



**INTERNAL SERVICES DEPARTMENT
PROCUREMENT MANAGEMENT SERVICES**

Justification/Input Document for Non-Competitive Acquisition

It is the policy of Miami-Dade County to consistently purchase goods and services using full and open competition. The citizens of Miami-Dade County are best served when we make sound business decisions based on competitive bids or proposals. Early acquisition planning that includes consultation with Internal Service Department's procurement staff can help avoid delays and facilitates effective market research. However, there may be instances when other than full and open competition may be justified. When a user department(s) determines that other than full and open competition is necessary or in the best interest of the County, appropriate justification for that course of action must be submitted to ISD for approval and execution in order to waive the competitive bid/proposal process.

Please provide the information requested below to support the need and feasibility for waiving the competitive bid/proposal process:

Department:	ITD for Countywide use		
Contact Person:	Mirta Cardoso	Phone Number:	305-596-8690
Requisition No.:	RQET1400007	Estimated Value:	\$495,000.00
Proposed Vendor:	Info-Tech Research Group Inc.		
Previous Contract Number:	N/A	Previous Contract Value:	N/A

Purpose of the Purchase

Please describe your minimum requirements and the benefits of making the acquisition.

The Miami-Dade Information Technology Leadership Council (ITLC) membership undertakes projects to meet a myriad of IT Initiatives and goals in accordance with the various business plans of the departments within Strategic Areas. The successful planning and execution of these projects require access to IT research, advisory and professional services in an effort to implement the best technology for the business need being considered, effectively plan based on an experienced knowledge base, reduce IT costs, increase business efficiencies and improve service delivery to departments and constituents.

The following are the existing ITLC working groups requiring these services:

- Browser Modernization / Standards and Application Compatibility Working Group
- Cashiering Working Group
- Change Management Working Group
- Code Enforcement / Permitting Working Group
- Governance / PMO Working Group
- IT Enterprise Billing Working Group
- IT Service Center Working Group
- Security Working Group
- Software Metering Working Group

Best Interest of the County / Uniqueness of Product

Please provide a detailed description as to why a waiver of formal bidding is in the County's best interest (e.g., product standardization, compatibility, proprietary access or distributorship, how vendor is uniquely qualified to provide the needed product or service, etc.). Please note that a lack of advance planning is not an acceptable justification for a non-competitive acquisition.

The ITLC has current and future initiatives that encompass Information Technology research, advisory and specific implementation services such as: Practices discovery, IT service management, service delivery & management, strategy & governance and value creation & measurement, research papers, analyst reviews, analyst calls, IT metrics of all types, benchmarking, peer networking, tools and templates, vendor analysis and review, best practices, disaster planning and recovery, consulting and advisory services and the latest technology issues, eg., cloud, big data and BYOD.

Contract GS-35F-0041U provides these services and allows the purchase/renewal of IT advisory services licenses and allows for specific scopes of work as needed and in support of the ITLC.

The licensing offered provides one cost, which can then be divided among participating departments, greatly reducing the total licensing costs. The total cost is divided among the participating departments. This allows for departments that could not afford service to gain access via one ITLC membership to technical information that can assist with timely and effective decision-making.

Market Research

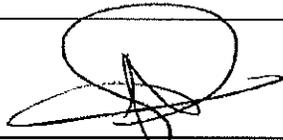
Please describe your market research and the results thereof. This should include a description of other, similar sources or products available in the market if any and why they are not acceptable.

Although there are other IT Research services available, the pricing structure offered by Info-Tech is much more affordable than the services offered by other vendors, such as Gartner. Info-tech pricing model bridges the budgetary gaps that exist in several departments by significantly lowering the cost for IT research and advisory services.

Proposed Actions

Please describe the actions the department will take to overcome the present barriers to competition prior to any future acquisitions of this product or service.

N/A



Department Director's Approval

4/17/2014

Date Approved

Info-Tech Research Group Inc.

AUTHORIZED
INFORMATION TECHNOLOGY SCHEDULE PRICELIST
GENERAL PURPOSE COMMERCIAL INFORMATION TECHNOLOGY
EQUIPMENT, SOFTWARE AND SERVICES

General Description: Info-Tech Research Group's research and advisory products provide IT professionals with advice and guidance on a full spectrum of IT issues including best practices, vendor selection and contract review.

SPECIAL ITEM NUMBER I32-51 - INFORMATION TECHNOLOGY (IT) PROFESSIONAL SERVICES

FPDS Code D301	IT Facility Operation and Maintenance
FPDS Code D302	IT Systems Development Services
FPDS Code D306	IT Systems Analysis Services
FPDS Code D307	Automated Information Systems Design and Integration Services
FPDS Code D308	Programming Services
FPDS Code D310	IT Backup and Security Services
FPDS Code D311	IT Data Conversion Services
FPDS Code D313	Computer Aided Design/Computer Aided Manufacturing (CAD/CAM) Services
FPDS Code D316	IT Network Management Services
FPDS Code D317	Creation/Retrieval of IT Related Automated News Services, Data Services, or Other Information Services (All other information services belong under Schedule 76)
FPDS Code D399	Other Information Technology Services, Not Elsewhere Classified

Note 1: All non-professional labor categories must be incidental to and used solely to support hardware, software and/or professional services, and cannot be purchased separately.

Note 2: Offerors and Agencies are advised that the Group 70 – Information Technology Schedule is not to be used as a means to procure services which properly fall under the Brooks Act. These services include, but are not limited to, architectural, engineering, mapping, cartographic production, remote sensing, geographic information systems, and related services. FAR 36.6 distinguishes between mapping services of an A/E nature and mapping services which are not connected nor incidental to the traditionally accepted A/E Services.

Note 3: This solicitation is not intended to solicit for the reselling of IT Professional Services, except for the provision of implementation, maintenance, integration, or training services in direct support of a product. Under such circumstances the services must be performed by the publisher or manufacturer or one of their authorized agents.

Info-Tech Research Group Inc.
602 Queens Avenue, London, ON, Canada, N6B 1Y8
(519)-432-3550
www.infotech.com

Contract Number: GS-35F-0041U

Period Covered by Contract: October 19, 2007 to October 18, 2017

General Services Administration
Federal Acquisition Service

Pricelist current through Modification #PS-0005, dated April 15, 2011.

