well as Industrial Internet support. Using advanced maintenance scheduling, machine production can increase as much as 23%. Having single-source providers can reduce overall operational costs by up to 14%, and vendors with overall accountability reduces management cost and time by 17%. Our flexible service programs are designed to meet our customers' needs. On-site, on-call, or on-line, BlueCrest Global Services enhances service delivery to meet our customers' ever-changing requirements.

## BlueCrest Production Print Solutions

### EvoluJet Printer™

Web page: <https://www.bluecrestinc.com/products/printers/evolujet/>

Video: [https://youtu.be/Y\\_PtlwTj1I](https://youtu.be/Y_PtlwTj1I)

This is an inkjet printer built for entry to inkjet printing with volumes under 1.5 million print impressions per month.

The EvoluJet™ printing system delivers the productivity, flexibility, and reliability you demand in your print and mail environment from a *four-color, cut-sheet printer*. Featuring proven inkjet technology from Kyocera, you will achieve outstanding print output from a system that is easy to operate with proven integration and support from BlueCrest. Whether you are looking to replace toner systems or add a more effective platform for shorter runs and reprints, the EvoluJet will deliver a strong return on investment.

There are three variations on the configuration available in the EvoluJet printer:



EvoluJet with a single cut-sheet vacuum feeder and single output stacker configuration



EvoluJet with a single cut-sheet vacuum feeder and dual output stacker configuration



EvoluJet with a dual cut-sheet vacuum feeder and dual output stacker configuration

Enabling customers with a powerful combination of high productivity and flexibility in a full-color, cut-sheet, production inkjet printer. Based on the Kyocera TASKalfa Pro 15000c, the EvoluJet printing system is a cost-effective alternative to toner systems.



- Proven print heads and inkjet technology ensure outstanding print output in color or monochrome.
- Ideal for mission-critical applications including bills, statements, customer communications, and voting ballots.
- Low acquisition and operating costs make it an ideal solution for monthly print volumes from 250,000 to 1,500,000 impressions per month.
- Print up to 146 letter-sized [150 A4] impressions per minute.
- High-capacity feeders and output stackers provide 10,000 sheet capacity to deliver over 2-hours of continuous operation.
- Non-stop performance made possible with high-volume ink capacity and the ability to load and unload paper while printing.
- Supports a wide range of media handling up to 360 gsm weight and standard sheet sizes up to 12" x 18".
- Process pre-printed forms as well as 100% variable data color print as part of a White Paper Factory.

AcceleJet™ Full Color Inkjet Printing and Finishing System

Web page: <https://www.bluecrestinc.com/products/printers/accelejet-printing-and-finishing-system>

Video: <https://youtu.be/iP0nP9uOiOQ>



For jobs that consist of forms printed in one area with color, and variable information added in a two-step process, the AcceleJet is a game changer! The AcceleJet printing and finishing system is designed to help mid-sized print and mail operations realize the operational performance and business improvements that come with upgrading to color inkjet. With the capabilities of a white paper factory solution, you can transform plain white rolls of paper into a colorful, personalized communication, *at a lower cost per piece*. With the AcceleJet, your organization can:

- Gain productivity starting every job from rolls of white paper.

- Eliminate the need to warehouse pre-printed paper forms.
- Move from monochrome to 100% variable, full color output.
- Create communications that deliver greater business impact by adding personalized content and offers.
- Implement changes or make updates to applications faster than using pre-printed paper forms.
- Produce cut sheet output optimized for processing on BlueCrest inserting systems.

The AcceleJet system delivers two to five times more throughput as the fastest small-format inkjet printing system available on the market today. Its built-in flexibility is designed to help you achieve your operational goals. The variable print modes enable you to fine-tune production output, so you can produce demanding color quality output or higher throughput. The standard inline finishing features a breadth of capabilities including dynamic cross perforation, linear perforation, automated job separation and servo-controlled precision cutting.

Get greater productivity, flexibility, and a competitive advantage with variable print modes:

- **Productivity Mode:** Gives you the top speed you need to meet job requirements. Prints at up to 328 feet per minute for 716 letter impressions per minute. Available as an option.
- **Performance Mode:** Provides an effective balance of print speed and quality. Prints at 246 feet per minute for 536 letter impressions per minute.
- **Quality Mode:** Provides wider color range and vibrancy to create high impact messaging. Prints at speeds of up to 164 feet per minute for 358 letter impressions per minute.

Greater throughput and registration accuracy with precision paper handling and data management.

- Streamline processes and reduce job set-up times
- A single roll of material can provide up to 1.7 hours of continuous run time in Performance Mode.
- Get up to 50,000 impressions from a single roll of material.
- Produce over 240,000 impressions per shift.
- Offer additional capabilities including optional full-bleed capability.
- Higher throughput with large capacity vertical stacker or optional offset stacker allows for continuous operation.



## The IntelliJet 20® HD Printing And Finishing System.

Web page: <https://www.bluecrestinc.com/products/printers/intelijet-print-solution/>

Video: <https://youtu.be/CStZ48kxXks>



The IntelliJet printing systems provides productivity and flexibility for higher volume operations. With the ability to print applications including critical communications, postcards and full gloss brochures, the IntelliJet20 is the reliable workhorse that produces high quality output. Create transactional statements/invoices and target client mailings that are compelling, targeted, and accurate using 100 percent variable data color print. You can add cross-sell offers, full-color graphics, and clear payment details on every document.

Produce high-impact variable communications with accuracy and precision.

- Process and transform all common Page Description Languages (PDLs) including AFP, Postscript and PDF
- Migrate and merge your existing applications
- Produce financial documents with secure, in-line MICR printing (optional)
- Optimize output for high-speed inserting and mailing

The IntelliJet crisp, high-quality output rivals offset printing, with leading inkjet technology and pigment inks that provide a wide color gamut and durable output across a variety of substrates.

- Produces high impact communications with up to 2400 nozzles per inch native resolution with High Definition Nozzle Architecture

- Nozzle redundancy maintains high print quality throughout long print runs
- True black ink provides superior optical density
- Durable output stands up to folding and inserting with no loss of quality

### The benchmark of production inkjet quality: HDNA

High Definition Nozzle Architecture (HDNA) is the award-winning inkjet printhead technology from our partner HP. By delivering up to 2400 nozzles per inch native resolution and providing support for dual drop weight per color, this printhead technology provides industry-leading print quality and performance for the BlueCrest IntelliJet 20 HD printing system family. Flexible print modes allow you to process fast to meet SLAs or in highest quality to expand your range of applications. These modes are detailed below for clarity.

### Quality Mode: Outstanding print output

Enjoy best-in-class print quality with to deliver image detail like never before with inkjet, resulting in a print output that is ideal for demanding transactional applications and more. Quality mode offers smoother transitions and color fills, enhanced shadow details, and more even skin tones.

- Up to 2400 nozzles per inch allow precise dot placement as well as redundancy to avoid white lines along the web.
- Dual drop weight allows smooth gradations and virtually grain-free images.
- Color Calibration and Quick Vision help monitor and maintain print quality throughout the run.
- Smoother color transitions with up to 7 levels of half-toning per color

Process color critical jobs that produce outstanding images on bills and statements, at up to 250 feet (76 meters) per minute.

### Performance HDK Mode: Unprecedented print quality, productivity & flexibility

Get higher quality output at a faster print speed. Performance HDK Mode leverages the dual drop weight of the HDNA technology in black to enhance image grain and shadow

detail. You'll gain greater control over operating expenses printing at faster speeds with higher quality output.

- Single drop weight in color using 1200 nozzles per inch native resolution.
- Dual drop weight in mono using 2400 nozzles per inch native resolution.
- Printing up to 152 meters per minute, both in mono and in color.

Performance HDK Mode allows you to meet tight production windows for even demanding color print jobs.

### Performance Mode: Gain productivity

Take on more jobs and still meet extremely tight SLAs, taking advantage of faster speeds of up to 500 feet (152 meters) per minute in mono and color in Performance Mode using 1200 nozzles per inch native resolution.

- Single drop weight reaching up to 152 meters per minute, both in mono and in color.
- Industry-leading nozzle redundancy (8x black, 4x color) maintains print quality throughout long runs

Performance Mode allows you to meet short production windows or increase capacity at peak times thanks to faster color print speeds made possible by HDNA technology.

### BlueCrest intelligent mail inserting

The predominance of mail in the United States is produced using BlueCrest inserting equipment. Our solutions scale from low volume producers with simple business application requirements up through the most complex solutions required by major mail production service bureaus. Government and educational institutions have very specific requirements for security and potentially tracking of the mail pieces and/or ballot through the production process and into the mail stream. BlueCrest high integrity solutions address these requirements at all customer production levels.

BlueCrest solutions are modular with the ability to change and add components to your system based on specific application needs. This modularity affords investment protection by enabling our customers to leverage funding over time to enhance the capability of their production facilities.

Examples of modularity and flexibility include:

- Inputs which can be sheet fed, continuous feed (via a roll input) or even no input at all with the ability to cycle at different speeds.
- The inserter chassis can be fitted with different style feeders complimented with cameras for one to one matching.
- Outputs are designed for both letters and flats, with the ability to add a postage meter, in line inkjet printing for the reply envelope or the outer envelope.
- Card attaching units suitable for DMV or other card applications,
- Booklet stitching a booklet,
- Metering, applying a live stamp, to a mailpiece

BlueCrest systems are built to meet many unique needs of today while protecting your investment with retrofit options for the future.

## High integrity processing – Critical in today's world

The **Direct Connect** operating system and Precision Inserter Control is the foundation of our security and monitoring controls.

The Direct Connect operating system provides essential integrity and flexibility features and ensures precision material control for simple and complex mail processing.