Products and ordering information in this Authorized Information Technology Schedule Pricelist are also available on the GSA Advantage! System (<http://www.gsadvantage.gov>).

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INFORMATION FOR ORDERING ACTIVITIES APPLICABLE TO ALL SPECIAL ITEM NUMBERS

SPECIAL NOTICE TO AGENCIES: Small Business Participation

SBA strongly supports the participation of small business concerns in the Federal Acquisition Service. To enhance Small Business Participation SBA policy allows agencies to include in their procurement base and goals, the dollar value of orders expected to be placed against the Federal Supply Schedules, and to report accomplishments against these goals.

For orders exceeding the micropurchase threshold, FAR 8.404 requires agencies to consider the catalogs/pricelists of at least three schedule contractors or consider reasonably available information by using the GSA Advantage!™ on-line shopping service (www.gsaadvantage.gov). The catalogs/pricelists, GSA Advantage!™ and the Federal Acquisition Service Home Page (www.gsa.gov/fas) contain information on a broad array of products and services offered by small business concerns.

This information should be used as a tool to assist ordering activities in meeting or exceeding established small business goals. It should also be used as a tool to assist in including small, small disadvantaged, and women-owned small businesses among those considered when selecting pricelists for a best value determination.

For orders exceeding the micropurchase threshold, customers are to give preference to small business concerns when two or more items at the same delivered price will satisfy their requirement.

1. GEOGRAPHIC SCOPE OF CONTRACT:

Domestic delivery is delivery within the 48 contiguous states, Alaska, Hawaii, Puerto Rico, Washington, DC, and U.S. Territories. Domestic delivery also includes a port or consolidation point, within the aforementioned areas, for orders received from overseas activities.

Overseas delivery is delivery to points outside of the 48 contiguous states, Washington, DC, Alaska, Hawaii, Puerto Rico, and U.S. Territories.

Offerors are requested to check one of the following boxes:

- The Geographic Scope of Contract will be domestic and overseas delivery.
- The Geographic Scope of Contract will be overseas delivery only.
- The Geographic Scope of Contract will be domestic delivery only.

For Special Item Number 132-53 Wireless Services ONLY, if awarded, list the limited geographic coverage area:

2. CONTRACTOR'S ORDERING ADDRESS AND PAYMENT INFORMATION:

Info-Tech Research Group Inc.
ATTN: GSA Contract Administration
602 Queens Avenue, London, ON, Canada
N6B 1Y8
www.infotech.com

Contractor must accept the credit card for payments equal to or less than the micro-purchase for oral or written orders under this contract. The Contractor and the ordering agency may agree to use the credit card for dollar amounts over the micro-purchase threshold (See GSAR 552.232-79 Payment by Credit Card). In addition, bank account information for wire transfer payments will be shown on the invoice.

The following telephone number(s) can be used by ordering activities to obtain technical and/or ordering assistance:

(888) 670-8889

When Authorized Dealers are allowed by the Contractor to bill ordering activities and accept payment, the order and/or payment must be in the name of the Contractor, in care of the Authorized Dealer.

3. LIABILITY FOR INJURY OR DAMAGE

The Contractor shall not be liable for any injury to ordering activity personnel or damage to ordering activity property arising from the use of equipment maintained by the Contractor, unless such injury or damage is due to the fault or negligence of the Contractor.

4. STATISTICAL DATA FOR GOVERNMENT ORDERING OFFICE COMPLETION OF STANDARD FORM 279:

- Block 9: G. Order/Modification Under Federal Schedule Contract
- Block 16: Data Universal Numbering System (DUNS) Number: 254062714
- Block 30: Type of Contractor: C. Large Business
- Block 31: Woman-Owned Small Business - No
- Block 37: Contractor's Taxpayer Identification Number (TIN): EIN# 98-0469805
- Block 40: Veteran Owned Small Business (VOSB): No

- 4a. CAGE Code: L3820
- 4b. Contractor has registered with the Central Contractor Registration Database.

5. FOB DESTINATION

6. DELIVERY SCHEDULE

a. **TIME OF DELIVERY:** The Contractor shall deliver to destination within the number of calendar days after receipt of order (ARO), as set forth below:

SPECIAL ITEM NUMBER	DELIVERY TIME (Days ARO)
132-51	1 Day

b. **URGENT REQUIREMENTS:** When the Federal Supply Schedule contract delivery period does not meet the bona fide urgent delivery requirements of an ordering activity, ordering activities are encouraged, if time permits, to contact the Contractor for the purpose of obtaining accelerated delivery. The Contractor shall reply to the inquiry within 3 workdays after receipt. (Telephonic replies shall be confirmed by the Contractor in writing.) If the Contractor offers an accelerated delivery time acceptable to the ordering activity, any order(s) placed pursuant to the agreed upon accelerated delivery time frame shall be delivered within this shorter delivery time and in accordance with all other terms and conditions of the contract.

c. i. SIN 132-54 and SIN 132-55, **ACCELERATED SERVICE DELIVERY (7 calendar days or less):** the time required for COMSATCOM services to be available after order award. Under Accelerated Service Task Orders, service acceptance testing, unless otherwise required by the satellite provider or host nation, shall be deferred until Ordering Activity operations permit.

ii. SIN 132-54 and SIN 132-55, **TIME-CRITICAL DELIVERY (4 hours or less):** the time required for COMSATCOM services to be available after order award. Under Time-Critical Task Orders, service acceptance testing unless otherwise required by the satellite provider or host nation shall be deferred until Ordering Activity operations permit. Time-Critical Delivery shall be predicated on the availability of COMSATCOM transponded capacity (contracted bandwidth and power, pre-arranged Host Nation Agreements, frequency clearance) or COMSATCOM subscription services (bandwidth, terminals, network resources, etc.).

iii. For SIN 132-54 and SIN 132-55, **EXTENDED SERVICE DELIVERY TIMES:** the time required under extenuating circumstances for COMSATCOM services to be available after order award. Such extenuating

circumstances may include extended time required for host nation agreements or landing rights, or other time intensive service delivery requirements as defined in the individual requirement. Any such extended delivery times will be negotiated between the Ordering Activity and Contractor.

7. **DISCOUNTS:** Prices shown are NET Prices; Basic Discounts have been deducted.
- a. Prompt Payment: 1% - 15 net 30 days from receipt of invoice or date of acceptance, whichever is later.
 - b. Quantity – none offered
 - c. Dollar Volume: task orders at or exceeding \$280,000 receive an additional 2%, orders over \$400,000 receive and additional 3% and tasks orders over \$500,000 will have a discount to be negotiated on a case by case basis
 - d. Government Educational Institutions: Governmental Educational Institutions are offered the same discounts as all other Government customers
 - e. Other

8. **TRADE AGREEMENTS ACT OF 1979, as amended:**

All items are U.S. made end products, designated country end products, Caribbean Basin country end products, Canadian end products, or Mexican end products as defined in the Trade Agreements Act of 1979, as amended.

9. **STATEMENT CONCERNING AVAILABILITY OF EXPORT PACKING:**

10. **Small Requirements:** The minimum dollar value of orders to be issued is \$100.

11. **MAXIMUM ORDER (All dollar amounts are exclusive of any discount for prompt payment.)**

- a. The Maximum Order value for the following Special Item Numbers (SINs) is \$500,000:
Special Item Number 132-51 - Information Technology Professional Services

12. **ORDERING PROCEDURES FOR FEDERAL SUPPLY SCHEDULE CONTRACTS**

Ordering activities shall use the ordering procedures of Federal Acquisition Regulation (FAR) 8.405 when placing an order or establishing a BPA for supplies or services. These procedures apply to all schedules.

- a. FAR 8.405-1 Ordering procedures for supplies, and services not requiring a statement of work.
- b. FAR 8.405-2 Ordering procedures for services requiring a statement of work.

13. **FEDERAL INFORMATION TECHNOLOGY/TELECOMMUNICATION STANDARDS**

REQUIREMENTS: ordering activities acquiring products from this Schedule must comply with the provisions of the Federal Standards Program, as appropriate (reference: NIST Federal Standards Index). Inquiries to determine whether or not specific products listed herein comply with Federal Information Processing Standards (FIPS) or Federal Telecommunication Standards (FED-STDS), which are cited by ordering activities, shall be responded to promptly by the Contractor.

13.1 **FEDERAL INFORMATION PROCESSING STANDARDS PUBLICATIONS (FIPS PUBS):**

Information Technology products under this Schedule that do not conform to Federal Information Processing

Standards (FIPS) should not be acquired unless a waiver has been granted in accordance with the applicable "FIPS Publication." Federal Information Processing Standards Publications (FIPS PUBS) are issued by the U.S. Department of Commerce, National Institute of Standards and Technology (NIST), pursuant to National Security Act. Information concerning their availability and applicability should be obtained from the National Technical Information Service (NTIS), 5285 Port Royal Road, Springfield, Virginia 22161. FIPS PUBS include voluntary standards when these are adopted for Federal use. Individual orders for FIPS PUBS should be referred to the NTIS Sales Office, and orders for subscription service should be referred to the NTIS Subscription Officer, both at the above address, or telephone number (703) 487-4650.

13.2 FEDERAL TELECOMMUNICATION STANDARDS (FED-STDS): Telecommunication products under this Schedule that do not conform to Federal Telecommunication Standards (FED-STDS) should not be acquired unless a waiver has been granted in accordance with the applicable "FED-STD." Federal Telecommunication Standards are issued by the U.S. Department of Commerce, National Institute of Standards and Technology (NIST), pursuant to National Security Act. Ordering information and information concerning the availability of FED-STDS should be obtained from the GSA, Federal Acquisition Service, Specification Section, 470 East L'Enfant Plaza, Suite 8100, SW, Washington, DC 20407, telephone number (202)619-8925. Please include a self-addressed mailing label when requesting information by mail. Information concerning their applicability can be obtained by writing or calling the U.S. Department of Commerce, National Institute of Standards and Technology, Gaithersburg, MD 20899, telephone number (301)975-2833.

14. CONTRACTOR TASKS / SPECIAL REQUIREMENTS (C-FSS-370) (NOV 2003)

- (a) Security Clearances: The Contractor may be required to obtain/possess varying levels of security clearances in the performance of orders issued under this contract. All costs associated with obtaining/possessing such security clearances should be factored into the price offered under the Multiple Award Schedule.
- (b) Travel: The Contractor may be required to travel in performance of orders issued under this contract. Allowable travel and per diem charges are governed by Pub .L. 99-234 and FAR Part 31, and are reimbursable by the ordering agency or can be priced as a fixed price item on orders placed under the Multiple Award Schedule. Travel in performance of a task order will only be reimbursable to the extent authorized by the ordering agency. The Industrial Funding Fee does NOT apply to travel and per diem charges.
- (c) Certifications, Licenses and Accreditations: As a commercial practice, the Contractor may be required to obtain/possess any variety of certifications, licenses and accreditations for specific FSC/service code classifications offered. All costs associated with obtaining/ possessing such certifications, licenses and accreditations should be factored into the price offered under the Multiple Award Schedule program.
- (d) Insurance: As a commercial practice, the Contractor may be required to obtain/possess insurance coverage for specific FSC/service code classifications offered. All costs associated with obtaining/possessing such insurance should be factored into the price offered under the Multiple Award Schedule program.
- (e) Personnel: The Contractor may be required to provide key personnel, resumes or skill category descriptions in the performance of orders issued under this contract. Ordering activities may require agency approval of additions or replacements to key personnel.
- (f) Organizational Conflicts of Interest: Where there may be an organizational conflict of interest as determined by the ordering agency, the Contractor's participation in such order may be restricted in accordance with FAR Part 9.5.
- (g) Documentation/Standards: The Contractor may be requested to provide products or services in accordance with rules, regulations, OMB orders, standards and documentation as specified by the agency's order.