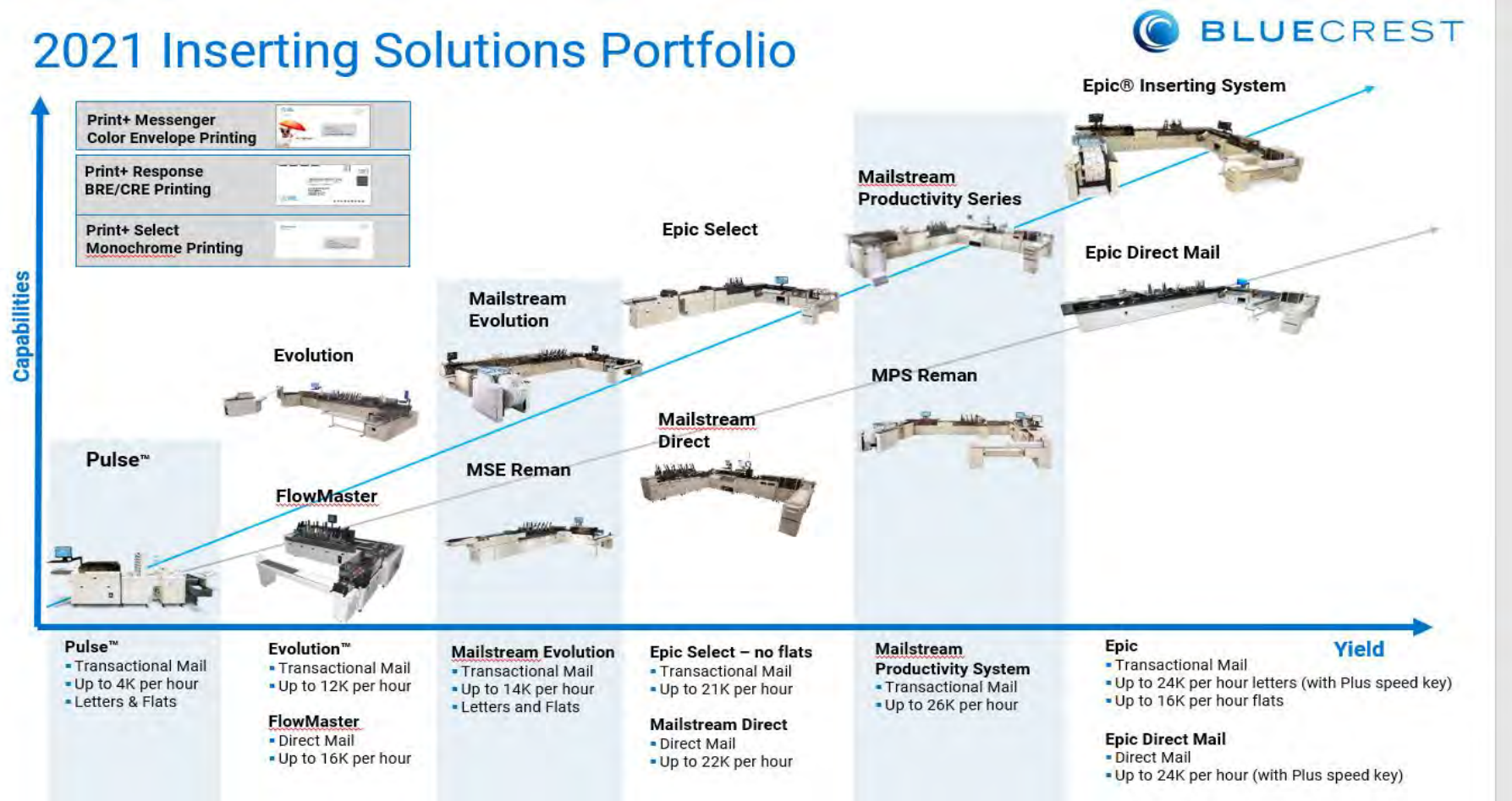
Direct Connect provides:

- Interactive, automated application setup and job management
- End to end integrated subsystem control and monitoring, with built-in diagnostics
- Multiple language support for operators
- Master Track Chassis Tracking is an integrated system control consisting of hardware and software elements that ensure mail pieces are tracked uniformly from start to finish. It provides the following benefits:
  - More than just “jam detect” photocells
  - Monitors exact paper motion
  - Knows where every piece of paper should be, and when it should (or should not) be there
  - Leading-edge to trailing-edge timing actually measures page and collation length
  - Improved ability to detect many potential problems before machine jams:
    - Missing or mutilated insert
    - Missing or mutilated collation
    - Improper fold
    - Skewed collation

## The BlueCrest Inserting Portfolio

Runs the full range from entry level low volume customers, such as smaller government agencies with cyclical or limited mailing requirements, to large complex government agencies with significant production such as centralized processing offices or revenue generating such as DMV and Finance. Increase mailpiece effectiveness by printing high quality, variable, full color text and images on envelopes, including business reply envelopes, inline with your mail inserter. Improve operational efficiency by eliminating preprinted envelopes, reducing storage needs, streamlining application changeover, and commingling mail. Make your mail work for you by increasing response rates with color text and graphics while adding a unique Intelligent Mail Barcode for complete end to end tracking in the mail stream.

An overview of each product is provided below. BlueCrest will work individually with each Equalis Member to determine the appropriate product based on a number of factors which include:



## Epic™ Inserting Solution

*High Speed, High Volume, Letters and Flats, automated changeover system*

Web page: <https://www.bluecrestinc.com/products/inserters/epic-inserting-solution/>

Video: <https://youtu.be/HyCQdVgTMfE>

The high speed, letters, and flats processing Epic Inserting Solution enables Equalis Members to increase operational productivity and lower cost of ownership to remain cost competitive while providing expanded processing capabilities to meet future capability requirements.

The innovative Epic Inserting System builds on proven platforms – combining our high productivity inputs, precision motion control and integrity tracking software with high speed, multi-format capabilities to provide mailers with a low-risk option to:

- Handle shorter runs more profitably
- Use automated steps to slash changeovers
- Switch quickly and easily between letters and flats
- Reduce labor costs while raising operator productivity
- Book greater yields and operational performance
- Simplify and manage capacity planning

This high speed, multi-format solution cost effectively processes complex valuable mail with demonstrated integrity and high yield to simplify capacity planning, increase operational productivity and lower total cost of ownership. High or low volume projects, when you need very flexible system that can consolidate workcells and produce mail fast, the Epic is a great solution.

## Mailstream Productivity Series™ (MPS)

*High speed, high volume letter system*

Web page: <https://www.bluecrestinc.com/products/inserters/mailstream-productivity-series/>

The BlueCrest Mailstream Productivity Series is an industry leading family of ultra-high-speed mail inserters. Its intelligent mail finishing systems redefines non-stop performance, running up to 26,000 mail pieces per hour with greater flexibility and integrity. The MPS will run 6x9 envelopes at 22,000 mail pieces per hour. Long runs such as tax bills, and state, county, or city mailings. When you have a lot of the same pieces that you need to get out the door quickly, the MPS can save the day.

- Handles long runs with standard material profitably
- High yields in short time frames
- Increase capacity of your operation

## Evolution™ Inserting System

*Handle simple to complex applications easily and accurately.*

Web page: <https://www.bluecrestinc.com/products/inserters/evolution-inserting-system>

Video: <https://youtu.be/-DtUfbI9-9M>

The Evolution processes letters and flats and is ideal for both mid and high-volume mailers who run high page count jobs, short-run jobs or need extra capacity during peak times, without sacrificing accuracy or integrity. The system is configurable to meet the needs of a government mailer, and offers a range of input, feeder and output options. Processing number 10 envelopes at 12,000 cycles per hour, 6x9 envelopes at 10,000 CPH and flats at 8,000 CPH.

- Scalable platform allows you to buy what you need today and add capabilities as your requirements evolve.
- When work changes often job setups and changeovers become repeatable and accurate
- The ergonomic configuration of the system provides the operator a smart, efficient workcell, with an increased mail piece output per square foot, allowing mailers to achieve higher SLAs.

## Mailstream Evolution (MSE)

*A versatile multi-format inserting platform capable of handling complex and custom applications.*

Web page: <https://www.bluecrestinc.com/products/inserters/mailstream-evolution>

Increasingly print and mail providers are pressured to manage the impact of declining volumes, rising postal costs and increasing consolidation while fluctuating market demands are making it more difficult to forecast projected mail volumes and application profiles. Increased competition is driving investments in production platforms that not only allow the processing of multi-format jobs but ensure the highest levels of processing integrity while achieving aggressive turnaround times.

- Process simple and complex runs more profitably
- Reduce labor costs while raising operator productivity
- Achieve greater yields and operational performance



## Rival™ Inserter

*An easy-to-use, compact, multi-format inserter for low-volume mailers, or mailers needing extra capacity on higher speed systems.*

Web page: <https://www.bluecrestinc.com/products/inserters/rival/>

Video: [https://youtu.be/h\\_yoYRpBFpl](https://youtu.be/h_yoYRpBFpl)

The Rival Productivity System delivers high performance capabilities in a small footprint design to help mail operations optimize the processing of letter and flat applications. Built on the best in class, proven BC Productivity Series mail finishing systems, this mail finishing solution provides a dependable, flexible, easy to use platform to meets your processing needs.

## The Pulse® Inserting system

*Low speed, low volume, unique work such as booklets or hand insertion, great for reprints and short runs*

Web page: <https://www.bluecrestinc.com/products/inserters/pulse/>

Video: <https://youtu.be/Zeb93jZkU9c>

The Pulse inserting system is a compact, multi-format platform ideal for short-run mailers who run many small jobs daily. Designed to deliver increased operational efficiency and greater flexibility at a reduced cost, the Pulse optimizes short-run processing while still supporting a variety of jobs. Its automated set-up and easy-to-use features save time and money on any short-run application.