- (h) **Data/Deliverable Requirements:** Any required data/deliverables at the ordering level will be as specified or negotiated in the agency's order.
- (i) **Government-Furnished Property:** As specified by the agency's order, the Government may provide property, equipment, materials or resources as necessary.
- (j) **Availability of Funds:** Many Government agencies' operating funds are appropriated for a specific fiscal year. Funds may not be presently available for any orders placed under the contract or any option year. The Government's obligation on orders placed under this contract is contingent upon the availability of appropriated funds from which payment for ordering purposes can be made. No legal liability on the part of the Government for any payment may arise until funds are available to the ordering Contracting Officer.
- (k) **Overtime:** For professional services, the labor rates in the Schedule should not vary by virtue of the Contractor having worked overtime. For services applicable to the Service Contract Act (as identified in the Schedule), the labor rates in the Schedule will vary as governed by labor laws (usually assessed a time and a half of the labor rate).

15. CONTRACT ADMINISTRATION FOR ORDERING ACTIVITIES: Any ordering activity, with respect to any one or more delivery orders placed by it under this contract, may exercise the same rights of termination as might the GSA Contracting Officer under provisions of FAR 52.212-4, paragraphs (l) Termination for the ordering activity's convenience, and (m) Termination for Cause (See 52.212-4)

16. GSA ADVANTAGE!

GSA Advantage! is an on-line, interactive electronic information and ordering system that provides on-line access to vendors' schedule prices with ordering information. GSA Advantage! will allow the user to perform various searches across all contracts including, but not limited to:

- (1) Manufacturer;
- (2) Manufacturer's Part Number; and
- (3) Product categories.

Agencies can browse GSA Advantage! by accessing the Internet World Wide Web utilizing a browser (ex.: NetScape). The Internet address is <http://www.gsaadvantage.gov>

17. PURCHASE OF OPEN MARKET ITEMS

NOTE: Open Market Items are also known as incidental items, noncontract items, non-Schedule items, and items not on a Federal Supply Schedule contract. ODCs (Other Direct Costs) are not part of this contract and should be treated as open market purchases. Ordering Activities procuring open market items must follow FAR 8.402(f).

For administrative convenience, an ordering activity contracting officer may add items not on the Federal Supply Multiple Award Schedule (MAS) -- referred to as open market items -- to a Federal Supply Schedule blanket purchase agreement (BPA) or an individual task or delivery order, **only if-**

- (1) All applicable acquisition regulations pertaining to the purchase of the items not on the Federal Supply Schedule have been followed (e.g., publicizing (Part 5), competition requirements (Part 6), acquisition of commercial items (Part 12), contracting methods (Parts 13, 14, and 15), and small business programs (Part 19));
- (2) The ordering activity contracting officer has determined the price for the items not on the Federal Supply Schedule is fair and reasonable;
- (3) The items are clearly labeled on the order as items not on the Federal Supply Schedule; and
- (4) All clauses applicable to items not on the Federal Supply Schedule are included in the order.

18. CONTRACTOR COMMITMENTS, WARRANTIES AND REPRESENTATIONS

a. For the purpose of this contract, commitments, warranties and representations include, in addition to those agreed to for the entire schedule contract:

- (1) Time of delivery/installation quotations for individual orders;
- (2) Technical representations and/or warranties of products concerning performance, total system performance and/or configuration, physical, design and/or functional characteristics and capabilities of a product/equipment/ service/software package submitted in response to requirements which result in orders under this schedule contract.
- (3) Any representations and/or warranties concerning the products made in any literature, description, drawings and/or specifications furnished by the Contractor.

b. The above is not intended to encompass items not currently covered by the GSA Schedule contract.

19. OVERSEAS ACTIVITIES

The terms and conditions of this contract shall apply to all orders for installation, maintenance and repair of equipment in areas listed in the pricelist outside the 48 contiguous states and the District of Columbia, except as indicated below:

NONE

Upon request of the Contractor, the ordering activity may provide the Contractor with logistics support, as available, in accordance with all applicable ordering activity regulations. Such ordering activity support will be provided on a reimbursable basis, and will only be provided to the Contractor's technical personnel whose services are exclusively required for the fulfillment of the terms and conditions of this contract.

20. BLANKET PURCHASE AGREEMENTS (BPAs)

The use of BPAs under any schedule contract to fill repetitive needs for supplies or services is allowable. BPAs may be established with one or more schedule contractors. The number of BPAs to be established is within the discretion of the ordering activity establishing the BPA and should be based on a strategy that is expected to maximize the effectiveness of the BPA(s). Ordering activities shall follow FAR 8.405-3 when creating and implementing BPA(s).

21. CONTRACTOR TEAM ARRANGEMENTS

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

22. INSTALLATION, DEINSTALLATION, REINSTALLATION

The Davis-Bacon Act (40 U.S.C. 276a-276a-7) provides that contracts in excess of \$2,000 to which the United States or the District of Columbia is a party for construction, alteration, or repair (including painting and decorating) of public buildings or public works with the United States, shall contain a clause that no laborer or mechanic employed directly upon the site of the work shall received less than the prevailing wage rates as determined by the Secretary of Labor. The requirements of the Davis-Bacon Act do not apply if the construction work is incidental to the furnishing of supplies, equipment, or services. For example, the requirements do not apply to simple installation or alteration of a public building or public work that is incidental to furnishing supplies or equipment under a supply contract. However, if the construction, alteration or repair is segregable and exceeds \$2,000, then the requirements of the Davis-Bacon Act applies.

The ordering activity issuing the task order against this contract will be responsible for proper administration and enforcement of the Federal labor standards covered by the Davis-Bacon Act. The proper Davis-Bacon wage determination will be issued by the ordering activity at the time a request for quotations is made for applicable construction classified installation, deinstallation, and reinstallation services under SIN 132-8 or 132-9.

23. SECTION 508 COMPLIANCE.

I certify that in accordance with 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d), FAR 39.2, and the Architectural and Transportation Barriers Compliance Board Electronic and Information Technology (EIT) Accessibility Standards (36 CFR 1194) General Services Administration (GSA), that all IT hardware/software/services are 508 compliant:

Yes yes

No

The offeror is required to submit with its offer a designated area on its website that outlines the Voluntary Product Accessibility Template (VPAT) or equivalent qualification, which ultimately becomes the Government Product Accessibility Template (GPAT). Section 508 compliance information on the supplies and services in this contract are available at the following website address (URL): _____

The EIT standard can be found at: www.Section508.gov/.