Jobs paired to the right machines lead to better ROI and greater operational efficiency. The Pulse handles small- to medium-size mail jobs, including booklets, letters, and even large format flats, with the same accuracy and piece level tracking of a high-volume system, all at a fraction of the cost. The Pulse helps direct mail and transactional mailers reduce reliance on manual work, decreasing labor costs, and providing measurable ROI in less than a year.



# Inserters Innovations: Flexible platforms meet all your business needs

Process more application types | Get a stronger ROI | Reduce operating costs



### DM Infinity V2

- New, high-speed, high-volume inline meter base
- Operates at speeds up to 26,000 cycles per hour
- Approved by the U.S.P.S



### Business Reply Envelope Printer

- Ideal for dual side envelope printing
- Prints variable information and IMb tracking on envelope



### Outer envelope printing with PDF Workflow

- More functionality for existing document creation software that can support both CMYK and PDF
- Print full color envelope printing software, compatible with the Print+ Messenger



### Card Attaching –

- Multiple workflows available
- Eliminates off-line processes and consolidates workcells
- Meets requirements of both direct and transactional markets

BlueCrest innovations captured in the above diagram are representative of the modular capabilities which can be added to an inserting platform. This modularity in configuration allows cost conscious State, Local and Education customers to invest in a base platform with the ability to expand capabilities as requirements develop over time.

The DM Infinity V2 is the latest meter base for the Pitney Bowes Infinity Meter. It operates at speeds of up to 26,000 cycles per hour, as fast as the fastest BlueCrest inserter, enabling real time application of postage.

The Business Reply Envelope (BRE) printer enables customization of a response envelope to be included in the mailing. This can be utilized as part of a remittance process, for registration or forms return, as part of a sophisticated Vote By Mail deployment enabling tracking of an inbound completed ballot or many other uses.

The Print+ Messenger allows real time color printing on the outbound envelope for customization, messaging or mail piece tracking.

The Card attaching solution can be used for numerous purposes such as Motor Vehicle License distribution, prepaid card distribution for customers eligible for funding stipends, identity cards or many other potential use cases.

The most expensive part of any mailing is the postage. Utilizing work-sharing programs with the USPS by presenting your mail trayed up by zip codes with the proper paperwork can reduce your postage up to 30%. Different classes of mail and utilizing USPS incentives such as Informed Delivery, a service from the USPS that sends an email with a unique URL to the recipients home along with your physical mail, can reduce your postage even more.

Getting high volumes of all types and sizes of mail sorted – on time and cost-effectively – requires an ideal combination of processes and technology. The Vantage and Varisort solutions offer industry leading technology including piece-level tracking, double mailpiece detection and best-in-class OCR technology to help you automate more, saving time and lowering costs.

# Letters and Flats Sortation Portfolio- great way to reduce hard dollar postage costs

Sort more types of mail faster for cost and operational savings



## Vantage™ Sorting Solution

- Sorts letters outgoing or incoming applications
- Highest productivity sorting up to 50K per hour
- Modular design can include OCR, WABCR and scale
- Global market application interfaces
- Vote-by-Mail ReliaVote Platform



## Vantage™ Mixed Mail Stacker

- Sorts more types of mail on a single platform
- Gain productivity sorting letter 50K per hour and flats up to 36K per hour
- Process postcards, letters and flats up to 10mm
- Modular design can include OCR, WABCR and scale
- Vote-by-Mail ReliaVote Platform



## VariSort™ Sorting Solution

- Sorts wide mail spectrum up to 8K per hour at 50mm
- Modular design can include OCR, WABCR, scale, labeler
- China Mail processing capability
- Process polywrap, misshapen pieces, small parcels

### SortEngine™ 360



### Powered by SortEngine™ 360 Software

- **Applications:** Postal Software platform for multiple applications
- **Interface & connectivity** to various client back-ends
- **Data Modules** capable to OCR, Scheme, multi-site system and site connection
- **Data Management** features address learning system and flexible sw for business rules
- **Safety and Control** for encrypted data communication, system health coms and GDPR adherence

## BlueCrest Sorting Solutions

### The Vantage™ with FlexLine Stacker Technology

<https://www.bluecrestinc.com/products/sorters/vantage-sorting-solution/>

BlueCrest sorting systems are modular, flexible, and customizable for processes such as outbound processing for postage savings sortation, to in-bound sorting for building distribution, lockbox, surveys or census type mailings. Leveraging our SortEngine™ 360 software, the Vantage Sorter combines speed, flexibility intelligence and durability to achieve consistent overall throughput.

#### Benefits

- Sort mail fast with a platform capable of running 50,000 pieces per hour
- Meet strict submission requirements by tracking individual mail pieces all the way to each pocket with exclusive positive piece-level tracking
- Eliminate the possibility of doubles with a mail double detection device featuring integrated optical view
- Capitalize on mail processing efficiency and revenue generation with enhanced read capability via best-in-class OCR technology
- Avoid incremental labor for reprocessing un-readable mail.

### The Vantage™ with Mixed Mail Stacker Technology

The Mixed Mail Stacker (MMS) feature for the Vantage™ product line is the latest enhancement to the BlueCrest flagship sorting solution. The mixed mail stacking technology enables the processing of thicker mail and a range of sizes **from postcards to business flats**. Flexibility, as well as readability and system uptime, is key to increased productivity, efficiency and cost savings.

#### Benefits

- The Vantage™ MMS is flexible, modular and easy to operate
- Sorts a variety of mail characteristics, from simple to complex letters and flats
- Provides customers the ability to configure sorting solutions based on mail volume and space availability
- Offers production integrity, optimum work-flow management and ease of operability
- Maximizes operational throughput without having the need for multiple islands of technology

We have extensive experience in sorting letters, flats, small parcels, large parcels, inbound or outbound, measurement capture, customized carrier rate shopping, and many manual steps that are typically performed along the way, can be automated with full audit and reporting. Business cases to reduce labor and create a reliable updated system become easy to write.



## Parcel Sortation

# Parcel Sortation Portfolio

Parcel and data capture solutions for evolving e-Commerce business needs



## OneSort® Prime

- Basic work desk solution to help manage growing parcel volume
- Sorts up to 1,000 pph eliminating manual sorting
- WABCR
- Push Data via API
- Certified Dimension
- Optional Certified Scale
- Optional Labeling



## OneSort® Pro

- Full featured solution for growing volumes of parcels
- Sorts up to 1,000 pph
- OCR & WABCR
- Push Data via API
- Certified Dimension and scale
- Labeling
- Adjustable work table
- Integrated with mail piece tracking



## TrueSort™ Prime

- Sort up to 3000 pph
- OCR to record address
- Capture dimensions
- Scale records weight
- Semi-Auto operation
- Process multiple Parcel class types
- Sort to tray or stack
- **LAUNCHING IN Q2**



## TrueSort™ Pro

- Fully Automated Parcel Sorter solutions up to 24,000pph
- Bomb Bay
- Cross Belt
- Integrated Dimension Weigh Scan System(S)
- Configurable to client applications

### SortEngine™ 360



### Powered by SortEngine™ 360 Software

- **Applications:** Postal Software platform for multiple applications
- **Interface & connectivity** to various client back-ends
- **Data Modules** capable to OCR, Scheme, multi-site system and site connection
- **Data Management** features address learning system and flexible sw for business rules
- **Safety and Control** for encrypted data communication, system health coms and GDPR adherence

## BlueCrest Leading Service and Maintenance Options

### BlueCrest Global Service

Our service organization is the world's most trusted advisor to print and mail operations. We remain on the cutting edge of technology innovation and have a suite of solutions that extends across the full end-to-end document lifecycle as well as the world's leading data analytics platforms. Our service technicians and support specialists offer an unmatched level of consultative and collaborative support. Our flexible service level agreements are designed to provide operations of any size with the most comprehensive coverage and support. We offer a range of engagement options for customers who are either looking for the right fit or for a single point of service contact. At BlueCrest, we have the most experienced technicians and specialists in the industry to help you improve productivity, increase ROI, eliminate potential risks and meet the most demanding SLAs.

### Solution Engineering

Improve and grow by optimizing your technology, people and processes. Every business is unique and has an opportunity to improve. Our expert solutions engineers will work with you to define your business challenges, analyze your end-to-end workflow and identify key areas of improvement that can deliver a positive outcome for your operation. We support you in generating value from your investments, faster, and ensure you are utilizing your production environment to its fullest potential. The BlueCrest Solution Engineering team change the way businesses think about the value of their mail operations. A Solution Engineering engagement is an ideal opportunity for businesses that want to document their workflows for the first time, or those that want to find gaps in their end-to-end processes. We help you achieve higher throughput to consistently surpass customer SLAs, lower production costs to run a more efficient operation, or develop operator training and workflow processes to deliver consistently strong results.

### Training & Education

Businesses run smoother when operators are properly trained. Our training, coaching, and mentorship is designed to help your team master the operational and implementation skills needed to receive the greatest return on your investment. We offer a range of world class training and education programs, at a variety of different levels to increase operator and machine productivity. Properly trained operators have higher machine run-times, strive for continuous improvement, have a greater impact on your business, and stay longer.

### Protect

In today's world, protecting your current investments is critical to the success of your business. Help make sure your critical production assets are safe from security vulnerability with our BlueCrest Protect offering. If you have BlueCrest-supplied inserters, workstations, and servers, the Protect offering is one you will want to consider. BlueCrest Protect is an annual subscription for active BlueCrest customers to deliver specific qualified & approved security software patching. Get regular updates, emergency updates, report outs on applied updates, and most important – peace of mind that your assets are protected from the unexpected.

## Best of Class solutions by application samples

### Vote-by-Mail Introduction

Vote-by-Mail and absentee ballots volumes reached historic levels during the 2020 general election, and elections officials had to grapple with the unprecedented challenges that this exponential increase created. At times, the only answer was through massive increases in manual labor processing and corresponding cost to accommodate the increase given the relatively short response window. However, technology solutions are available to enable elections organizations to respond to what is expected to be a continuing increase in the demand for Vote by Mail / Absentee ballot requirements with the highest levels of security and tracking.