24. PRIME CONTRACTOR ORDERING FROM FEDERAL SUPPLY SCHEDULES.

Prime Contractors (on cost reimbursement contracts) placing orders under Federal Supply Schedules, on behalf of an ordering activity, shall follow the terms of the applicable schedule and authorization and include with each order –

- (a) A copy of the authorization from the ordering activity with whom the contractor has the prime contract (unless a copy was previously furnished to the Federal Supply Schedule contractor); and
- (b) The following statement:

This order is placed under written authorization from _____ dated _____. In the event of any inconsistency between the terms and conditions of this order and those of your Federal Supply Schedule contract, the latter will govern.

25. INSURANCE—WORK ON A GOVERNMENT INSTALLATION (JAN 1997)(FAR 52.228-5)

(a) The Contractor shall, at its own expense, provide and maintain during the entire performance of this contract, at least the kinds and minimum amounts of insurance required in the Schedule or elsewhere in the contract.

(b) Before commencing work under this contract, the Contractor shall notify the Contracting Officer in writing that the required insurance has been obtained. The policies evidencing required insurance shall contain an endorsement to the effect that any cancellation or any material change adversely affecting the Government's interest shall not be effective—

- (1) For such period as the laws of the State in which this contract is to be performed prescribe; or
- (2) Until 30 days after the insurer or the Contractor gives written notice to the Contracting Officer, whichever period is longer.

(c) The Contractor shall insert the substance of this clause, including this paragraph (c), in subcontracts under this contract that require work on a Government installation and shall require subcontractors to provide and maintain the insurance required in the Schedule or elsewhere in the contract. The Contractor shall maintain a copy of all subcontractors' proofs of required insurance, and shall make copies available to the Contracting Officer upon request.

26. SOFTWARE INTEROPERABILITY.

Offerors are encouraged to identify within their software items any component interfaces that support open standard interoperability. An item's interface may be identified as interoperable on the basis of participation in a Government agency-sponsored program or in an independent organization program. Interfaces may be identified by reference to an interface registered in the component registry located at <http://www.core.gov>.

27. ADVANCE PAYMENTS

A payment under this contract to provide a service or deliver an article for the United States Government may not be more than the value of the service already provided or the article already delivered. Advance or pre-payment is not authorized or allowed under this contract. (31 U.S.C. 3324)

TERMS AND CONDITIONS APPLICABLE TO INFORMATION TECHNOLOGY (IT) PROFESSIONAL SERVICES (SPECIAL ITEM NUMBER 132-51) AND IDENTITY ACCESS MANAGEMENT PROFESSIONAL SERVICES (SPECIAL ITEM NUMBER 132-60F)

******NOTE: All non-professional labor categories must be incidental to, and used solely to support professional services, and cannot be purchased separately.***

1. SCOPE

- a. The prices, terms and conditions stated under Special Item Number 132-51 Information Technology Professional Services apply exclusively to IT Professional Services within the scope of this Information Technology Schedule.
- b. The Contractor shall provide services at the Contractor's facility and/or at the ordering activity location, as agreed to by the Contractor and the ordering activity.

2. PERFORMANCE INCENTIVES I-FSS-60 Performance Incentives (April 2000)

- a. Performance incentives may be agreed upon between the Contractor and the ordering activity on individual fixed price orders or Blanket Purchase Agreements under this contract.
- b. The ordering activity must establish a maximum performance incentive price for these services and/or total solutions on individual orders or Blanket Purchase Agreements.
- c. Incentives should be designed to relate results achieved by the contractor to specified targets. To the maximum extent practicable, ordering activities shall consider establishing incentives where performance is critical to the ordering activity's mission and incentives are likely to motivate the contractor. Incentives shall be based on objectively measurable tasks.

3. ORDER

- a. Agencies may use written orders, EDI orders, blanket purchase agreements, individual purchase orders, or task orders for ordering services under this contract. Blanket Purchase Agreements shall not extend beyond the end of the contract period; all services and delivery shall be made and the contract terms and conditions shall continue in effect until the completion of the order. Orders for tasks which extend beyond the fiscal year for which funds are available shall include FAR 52.232-19 (Deviation – May 2003) Availability of Funds for the Next Fiscal Year. The purchase order shall specify the availability of funds and the period for which funds are available.
- b. All task orders are subject to the terms and conditions of the contract. In the event of conflict between a task order and the contract, the contract will take precedence.

4. PERFORMANCE OF SERVICES

- a. The Contractor shall commence performance of services on the date agreed to by the Contractor and the ordering activity.
- b. The Contractor agrees to render services only during normal working hours, unless otherwise agreed to by the Contractor and the ordering activity.

c. The ordering activity should include the criteria for satisfactory completion for each task in the Statement of Work or Delivery Order. Services shall be completed in a good and workmanlike manner.

d. Any Contractor travel required in the performance of IT Services must comply with the Federal Travel Regulation or Joint Travel Regulations, as applicable, in effect on the date(s) the travel is performed. Established Federal Government per diem rates will apply to all Contractor travel. Contractors cannot use GSA city pair contracts.

5. STOP-WORK ORDER (FAR 52.242-15) (AUG 1989)

(a) The Contracting Officer may, at any time, by written order to the Contractor, require the Contractor to stop all, or any part, of the work called for by this contract for a period of 90 days after the order is delivered to the Contractor, and for any further period to which the parties may agree. The order shall be specifically identified as a stop-work order issued under this clause. Upon receipt of the order, the Contractor shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the work covered by the order during the period of work stoppage. Within a period of 90 days after a stop-work is delivered to the Contractor, or within any extension of that period to which the parties shall have agreed, the Contracting Officer shall either-

(1) Cancel the stop-work order; or

(2) Terminate the work covered by the order as provided in the Default, or the Termination for Convenience of the Government, clause of this contract.