For over 16 years, BlueCrest has been helping election officials process ballots by mail securely and accurately. Our Relia-Vote™ solutions improve the end-to-end print and mail workflow using proven technology and process automation. BlueCrest solutions enable officials to maintain integrity and security throughout the mail ballot process, to help ensure the right ballot is going to the right voter, as well as completed ballots returned properly. Election organizations can improve ballot security, integrity, and accuracy by leveraging a one-to-one ballot preparation process to ensure integrity and provide an audit trail. It is imperative that these solutions securely interface with local Voter Registration Systems. With this preparation in place an election organization can then drive production automation and accuracy of ballot production leveraging BlueCrest high integrity file-based processing. By assigning and leveraging the USPS® Intelligent Mail barcode (IMb) to enable chain-of custody and tracking of mail ballot delivery and completed ballots returned, provides for greater security and transparency. Ultimately this security and data-based tracking improves the voter experience, voter participation, and reporting. The ability to update the Voter Registration System allows municipalities to indicate the ballot was received to avoid any duplication and the risk of potential fraud. Leveraging standard USPS capabilities allows jurisdictions to perform address quality enhancements include CASS, PAVE and report discrepancies including tracking and reporting mailing exceptions such as undeliverable or forwarded mail. BlueCrest provides these integrated solutions for end to end Ballot production and processing through a series of products which can be deployed separately for discrete functionality or as a complete highly secure solution set.

### Relia-Vote™ Solution Overview

Web page: <https://www.bluecrestinc.com/solutions/vote-by-mail-relia-vote/>

Video: <https://youtu.be/Zk-7V4ghic>

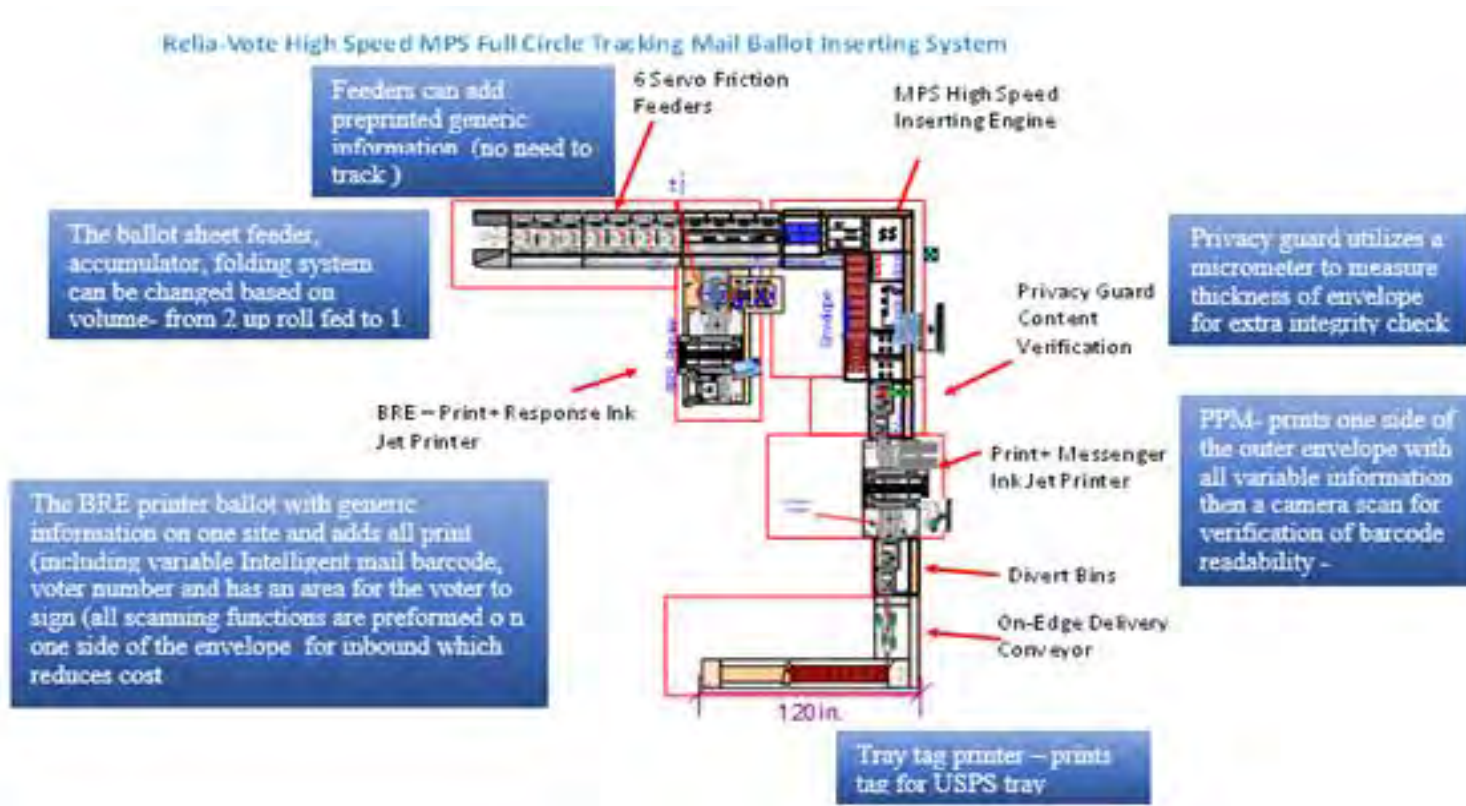
- Relia-Vote™ Ballot Management Software:
- Ballot Printing: (IntelliJet20 Full Color Printer, Accelejet and EvoluJet) Continuous Roll Feed or Cut Sheet ballot printing and sample booklet printing capability.
- File Prep Software: absorb voter files to prepare for the first step of automating the outbound mail ballot process and achieving USPS postal discounts and tracking.
- Inserting Systems (Evolution, MPS, MSE Inserters): Validate ballot type, assemble, insert, content verification, personalize, final verification and complete mail ballot packets with high integrity closed loop processing.

- Sorting Systems (Vantage 24K & Vantage 50K sorters): Outbound mail ballot validation, imaging, USPS sorting for postal discounts - and inbound mail ballot validation, imaging, signature verification, auditing, opening and sorting.

### Relia-Vote™ Ballot Management Software

Relia-Vote Ballot Management software is designed to provide election officials with a secure and effective way to prepare high volumes of ballot mailing, monitoring, and tracking ballots to voters, and validate and record receipt of the completed ballot. Relia-Vote™ Ballot Management Software enables one-to-one ballot validation by integrating all these critical processes for mail ballot management including ballot preparation, assembly, delivery, authentication, and reporting. The result is greater data accuracy, assembly integrity, chain-of-custody/visibility, ballot verification and reporting back to the Voter Registration Database. This software - configurable as a cloud-based software solution or installed on-premise - can help make every aspect of your mail ballot operation more powerful, flexible, and accurate no matter how many ballots you process. And, it can be easily deployed remotely.

### Relia-Vote™ Inserting Systems





## Relia-Vote Sorting Systems

The BlueCrest Vantage Inbound/Outbound Mail Ballot Sorting solution provides ballot validation, signature presence, sorting, time/date stamp and envelope opening – all on one streamlined scalable system. BlueCrest Business Logic Processing and **SortEngine 360™** software power the Vantage mail sorting system. Featuring FlexLine™ stackers, the system combines speed, intelligence and endurance.

## The Vantage

*Automate mail sorting with greater throughput*

Web page: <https://www.bluecrestinc.com/products/sorters/vantage-sorting-solution/>

Video: <https://www.youtube.com/watch?v=dCP9zgHGjZ8&t=15s>

The Vantage sorting solution provides the highest overall operational throughput and integrity in the industry, with speeds scaling from 24,000 per hour, to up to 50,000 per hour, thus addressing the needs of organizations who process low to high ballot volumes. This solution improves sorting consistency and reduces downtime by:

- Tracking individual ballot packets throughout the overall process
- Eliminating the possibility of doubles and non-ballot packets
- Capitalizing on mail processing efficiency and revenue

The modular design is highly scalable for low to large volume jurisdictions.

**The Vantage sorting system's advanced capabilities will enable elections officials to:**

- Meet strict submission requirements by tracking individual ballot packets all the way to each pocket with exclusive positive piece-level tracking from BlueCrest
- Virtually eliminate the possibility of doubles with a double detection device featuring integrated optical view
- Capitalize on mail processing efficiency and revenue generation with enhanced read capability via best-in-class barcode scanning technology
- Avoid incremental labor for reprocessing unreadable mail. That saves time and reduces expenses
- 15-year life expectancy which no other vendor offers

The Vantage sorting system gives you the freedom to design a system that meets the specific needs of your organization. Right size a combination of pockets and integrated tray racks using two, three, or four tier pockets in a single-sided or double-sided footprint. The BlueCrest Vantage sorting solution helps you increase efficiency by automating more processes with consistently high throughput and valuable ballot packet data capture capabilities. With the Vantage sorter, you have a powerful, scalable solution with the flexibility to meet your unique sorting needs, today and in the future.

The Vantage sorter combines speed, intelligence and endurance to achieve consistent high overall throughput. Each individual part was chosen for maximum performance and durability, delivering operation that is more consistent and less downtime. Innovative feeder technology lets you sort ballot packets with a variety of thickness while maintaining a consistently high throughput speed.

A sophisticated camera assembly provides superior mail image stability. The camera assembly utilizes an on-board camera lighting airburst blowing system, which eliminates mail dust build-up for a clean image area for consistent high-level barcode read rates day in and day out.

**Separator Card Detection** is included and supports precinct, district or group sorting requirements.

**The Thermal Transfer Label Kit Printer** will recreate damaged barcodes on incoming vote-by-mail ballots. The printer will print a barcode on a label that can be placed over any damaged barcodes for scanning on the Relia-Vote system. This would eliminate the need for manual ballot package reconciliation.

**Optical Double Feed Detector** is included and uses a PC-based device that utilizes a specialized USB camera system to identify double fed envelopes, where two items meant to be mailed separately are placed in one envelope. The camera is a line scan device designed with two viewing regions. The camera focuses on the bottom edge of the ballot envelope where it illuminates the target using white lighting. The lower 20-30mm of the ballot envelope address face is viewed using an infrared lighting spectrum. The side view provides useful information to help identify special piece types. The combination of the two views provides a great deal more data about the ballot envelope, providing a higher level of accuracy. This additional detector will ensure 100% verification that they system will never double feed two ballot envelopes.

**No Signature Detection** (an Optional Feature) This feature will detect the presence or absence of a signature on the initial scan pass and automatically outsort identified ballot envelopes with no signatures to a challenge sort pocket.

**Check Box Detection** (Optional Feature) This feature will detect for the presence or absence of a check mark in a box and sort the ballot envelopes according to the selected sort criteria; however, if the information is in the voter file, the system can use the data in the file to drive sorting decisions.

**Selective Envelope Opener Module** (Optional Feature) The Selective Envelope Opener is a module and associated software that will allow the operator to setup the sorting system to selectively open the return ballot envelopes while the ballot envelopes are being processed based on rules within the legal timeframe. This feature is flexible so that it can also be setup to open “all” ballot envelopes in a batch process as a simple “high speed” opener as well.

The Vantage enables elections officials to incorporate the right combination of components to meet current inbound and outbound voting requirements with an eye towards scalability and future growth as additional capabilities can be added into a base system as requirements increase.

## Lockbox Sorting Solutions

The Vantage™ Lockbox Mail Sorting Solution gives you unparalleled handling and sorting of all your remittance mail – at processing speeds up to 50,000 pieces per hour. Now you can enhance productivity and save time and money with automated lockbox processing for the most efficient processing of valuable incoming payments.

It's the ultimate in processing power with the Vantage Lockbox Mail Sorting Solution you can speed the flow of incoming payments and renewals with industry leading OCR technology that reads PO Box numbers, Vanity Addresses, ZIP + 4®, IMb® barcodes, Departments, Company Names – or your own individual requirements. And, our SortEngine 360 OCR integration can even recognize, and sort remittance mail addressed by hand.

### Maximize productivity and cost savings

With BlueCrest exclusive automated database generation software, you'll maximize savings by eliminating burdensome manual database maintenance. And, by intelligently using customer-supplied database constraints, you'll automate the optimization of your sort plans and minimize the number of passes needed to sort your mail. You can even ensure that high-value payments are out-sorted on the first pass. And, there's no limit to the number of sort destinations.

### Local Video Encoding sorts more mail

And here's something else that will make life easier: our Local Video Encoding (LVE) processes non-OCR readable mail, enabling virtually 100 percent of your mail to be sorted in just two passes. Our exclusive Time-Slip™ keying technology maximizes operator processing efficiency and eliminates the need for a costly separate manual mail processing operation. Additionally, it allows all mail processing data to be available electronically in a central location which significantly increases the accuracy of processing metrics.

## ATTACHMENT C: REQUIRED BIDDER INFORMATION & CERTIFICATIONS

**Purpose of this Attachment C:** CCOG requires the following information about Bidders who submit proposals in response to any CCOG request for proposal (“RFP”) in order to facilitate the execution of the master group purchasing agreement (“Master Agreement”) with the winning supplier (“Winning Supplier”). CCOG reserves the right to reject a Bidder’s proposal if a Bidder fails to provide this information fully, accurately, and by the deadline set by CCOG in RFP Section 1.3 – Anticipated Procurement Timetable. Further, some of this information (as identified below) **must** be provided in order for CCOG to accept and consider a Bidder’s proposal. **Failure to provide such required information may result in a Bidder’s proposal being deemed nonresponsive to this RFP.**

**Instructions:** provide the following information about the Bidder. Bidders 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) complete this document using the form fields, print to .pdf, and provide certified electronic signatures in the designated signature areas, or c) print this attachment, complete it, and sign it in the designated signature areas. It is mandatory that the information provided is certified with an original signature (in [blue ink](#), please) or signed using a certified electronic signature by a person with sufficient authority and/or authorization to represent Bidder. Bidders are to provide the completed and signed information and certifications to CCOG as described in RFP Section 4.2 – Format for Organization of the Proposal.

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

**Bidders must provide all the information outlined below.**

<p><b>1. Equalis Group RFP Name:</b></p> <p><u><i>RFP COG-2112, Document Management, Mail, and Election Equipment with Related Services</i></u></p>	<p><b>2. Proposal Due Date:</b></p> <p><u><i>March 4, 2021</i></u></p>
<p><b>3. Bidder Name:</b></p> <p><u>DMT Solutions Global Corporation d/b/a BlueCrest</u> <i>(legal name of the entity responding to RFP)</i></p>	<p><b>4. Bidder Federal Tax ID # or Social Security #:</b></p> <p><u><i>82-5520529</i></u></p>
<p><b>5. Bidder Corporate Address:</b></p> <p>DMT Solutions Global Corporation d/b/a BlueCrest 37 Executive Drive, Danbury, CT 06810</p>	<p><b>6. Bidder Remittance Address</b> <i>(or "same" if same as Item #5):</i></p> <p><b>BLUECREST INC-CNF</b> PO BOX 74007412 CHICAGO IL 60674 A/R Remittance: <a href="mailto:ar-remittance@bluecrestinc.com">ar-remittance@bluecrestinc.com</a></p>

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

**Bidder Representative:** *Susan Gabrielsen*

**Representative's Title:** *S.V.P. North America Sales*

**Address 1:** *37 Executive Drive*

**Address 2:** *Street Address 2*

**City, State Zip:** *Danbury, CT 06810*

**Phone #:** *475-204-3068*

**Fax #:** *Fax #.*

**E-Mail Address:** [susan.gabrielsen@bluecrestinc.com](mailto:susan.gabrielsen@bluecrestinc.com)

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**8. Print or type the name of the Bidder representative authorized to address contractual issues, including the authority to execute a contract on behalf of Bidder, 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):**

**Bidder Representative:** *Susan Gabrielsen*

**Representative's Title:** *S.V.P. North America Sales*

**Address 1:** *Same*

**Address 2:** *Street Address 2*

City, State Zip: City, State Zip

Phone #: 914-262-3456

Fax #: Fax #.

E-Mail Address: Susan.Gabrielsen@BlueCrestinc.com

9. Is this Bidder an Ohio certified Minority Business Enterprise (“MBE”)? Yes  No

If yes, attach a copy of current certification to your proposal as an appendix in the third section of your proposal.

**10. Mandatory Supplier Certifications:**

CCOG 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. Bidders responding to any CCOG 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 Bidder’s proposal being deemed nonresponsive to this RFP.**

I, \_\_\_\_\_ (insert *signature* of representative shown in Item #7 above), hereby certify and affirm that DMT Solutions Global Corporation d/b/a BlueCrest, 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 DMT Solutions Global Corporation d/b/a BlueCrest, 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 DMT Solutions Global Corporation d/b/a BlueCrest, 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 DMT Solutions Global Corporation d/b/a BlueCrest, 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 CCOG.

**11. Supplemental Bidder Contract and Equal Employment Opportunity Information:**

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

	<u>Nationwide:</u>	<u>Ohio Offices:</u>
Total Number of Employees:	<u>830</u>	<u>63</u>
% of those who are Women:	<u>9.16%</u>	<u>3.17%</u>
% of those who are Minorities:	<u>28.19%</u>	<u>11.11%</u>

B. If you are selected as the Winning Supplier and this RFP involves the provision of services to Equalis Group 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: N/A  
Street Address 1: Street Address 1  
Street Address 2: Street Address 2  
City, State Zip: City, State Zip  
Work to be Performed: \_\_\_\_\_ Description of Work

Estimated percentage of total proposal to be performed by subcontractors: 0.00 %  
(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): N/A

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

12. Bidder has reviewed the Model Master Agreement attached to the RFP as Attachment E, and if awarded a contract,  Bidder will not (or)  Bidder will request changes to the standard language and has marked the requested changes and returned the model document with this proposal for consideration



by CCOG and Equalis Group, LLC. (All requested changes to Model Master Agreement contract language are subject to negotiation and CCOG and Equalis Group, LLC approval.)

13. Bidder has reviewed the Model Administration Agreement attached to the RFP as **Attachment E**, and if awarded a contract,  Bidder will not (or)  Bidder will request changes to the standard language and has marked the requested changes and returned the model document with this proposal for consideration by Equalis Group, LLC. (All requested changes to Model Administration Agreement contract language are subject to negotiation and Equalis Group, LLC approval.)

14. I \_\_\_\_\_, (insert signature of representative shown in Item #7 above) hereby affirm that this proposal accurately represents the capabilities and qualifications of DMT Solutions Global Corporation d/b/a BlueCrest, and I hereby affirm that the cost(s) proposed to CCOG for the performance of services and/or provision of goods covered in this proposal in response to this CCOG 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.)

**15. Additional Documents:**

CCOG makes every attempt to meet the varying legal requirements of public agencies across the country. The documents included in this section are intended to give our contracts the broadest geographic reach by meeting the procurement requirements of other states outside of Ohio.

**15.1. Lobbying Certification**

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

The undersigned certifies, to the best of his/her knowledge and belief, on behalf of Bidder that:

1. No Federal appropriated funds have been paid or will be paid on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding one hundred thousand dollars (\$100,000) in Federal funds at all appropriate tiers and that all sub-recipients shall certify and disclose accordingly.