(b) If a stop-work order issued under this clause is canceled or the period of the order or any extension thereof expires, the Contractor shall resume work. The Contracting Officer shall make an equitable adjustment in the delivery schedule or contract price, or both, and the contract shall be modified, in writing, accordingly, if-

(1) The stop-work order results in an increase in the time required for, or in the Contractor's cost properly allocable to, the performance of any part of this contract; and

(2) The Contractor asserts its right to the adjustment within 30 days after the end of the period of work stoppage; provided, that, if the Contracting Officer decides the facts justify the action, the Contracting Officer may receive and act upon the claim submitted at any time before final payment under this contract.

(c) If a stop-work order is not canceled and the work covered by the order is terminated for the convenience of the Government, the Contracting Officer shall allow reasonable costs resulting from the stop-work order in arriving at the termination settlement.

(d) If a stop-work order is not canceled and the work covered by the order is terminated for default, the Contracting Officer shall allow, by equitable adjustment or otherwise, reasonable costs resulting from the stop-work order.

6. INSPECTION OF SERVICES

In accordance with FAR 52.212-4 CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (MAR 2009) (DEVIATION I - FEB 2007) for Firm-Fixed Price orders and FAR 52.212-4 CONTRACT TERMS AND CONDITIONS -COMMERCIAL ITEMS (MAR 2009) (ALTERNATE I - OCT 2008) (DEVIATION I - FEB 2007) applies to Time-and-Materials and Labor-Hour Contracts orders placed under this contract.

7. RESPONSIBILITIES OF THE CONTRACTOR

The Contractor shall comply with all laws, ordinances, and regulations (Federal, State, City, or otherwise) covering work of this character. If the end product of a task order is software, then FAR 52.227-14 (Dec 2007) Rights in Data - General, may apply.

8. RESPONSIBILITIES OF THE ORDERING ACTIVITY

Subject to security regulations, the ordering activity shall permit Contractor access to all facilities necessary to perform the requisite IT Professional Services.

9. INDEPENDENT CONTRACTOR

All IT Professional Services performed by the Contractor under the terms of this contract shall be as an independent Contractor, and not as an agent or employee of the ordering activity.

10. ORGANIZATIONAL CONFLICTS OF INTEREST

a. Definitions.

“Contractor” means the person, firm, unincorporated association, joint venture, partnership, or corporation that is a party to this contract.

“Contractor and its affiliates” and “Contractor or its affiliates” refers to the Contractor, its chief executives, directors, officers, subsidiaries, affiliates, subcontractors at any tier, and consultants and any joint venture involving the Contractor, any entity into or with which the Contractor subsequently merges or affiliates, or any other successor or assignee of the Contractor.

An “Organizational conflict of interest” exists when the nature of the work to be performed under a proposed ordering activity contract, without some restriction on ordering activities by the Contractor and its affiliates, may either (i) result in an unfair competitive advantage to the Contractor or its affiliates or (ii) impair the Contractor’s or its affiliates’ objectivity in performing contract work.

b. To avoid an organizational or financial conflict of interest and to avoid prejudicing the best interests of the ordering activity, ordering activities may place restrictions on the Contractors, its affiliates, chief executives, directors, subsidiaries and subcontractors at any tier when placing orders against schedule contracts. Such restrictions shall be consistent with FAR 9.505 and shall be designed to avoid, neutralize, or mitigate organizational conflicts of interest that might otherwise exist in situations related to individual orders placed against the schedule contract. Examples of situations, which may require restrictions, are provided at FAR 9.508.

11. INVOICES

The Contractor, upon completion of the work ordered, shall submit invoices for IT Professional services. Progress payments may be authorized by the ordering activity on individual orders if appropriate. Progress payments shall be based upon completion of defined milestones or interim products. Invoices shall be submitted monthly for recurring services performed during the preceding month.

12. PAYMENTS

For firm-fixed price orders the ordering activity shall pay the Contractor, upon submission of proper invoices or vouchers, the prices stipulated in this contract for service rendered and accepted. Progress payments shall be made only when authorized by the order. For time-and-materials orders, the Payments under Time-and-Materials and Labor-Hour Contracts at FAR 52.212-4 (MAR 2009) (ALTERNATE I – OCT 2008) (DEVIATION I – FEB 2007) applies to time-and-materials orders placed under this contract. For labor-hour orders, the Payment under Time-and-Materials and Labor-Hour Contracts at FAR 52.212-4 (MAR 2009) (ALTERNATE I – OCT 2008) (DEVIATION I – FEB 2007) applies to labor-hour orders placed under this contract. 52.216-31(Feb 2007) Time-and-Materials/Labor-Hour Proposal Requirements—Commercial Item Acquisition As prescribed in 16.601(e)(3), insert the following provision:

(a) The Government contemplates award of a Time-and-Materials or Labor-Hour type of contract resulting from this solicitation.

(b) The offeror must specify fixed hourly rates in its offer that include wages, overhead, general and administrative expenses, and profit. The offeror must specify whether the fixed hourly rate for each labor category applies to labor performed by—

- (1) The offeror;
- (2) Subcontractors; and/or
- (3) Divisions, subsidiaries, or affiliates of the offeror under a common control.

13. RESUMES

Resumes shall be provided to the GSA Contracting Officer or the user ordering activity upon request.

14. INCIDENTAL SUPPORT COSTS

Incidental support costs are available outside the scope of this contract. The costs will be negotiated separately with the ordering activity in accordance with the guidelines set forth in the FAR.

15. APPROVAL OF SUBCONTRACTS

The ordering activity may require that the Contractor receive, from the ordering activity's Contracting Officer, written consent before placing any subcontract for furnishing any of the work called for in a task order.

16. DESCRIPTION OF IT PROFESSIONAL SERVICES AND PRICING

a. The Contractor shall provide a description of each type of IT Service offered under Special Item Numbers 132-51 IT Professional Services should be presented in the same manner as the Contractor sells to its commercial and other ordering activity customers. If the Contractor is proposing hourly rates, a description of all corresponding commercial job titles (labor categories) for those individuals who will perform the service should be provided.

b. Pricing for all IT Professional Services shall be in accordance with the Contractor's customary commercial practices; e.g., hourly rates, monthly rates, term rates, and/or fixed prices, minimum general experience and minimum education.