\_\_\_\_\_  
Signature of Bidder representative

### 15.2. Boycott Certification

Bidder must certify that during the term of any Agreement, it does not boycott Israel and will not boycott Israel. “Boycott” means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli-controlled territory, but does not include an action made for ordinary business purposes.

\_\_\_\_\_  
Signature of Bidder representative

### 15.3. Federal Funds Certification Form (EDGAR)

When a participating agency seeks to procure goods and services using funds under a federal grant or contract, specific federal laws, regulations, and requirements may apply in addition to those under state law. This includes, but is not limited to, the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 CFR 200 (sometimes referred to as the “Uniform Guidance” or “EDGAR” requirements). All bidders submitting proposals must complete this Federal Funds Certification Form regarding bidder’s willingness and ability to comply with certain requirements which may be applicable to specific participating agency purchases using federal grant funds. This completed form will be made available to Members for their use while considering their purchasing options when using federal grant funds. Members may also require Supplier Partners to enter into ancillary agreements, in addition to the contract’s general terms and conditions, to address the member’s specific contractual needs, including contract requirements for a procurement using federal grants or contracts.

**For each of the items below, respondent should certify bidder’s agreement and ability to comply, where applicable, by having respondents authorized representative complete and initial the applicable lines after each section and sign the acknowledgment at the end of this form.** If a respondent fails to complete any item in this form, CCOG will consider the respondent’s response to be that they are unable or unwilling to comply. A negative response to any of the items may, if applicable, impact the ability of a participating agency to purchase from the Supplier Partner using federal funds.

#### 15.3.1. Supplier Partner Violation or Breach of Contract Terms

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

Any contract award will be subject to Terms and Conditions of the Master Agreement, as well as any additional terms and conditions in any purchase order, participating agency ancillary contract, or Member construction contract agreed upon by Supplier Partner and the participating agency which must be consistent with and protect the participating agency at least to the same extent as the CCOG Terms and Conditions.

The remedies under the contract are in addition to any other remedies that may be available under law or in equity. By submitting a proposal, you agree to these Supplier Partner violation and breach of contract terms.

Does Supplier Partner agree? *SG*

(Initials of Authorized Representative)

### 15.3.2. Termination for Cause or Convenience

When a participating agency expends federal funds, the participating agency reserves the right to immediately terminate any agreement in excess of ten thousand dollars (\$10,000) resulting from this procurement process in the event of a breach or default of the agreement by Offeror in the event Offeror fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, contract, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the contract and/or the procurement solicitation. Participating agency also reserves the right to terminate the contract immediately, with written notice to offeror, for convenience, if participating agency believes, in its sole discretion that it is in the best interest of participating agency to do so. Bidder will be compensated for work performed and accepted and goods accepted by participating agency as of the termination date if the contract is terminated for convenience of participating agency. Any award under this procurement process is not exclusive and participating agency reserves the right to purchase goods and services from other offerors when it is in participating agency's best interest.

Does Supplier Partner agree? *SQ*

(Initials of Authorized Representative)

### 15.3.3. Equal Employment Opportunity

Except as otherwise provided under 41 CFR Part 60, all participating agency purchases or contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 shall be deemed to include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 CFR Part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

The equal opportunity clause provided under 41 CFR 60-1.4(b) is hereby incorporated by reference. Supplier Partner agrees that such provision applies to any participating agency purchase or contract that meets the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 and Supplier Partner agrees that it shall comply with such provision.

Does Supplier Partner agree? *SQ*

(Initials of Authorized Representative)

### 15.3.4. Davis-Bacon Act

When required by Federal program legislation, Supplier Partner agrees that, for all participating agency prime construction contracts/purchases in excess of two thousand dollars (\$2,000), Supplier Partner shall comply with the Davis-Bacon Act (40 USC 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, Supplier Partner is required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, Supplier Partner shall pay wages not less than once a week.

Current prevailing wage determinations issued by the Department of Labor are available at [www.wdol.gov](http://www.wdol.gov). Supplier Partner agrees that, for any purchase to which this requirement applies, the award of the purchase to the Supplier Partner is conditioned upon Supplier Partner's acceptance of the wage determination.

Supplier Partner further agrees that it shall also comply with the Copeland “Anti-Kickback” Act (40 USC 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”. The Act provides that each Supplier Partner or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled.

Does Supplier Partner agree? *SG*

(Initials of Authorized Representative)

#### **15.3.5. Contract Work Hours and Safety Standards Act**

Where applicable, for all participating agency contracts or purchases in excess of one hundred thousand dollars (\$100,000) that involve the employment of mechanics or laborers, Supplier Partner agrees to comply with 40 USC 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 USC 3702 of the Act, Supplier Partner is required to compute the wages of every mechanic and laborer on the basis of a standard work week of forty (40) hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of forty (40) hours in the work week. The requirements of 40 USC 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

Does Supplier Partner agree? *SG*

(Initials of Authorized Representative)

#### **15.3.6. Right to Inventions Made Under a Contract or Agreement**

If the participating agency’s Federal award meets the definition of “funding agreement” under 37 CFR 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance or experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency.

Supplier Partner agrees to comply with the above requirements when applicable.

Does Supplier Partner agree? *SG*

(Initials of Authorized Representative)

#### **15.3.7. Clean Air Act and Federal Water Pollution Control Act**

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

When required, Supplier Partner agrees to comply with all applicable standards, orders, or regulations issued pursuant to the Clean Air Act and the Federal Water Pollution Control Act.

Does Supplier Partner agree? *SG*

(Initials of Authorized Representative)

#### **15.3.8. Debarment and Suspension**

Debarment and Suspension (Executive Orders 12549 and 12689) – A contract award (see 2 CFR 180.220) must not be made to parties listed on the government-wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR Part 1966 Comp. p. 189) and 12689 (3CFR Part 1989 Comp. p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

Supplier Partner certifies that Supplier Partner is not currently listed on the government-wide exclusions in SAM, is not debarred, suspended, or otherwise excluded by agencies or declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier Partner further agrees to immediately notify the Cooperative and all Members with pending purchases or seeking to purchase from Supplier Partner if Supplier Partner is later listed on the government-wide exclusions in SAM, or is debarred, suspended, or otherwise excluded by agencies or declared ineligible under statutory or regulatory authority other than Executive Order 12549.

Does Supplier Partner agree? *SG*

(Initials of Authorized Representative)

#### **15.3.9. Byrd Anti-Lobbying Amendment**

Byrd Anti-Lobbying Amendment (31 USC 1352) – Supplier Partners that apply or bid for an award exceeding one hundred thousand dollars (\$100,000) must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 USC 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award. As applicable, Supplier Partner agrees to file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 USC 1352).

Does Supplier Partner agree? *SG*

(Initials of Authorized Representative)

#### **15.3.10. Procurement of Recovered Materials**

For participating agency purchases utilizing Federal funds, Supplier Partner agrees to comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act where applicable and provide such information and certifications as a participating agency may require to confirm estimates and otherwise comply. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds ten thousand dollars (\$10,000) or the value of the quantity acquired during the preceding fiscal year exceeded ten thousand dollars (\$10,000); procuring solid waste management services in a manner

that maximizes energy and resource recovery, and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Does Supplier Partner agree? SG

(Initials of Authorized Representative)

**15.3.11. Profit as a Separate Element of Price**

For purchases using federal funds in excess of one hundred fifty thousand dollars (\$150,000), a participating agency may be required to negotiate profit as a separate element of the price. See, 2 CFR 200.323(b). When required by a participating agency, Supplier Partner agrees to provide information and negotiate with the participating agency regarding profit as a separate element of the price for a particular purchase. However, Supplier Partner agrees that the total price, including profit, charged by Supplier Partner to the participating agency shall not exceed the awarded pricing, including any applicable discount, under Supplier Partner's Group Purchasing Agreement.

Does Supplier Partner agree? SG

(Initials of Authorized Representative)

**15.3.12. General Compliance and Cooperation with Members**

In addition to the foregoing specific requirements, Supplier Partner agrees, in accepting any purchase order from a Member, it shall make a good faith effort to work with Members to provide such information and to satisfy such requirements as may apply to a particular participating agency purchase or purchases including, but not limited to, applicable recordkeeping and record retention requirements.

Does Supplier Partner agree? SG

(Initials of Authorized Representative)

**15.3.13. Applicability to Subcontractors**

Offeror agrees that all contracts it awards pursuant to the Contract shall be bound by the foregoing terms and conditions.

Does Supplier Partner agree? SG

(Initials of Authorized Representative)

By signature below, I certify that the information in this form is true, complete, and accurate and that I am authorized by my company to make this certification and all consents and agreements contained herein.

**DMT Solutions Global Corporation dba BlueCrest**

**Bidder Name**

---

**Signature of Authorized Company Official**

**Susan Gabrielsen**

**Printed Name**

**SVP Sales North America**

**Title**

**3/18/2021**

**Date**



**16. Required Documents for Supplier Partners Intending to Do Business in New Jersey**

**16.1. Ownership Disclosure Form**

Pursuant to the requirements of P.L. 1999, Chapter 440 effective April 17, 2000 (Local Public Contracts Law), Bidder shall complete the form attached to these specifications listing the persons owning 10 percent (10%) or more of the firm presenting the proposal.

**Bidder Name:** Click or tap here to enter text.

**Street Address:**

**City, State Zip:** Click or tap here to enter text.

**Complete as appropriate:**

*I Click or tap here to enter text., certify that I am the sole owner of Click or tap here to enter text., that there are no partners and the business is not incorporated, and the provisions of N.J.S. 52:25-24.2 do not apply.*

**OR:**

*I Click or tap here to enter text., a partner in Click or tap here to enter text., do hereby certify that the following is a list of all individual partners who own a 10 percent (10%) or greater interest therein. I further certify that if one (1) or more of the partners is itself a corporation or partnership, there is also set forth the names and addresses of the stockholders holding 10 percent (10%) or more of that corporation's stock or the individual partners owning 10% or greater interest in that partnership.*

**OR:**

*I **Susan Gabrielsen**, an authorized representative of **DMT Solutions Global Corporation d/b/a BlueCrest**, a corporation, do hereby certify that the following is a list of the names and addresses of all stockholders in the corporation who own 10% or more of its stock of any class. I further certify that if one (1) or more of such stockholders is itself a corporation or partnership, that there is also set forth the names and addresses of the stockholders holding 10 percent (10%) or more of the corporation's stock or the individual partners owning a 10 percent (10%) or greater interest in that partnership.*

**(Note: If there are no partners or stockholders owning 10% or more interest, indicate none.)**

NAME	ADDRESS	% INTEREST
Stark Intermediate Holding Corporation	c/o Platinum Equity Advisors, LLC 360 North Crescent Drive South Building, Beverly Hills, CA 90210	100%
Click or tap here to enter text.	Click or tap here to enter text.	
Click or tap here to enter text.	Click or tap here to enter text.	
Click or tap here to enter text.	Click or tap here to enter text.	
Click or tap here to enter text.	Click or tap here to enter text.	

I further certify that the statements and information contained herein, are complete and correct to the best of my knowledge and belief.

\_\_\_\_\_  
**Authorized Signature and Title**

**3/18/2021**  
**Date**

**16.2. (TEMPLATE) Non-Collusion Affidavit (to be completed and included with each proposal submitted to Members in NJ)**

**Bidder Name:** Click or tap here to enter text.

**Street Address:** Enter Street Address

**City, State Zip:** Enter City, State Zip

State of New Jersey

County of Customer County

*I, Your Name of the Your City in the County of Your County, State of Your State of full age, being duly sworn according to law on my oath depose and say that:*

*I am the Your Title of the firm of Bidder Name, the Bidder making the proposal for the goods, services, or public work specified under the attached proposal, and that I executed the said proposal with full authority to do so; that said respondent has not directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive bidding in connection with the above proposal, and that all statements contained in said bid proposal and in this affidavit are true and correct, and made with full knowledge that the Customer Name relies upon the truth of the statements contained in said bid proposal and in the statements contained in this affidavit in awarding the contract for the said goods, services, or public work.*

*I further warrant that no person or selling agency has been employed or retained to solicit or secure such contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by:*

Bidder Name

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

Title

Subscribed and sworn before me

this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Notary Public of New Jersey

My commission expires \_\_\_\_\_, 20\_\_\_\_

SEAL

**16.3. (TEMPLATE) Affirmative Action Affidavit**

**(P.L. 1975, C.127)**

**Bidder Name:** Enter Bidder Name

**Street Address:** Enter Street Address

**City, State Zip:** Enter City, State Zip

**Bid Proposal Certification:**

*Indicate below your compliance with New Jersey Affirmative Action regulations. Your proposal will be accepted even if you are not in compliance at this time. No contract and/or purchase order may be issued, however, until all Affirmative Action requirements are met.*

**Required Affirmative Action Evidence:**

*Procurement, Professional & Service Contracts (Exhibit A)*

**Supplier Partners must submit with proposal:**

1. A photocopy of their Federal Letter of Affirmative Action Plan Approval

OR

2. A photocopy of their Certificate of Employee Information Report

OR

3. A complete Affirmative Action Employee Information Report (AA302)

**Public Work – Over Fifty Thousand Dollars (\$50,000) Total Project Cost:**

*Check One –*

*No approved Federal or New Jersey Affirmative Action Plan. We will complete Report Form AA201-A upon receipt from the Customer Name, or*

*Approved Federal or New Jersey Plan – certificate enclosed*

*I further certify that the statements and information contained herein, are complete and correct to the best of my knowledge and belief.*

Bidder Name

\_\_\_\_\_  
*Authorized Signature*

Title

Date

***P.L. 1995, c. 127 (N.J.A.C. 17:27)***

***MANDATORY AFFIRMATIVE ACTION LANGUAGE***

***PROCUREMENT, PROFESSIONAL & SERVICE CONTRACTS***

During the performance of this contract, the Supplier Partner agrees as follows:

The Supplier Partner or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation. The Supplier Partner will take affirmative action to ensure that such applicants are recruited and employed, and that employees are treated during employment, without regard to their age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The Supplier Partner agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Public Agency Compliance Officer setting forth provisions of this non-discrimination clause.

The Supplier Partner or subcontractor, where applicable will, in all solicitations or advertisement for employees placed by or on behalf of the Supplier Partner, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation.

The Supplier Partner or subcontractor, where applicable, will send to each labor union or representative of workers with which it has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer advising the labor union or workers' representative of the Supplier Partner's commitments under this act and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The Supplier Partner or subcontractor, where applicable, agrees to comply with any regulations promulgated by the Treasurer pursuant to P.L. 1975, c. 127, as amended and supplemented from time to time and the Americans with Disabilities Act.

The Supplier Partner or subcontractor agrees to attempt in good faith to employ minority and female workers trade consistent with the applicable county employment goal prescribed by N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C.127, as amended and supplemented from time to time or in accordance with a binding determination of the applicable county employment goals determined by the Affirmative Action Office pursuant to N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C.127, as amended and supplemented from time to time.

The Supplier Partner or subcontractor agrees to inform in writing appropriate recruitment agencies in the area, including employment agencies, placement bureaus, colleges, universities, labor unions, that it does not discriminate on the basis of age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.

The Supplier Partner or subcontractor agrees to revise any of it testing procedures, if necessary, to assure that all personnel testing conforms with the principles of job-related testing, as established by the statutes and court

decisions of the state of New Jersey and as established by applicable Federal law and applicable Federal court decisions.

The Supplier Partner or subcontractor agrees to review all procedures relating to transfer, upgrading, downgrading and lay-off to ensure that all such actions are taken without regard to age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and conform with the applicable employment goals, consistent with the statutes and court decisions of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.

The Supplier Partner and its subcontractors shall furnish such reports or other documents to the Affirmative Action Office as may be requested by the office from time to time in order to carry out the purposes of these regulations, and public agencies shall furnish such information as may be requested by the Affirmative Action Office for conducting a compliance investigation pursuant to Subchapter 10 of the Administrative Code (NJAC 17:27).

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Signature of Procurement Agent

#### 16.4. Political Contribution Disclosure Form

##### Public Agency Instructions

This page provides guidance to public agencies entering into contracts with business entities that are required to file Political Contribution Disclosure forms with the agency. **It is not intended to be provided to Supplier Partners.** What follows are instructions on the use of form local units can provide to Supplier Partners that are required to disclose political contributions pursuant to N.J.S.A. 19:44A-20.26 (P.L. 2005, c. 271, s.2). Additional information on the process is available in Local Finance Notice 2006-1 ([www.nj.gov/dca/lgs/lfnmenu.shtml](http://www.nj.gov/dca/lgs/lfnmenu.shtml)).

1. The disclosure is required for all contracts in excess of seventeen thousand five hundred dollars (\$17,500) that are **not awarded** pursuant to a “fair and open” process (N.J.S.A. 19:44A-20.7).
2. Due to the potential length of some Supplier Partner submissions, the public agency should consider allowing data to be submitted in electronic form (i.e., spreadsheet, pdf file, etc.). Submissions must be kept with the contract documents or in an appropriate computer file and be available for public access. **The form is worded to accept this alternate submission.** The text should be amended if electronic submission will not be allowed.
3. The submission must be **received from the Supplier Partner and** on file at least ten (10) days prior to award of the contract. Resolutions of award should reflect that the disclosure has been received and is on file.
4. The Supplier Partner must disclose contributions made to candidate and party committees covering a wide range of public agencies, including all public agencies that have elected officials in the county of the public agency, state legislative positions, and various state entities. The Division of Local Government Services recommends that Supplier Partners be provided a list of the affected agencies. This will assist Supplier Partners in determining the campaign and political committees of the officials and candidates affected by the disclosure.

- a) The Division has prepared model disclosure forms for each county. They can be downloaded from the “County PCD Forms” link on the Pay-to-Play web site at [www.nj.gov/dca/lgs/p2p](http://www.nj.gov/dca/lgs/p2p). They will be updated from time-to-time, as necessary.
  - b) A public agency using these forms **should edit them to properly reflect the correct legislative district(s)**. As the forms are county-based, **they list all legislative districts** in each county. **Districts that do not represent the public agency should be removed from the lists.**
  - c) Some Supplier Partners may find it easier to provide a single list that covers all contributions, regardless of the county. These submissions are appropriate and should be accepted.
  - d) The form may be used “as-is”, subject to edits as described herein.
  - e) The “Supplier Partner Instructions” sheet is intended to be provided with the form. It is recommended that the Instructions and the form be printed on the same piece of paper. The form notes that the Instructions are printed on the back of the form; where that is not the case, the text should be edited accordingly.
  - f) The form is a Word document and can be edited to meet local needs, and posted for download on web sites, used as an e-mail attachment, or provided as a printed document.
5. It is recommended that the Supplier Partner also complete a “Stockholder Disclosure Certification.” This will assist the local unit in its obligation to ensure that Supplier Partner did not make any prohibited contributions to the committees listed on the Business Entity Disclosure Certification in the twelve (12) months prior to the contract. (See Local Finance Notice 2006-7 for additional information on this obligation) A sample Certification form is part of this package and the instruction to complete it is included in the Supplier Partner Instructions. **NOTE: This section is not applicable to Boards of Education.**

### **C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM Supplier Partner Instructions**

Supplier Partners receiving contracts from a public agency that are NOT awarded pursuant to a “fair and open” process (defined at N.J.S.A. 19:44A-20.7) are subject to the provisions of P.L. 2005, c. 271, s.2 (N.J.S.A. 19:44A-20.26). This law provides that ten (10) days prior to the award of such a contract, the Supplier Partner shall disclose contributions to:

- 1) any State, county, or municipal committee of a political party,
- 2) any legislative leadership committee\*
- 3) any continuing political committee (a.k.a., political action committee),
- 4) any candidate committee of a candidate for, or holder of, an elective office:
  - a) of the public entity awarding the contract,
  - b) of that county in which that public entity is located,
  - c) of another public entity within that county,
  - d) or of a legislative district in which that public entity is located or, when the public entity is a county, of any legislative district which includes all or part of the county. The disclosure must list reportable contributions to any of the committees that exceed three hundred dollars (\$300) per election cycle that were made during the twelve (12) months prior to award of the contract. See N.J.S.A. 19:44A-8 and 19:44A-16 for more details on reportable contributions.