The following is an example of the manner in which the description of a commercial job title should be presented:

EXAMPLE: Commercial Job Title: System Engineer

Minimum/General Experience: Three (3) years of technical experience which applies to systems analysis and design techniques for complex computer systems. Requires competence in all phases of systems analysis techniques, concepts and methods; also requires knowledge of available hardware, system software, input/output devices, structure and management practices.

Functional Responsibility: Guides users in formulating requirements, advises alternative approaches, conducts feasibility studies.

Minimum Education: Bachelor's Degree in Computer Science

About Info-Tech Research Group

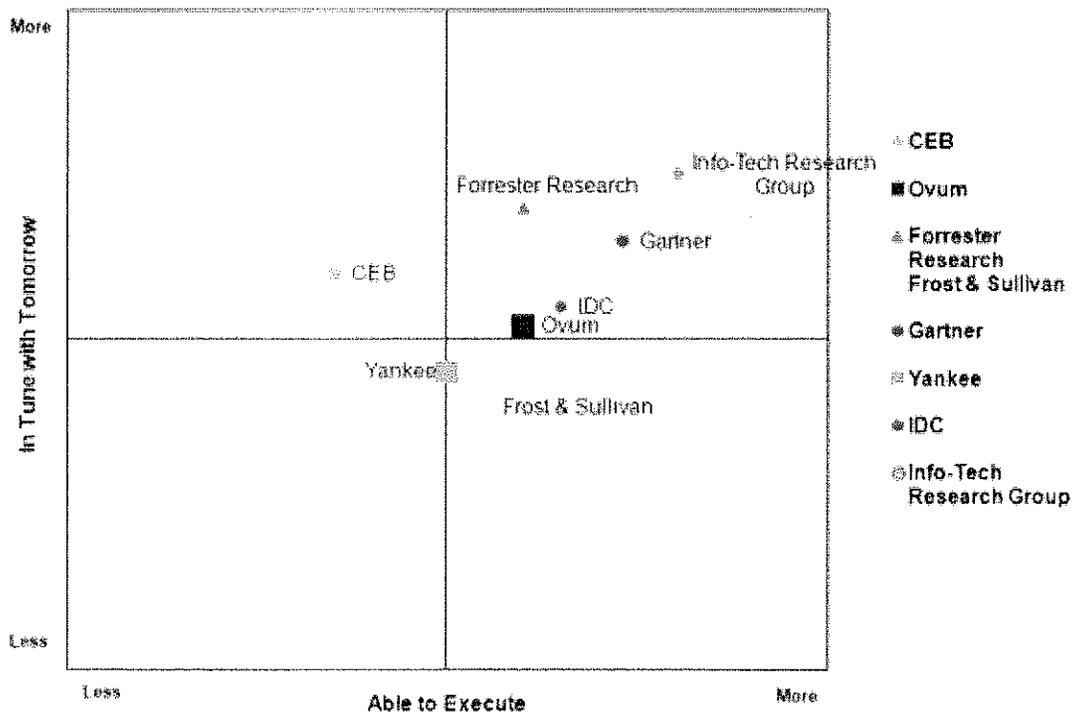
Info-Tech Research Group Inc. (Info-Tech) is a research and advisory firm providing practical solutions to IT challenges via executable research, tools and advice that have a clear and direct impact on your business. Our services include research and advisory memberships, best practice development programs, and consulting services.

Together, these services help you work more effectively, make better decisions, align IT strategy to your business' goals and reduce IT risk. Our comprehensive solutions include tools and templates to support your IT initiatives, providing immediate practical application for measurable results. Info-Tech creates complete solutions that supply the tools you need to get each project done right.

Research Industry Benchmarks

Outsell, Inc. (an independent market research firm) conducts an annual evaluation of the Information Market. Consistently, their results place us as a rising star in terms of our "ability to execute" and on being "in tune with tomorrow". Outsell positioned us above Gartner, Forrester and IDC.

In 2010, Info-Tech became the 8th largest IT research firm in the world. More than 8,000 organizations use our services, and we are committed to providing independent guidance and effective advice to our clients.



Membership

Team Access

Most Info-Tech memberships are based on a team licensing model that allows access for all IT staff.

Team membership enable as many members of the IT team as desired, to each have their own access and personal customer service support. The number of users, is scalable and flexible throughout the membership term.

Making our research available via a team model results in:

- **Improved productivity.** Each team member will spend less time hunting for tools and resources to get things done when they can rely on their Info-Tech membership to provide comprehensive solutions specific to the project at hand.
- **Easier knowledge sharing and training.** Processes and best practices can be readily applied by all team members, making it simple to pick up where someone else leaves off.
- **Consistent access to our tools and resources.** Keeping everyone on the same page can be a challenge; providing your entire team with access to our research ensures that proven methodologies and effective tools can be applied throughout the department.

Solution Sets

Info-Tech research is created using a tool-based model that incorporates analysis, advice and the tools you need to get things done. You get access to:

Practical tools and resources packaged in **Solution Sets**:

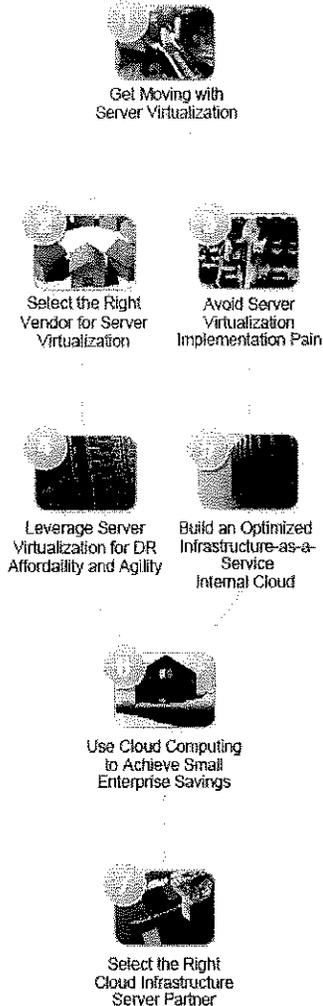
- Step-by-step, task-focused guidance for every project
- All of the tools required to complete the project, in one location
- **Solution Maps** that connect the tasks within the context of the project, so you can jump in at any point and easily find the right tools

In the **Solution Map**, we take a holistic view of a project, break it down into individual tasks, and then address those tasks from your point of view.