N.J.S.A. 19:44A-20.26 itemizes the parties from whom contributions must be disclosed when a business entity is not a natural person. This includes the following:

- 1) individuals with an “interest” ownership or control of more than ten percent (10%) of the profits or assets of a business entity or 10% of the stock in the case of a business entity that is a corporation for profit,
- 2) all principals, partners, officers, or directors of the business entity or their spouses,
- 3) any subsidiaries directly or indirectly controlled by the business entity,

4) IRS Code Section 527 New Jersey based organizations, directly or indirectly controlled by the business entity and filing as continuing political committees, (PACs). When the business entity is a natural person, “a contribution by that person’s spouse or child, residing therewith, shall be deemed to be a contribution by the business entity.” [N.J.S.A. 19:44A-20.26(b)] The contributor must be listed on the disclosure. Any business entity that fails to comply with the disclosure provisions shall be subject to a fine imposed by ELEC in an amount to be determined by the Commission which may be based upon the amount that the business entity failed to report. The enclosed list of agencies is provided to assist the Supplier Partner in identifying those public agencies whose elected official and/or candidate campaign committees are affected by the disclosure requirement. It is the Supplier Partner’s responsibility to identify the specific committees to which contributions may have been made and need to be disclosed. The disclosed information may exceed the minimum requirement. The enclosed form, a content-consistent facsimile, or an electronic data file containing the required details (along with a signed cover sheet) may be used as the Supplier Partner’s submission and is disclosable to the public under the Open Public Records Act. The Supplier Partner must also complete the attached Stockholder Disclosure Certification. This will assist the agency in meeting its obligations under the law.

**NOTE: This section does not apply to Board of Education contracts.**

<sup>1</sup> N.J.S.A. 19:44A-3(s): “The term “legislative leadership committee” means a committee established, authorized to be established, or designated by the President of the Senate, the Minority Leader of the Senate, the Speaker of the General Assembly or the Minority Leader of the General Assembly pursuant to section 16 of P.L.1993, c.65 (C.19:44A-10.1) for the purpose of receiving contributions and making expenditures.”

**C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM**

Required Pursuant to N.J.S.A. 19:44A-20.26

**This form or its permitted facsimile must be submitted to the local unit no later than ten (10) days prior to the award of the contract.**

**Part I – Supplier Partner Information**

Bidder Name:	Click or tap here to enter text.				
Address:	Click or tap here to enter text.				
City:	Click or tap here to enter text.	State:	Click or tap here to enter text.	Zip:	Click or tap here to enter text.

The undersigned being authorized to certify, hereby certifies that the submission provided herein represents compliance with the provisions of N.J.S.A. 19:44A-20.26 and as represented by the Instructions accompanying this form.

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

Printed Name

Title



**Part II – Contribution Disclosure**

Disclosure requirement: Pursuant to N.J.S.A. 19:44A-20.26 this disclosure must include all reportable political contributions (more than three hundred dollars (\$300) per election cycle) over the twelve (12) months prior to submission to the committees of the government entities listed on the form provided by the local unit.

Check here if disclosure is provided in electronic form.

Contributor Name	Recipient Name	Date	Dollar Amount
N/A	Recipient Name	Date	\$Amount
Contributor Name	Recipient Name	Date	\$Amount
Contributor Name	Recipient Name	Date	\$Amount
Contributor Name	Recipient Name	Date	\$Amount
Contributor Name	Recipient Name	Date	\$Amount
Contributor Name	Recipient Name	Date	\$Amount
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Contributor Name	Recipient Name	Date	\$Amount
Contributor Name	Recipient Name	Date	\$Amount
Contributor Name	Recipient Name	Date	\$Amount

Check here if the information is continued on subsequent page(s)

**List of Agencies with Elected Officials Required for Political Contribution Disclosure**

**N.J.S.A. 19:44A-20.26**

**County Name:**

State: Governor, and Legislative Leadership Committees

Legislative District #s:

State Senator and two members of the General Assembly per district.

**County:**

Freeholders

{County Executive}

County Clerk

Surrogate

Sheriff

Municipalities (Mayor and members of governing body, regardless of title):

**USERS SHOULD CREATE THEIR OWN FORM, OR DOWNLOAD FROM [WWW.NJ.GOV/DCA/LGS/P2P](http://WWW.NJ.GOV/DCA/LGS/P2P) A COUNTY-BASED, CUSTOMIZABLE FORM.**

**16.5. Stockholder Disclosure Form**

**Name of Business:**

I certify that the list below contains the names and home addresses of all stockholders holding ten percent (10%) or more of the issued and outstanding stock of the undersigned.

OR

I certify that no one stockholder owns ten percent (10%) or more of the issued and outstanding stock of the undersigned.

**Check the box that represents the type of business organization:**

Partnership

Corporation

Sole Proprietorship

Limited Partnership

Limited Liability Corporation

Limited Liability Partnership

Subchapter S Corporation

Sign and notarize the form below, and, if necessary, complete the stockholder list below.

**Stockholders:**

Name: Stockholder Name	Name: Stockholder Name
Home Address: Home Address	Home Address: Home Address
Name: Stockholder Name	Name: Stockholder Name

Home Address: Home Address	Home Address: Home Address
Name: Stockholder Name	Name: Stockholder Name
Home Address: Home Address	Home Address: Home Address
Subscribed and sworn before me this ____ day of _____, 2 __.	_____ (Affiant)
(Notary Public)	_____ (Print name & title of affiant)
My Commission expires:	(Corporate Seal)

**17. Required Documents for Supplier Partners Intending to Do Business in Arizona**

**17.1. Arizona Supplier Partner Requirements**

AZ Compliance with Federal and state requirements. Supplier Partner agrees when working on any federally assisted projects with more than two thousand dollars (\$2,000.00) in labor costs, to comply with all federal and state requirements, as well as Equal Opportunity Employment requirements and all other federal and state laws, statutes, etc. Supplier Partner agrees to post wage rates at the work site and submit a copy of their payroll to the member for their files. Supplier Partner must retain records for three years to allow the federal grantor agency access to these records, upon demand. Supplier Partner also agrees to comply with the Arizona Executive Order 75-5, as amended by Executive Order 99-4.

When working on contracts funded with Federal Grant monies, Supplier Partner additionally agrees to comply with the administrative requirements for grants, and cooperative agreements to state, local and federally recognized Indian Tribal Governments.

AZ Compliance with workforce requirements. Pursuant to ARS 41-4401, Supplier Partner and subcontractor(s) warrant their compliance with all federal and state immigration laws and regulations that relate to their employees, and compliance with ARS 23-214 subsection A, which states, ..."every employer, after hiring an employee, shall verify the employment eligibility of the employee through the E-Verify program".

CCOG reserves the right to cancel or suspend the use of any contract for violations of immigration laws and regulations. CCOG and its members reserve the right to inspect the papers of any Supplier Partner or subcontract employee who works under this contract to ensure compliance with the warranty above.

AZ Supplier Partner Employee Work Eligibility. By entering into this contract, Supplier Partner agrees and warrants compliance with A.R.S. 41-4401, A.R.S. 23-214, the Federal Immigration and Nationality Act (FINA), and all other Federal immigration laws and regulations. CCOG and/or Equalis Group members may request verification of compliance from any Supplier Partner or subcontractor performing work under this contract. CCOG and Equalis Group members reserve the right to confirm compliance. In the event that CCOG or Equalis Group members suspect or find that any Supplier Partner or subcontractor is not in compliance, CCOG may pursue any and all remedies allowed by law, including but not limited to suspension of work, termination of

contract, suspension and/or debarment of the Supplier Partner. All cost associated with any legal action will be the responsibility of the Supplier Partner.

AZ Non-Compliance. All federally assisted contracts to members that exceed ten thousand dollars (\$10,000.00) may be terminated by the federal grantee for noncompliance by Supplier Partner. In projects that are not federally funded, respondent must agree to meet any federal, state or local requirements as necessary. In addition, if compliance with the federal regulations increases the contract costs beyond the agreed on costs in this solicitation, the additional costs may only apply to the portion of the work paid by the federal grantee.

Registered Sex Offender Restrictions (Arizona). For work to be performed at an Arizona school, Supplier Partner agrees that no employee or employee of a subcontractor who has been adjudicated to be a registered sex offender will perform work at any time when students are present, or reasonably expected to be present. Supplier Partner agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the purchase order at the Equalis Group member's discretion. Supplier Partner must identify any additional costs associated with compliance to this term. If no costs are specified, compliance with this term will be provided at no additional charge.

Offshore Performance of Work Prohibited. Due to security and identity protection concerns, direct services under this contract shall be performed within the borders of the United States.

Terrorism Country Divestments. In accordance with A.R.S. 35-392, CCOG and Equalis Group members are prohibited from purchasing from a company that is in violation of the Export Administration Act. By entering into the contract, Supplier Partner warrants compliance with the Export Administration Act.

The undersigned hereby accepts and agrees to comply with all statutory compliance and notice requirements listed in this document.

\_\_\_\_\_  
Signature of Authorized Representative

Date