This unique approach to IT research provides you with the knowledge you require to make critical decisions paired with the tools you need to get the job done.

Sample Solution Map and Sets
 Example taken from [server and storage virtualization](#):

**IT Needs
 Solution Road Map**



Solution Sets

Get Moving with Server Virtualization
 Save money while building an agile, efficient and resilient server infrastructure.

Included in Solution Set: 1 PowerPoint, 1 note, 1 video and 3 tools.

[Enter Solution Set](#)

Select the Right Vendor for Server Virtualization

VMware continues to dominate but Citrix and now Microsoft offer viable alternatives.

Included in Solution Set: 1 PowerPoint, 10 Notes, and 1 Video

[Enter Solution Set](#)

Avoid Server Virtualization Implementation Pain

Virtualization is not a magic bullet. Poor scoping of infrastructure and business needs will lead to implementation pain.

Included in Solution Set: 1 PowerPoint, 2 Notes, 1 Tool

[Enter Solution Set](#)

Leverage Server Virtualization for DR Affordability and Agility

Virtualization is not just for consolidation - drive cost and complexity out of system availability and restore.

Included in Solution Set: 1 PowerPoint, 1 Video, and 6 Notes

[Enter Solution Set](#)

Build an Optimized Infrastructure-as-a-Service Internal Cloud

The best computing cloud is the one you've already started with server virtualization.

Included in Solution Set: 1 PowerPoint, 4 notes, 3 videos

[Enter Solution Set](#)

In the above example, the Solution Map comprises seven unique Solution Sets.

These Solution Sets provide you with comprehensive packages of advice and tools to walk you through the key challenges you face, including:

- **Executive presentations** of all of our key recommendations

- Communicate effectively with your own stakeholders
- **Supporting data and case studies** from the Info-Tech global network
 - Leverage your peers' best practices
- **Decision tools, templates, and polices**
 - Get the job done today
- **Video summaries** of our point of view and analysis
 - Keep your team up-to-speed easily using our subject matter experts

Up to three new Solution Sets are published each week to provide you with coverage of the IT issues you're facing on a daily basis.

Application Silo

- *Application Management & Governance*
 - Applications Portfolio Management
 - Project and Portfolio Management
- *Application/Web Development & Maintenance*
 - Application Planning & Design
 - Application Development
 - Application Testing & Deployment
 - Application Maintenance
 - Application Methodologies, Environments, Tools, & Techniques
- *Systems Integration*
 - Data Integration & Data Management
 - Application Integration
 - Business Process, Workflow & Forms Automation
 - B2B/E-commerce
- *Enterprise Applications*
 - Business Intelligence & Analytics
 - Collaboration & Productivity Applications
 - CRM Suites
 - Content & Document Management
 - ERP
 - Human Resource Applications
 - Sales, Marketing, and Customer Service Apps

Infrastructure Silo

- *Infrastructure Management and Governance*
 - Outsourcing/Shared & Managed Services
 - Capacity Planning & Management
 - Facilities
 - Project and Portfolio Management
- *Servers and Storage*
 - Server Platforms/Operating Systems
 - High Availability
 - Enterprise Databases
 - Server & Storage Virtualization
 - Server Hardware
 - Storage
- *Desktop & Mobile Devices*
 - Desktop & Mobile Infrastructure
 - Desktop Virtualization
 - Peripherals

- *Enterprise Networks*
 - Enterprise LANs, WANs, & Wireless
 - Remote & Mobile Connectivity
 - Network Carrier Services
- *Voice & Video*
 - Unified Communications
 - Telephony & VOIP
 - Video
- *Risk Management*
 - Disaster Recovery Planning
 - Security Policy and Process
 - Security Management Technologies
 - Network & Physical Security
 - Data Security
- *IT Service Management*
 - ITSM/Problem, Incident, & Change Management
 - Help & Service Desk
 - Availability & Performance Management

IT Strategy & Leadership Silo

The IT Strategy & Leadership Silo is available to Silver and Gold members. The following research topics are covered in the IT Strategy & Leadership silo:

- *Leadership & Performance Management*
 - Demand & Resource Planning
 - IT Management & Leadership
 - IT Training
 - IT Job Descriptions
 - IT Staff Performance Management & Development
 - Knowledge, Intelligence and Behavior Management
 - Organizational Design
- *Risk Management*
 - Legislation, Regulation & Compliance
 - Security and Business Continuity Planning
- *Service Delivery & Management*
 - Applications Delivery and Management
 - IT as a Service Portfolio
 - Infrastructure Delivery & Management
 - Outsourcing
 - Project Management & Governance
 - Vendor & Contract Management
- *Strategy & Governance*
 - Annual Planning & Budgeting
 - Enterprise Architecture
 - IT Strategy & Alignment
 - IT in a Merger or Acquisition
 - Policies Definition and Compliance
 - Stakeholder Management
 - Standards Definition and Compliance
- *Value Creation & Measurement*
 - Business Process Design & Development
 - Financial/Cost Management
 - IT Accountability

- IT Assessment/Diagnostic
- IT Innovation
- Performance Measurement & Communication
- Stakeholder Business Value

Analyst Access

Personal Advisory Services, included with Silver and Gold Membership

Personal Advisory Services are included with Silver (3 named users) and Gold (all named users) memberships. This service gives you unlimited access to the expertise of our entire team of analysts via phone, email or customized research briefs.

Rely on our experienced Analysts for answers when you:

- Want an objective third party to review a contract prior to making a technology purchase (e.g. Microsoft licensing, telecom pricing, Cisco pricing)
- Need to validate your decisions or discuss the best direction for an IT project
- Want assistance getting the buy-in from other members of your organization
- Require an objective third-party to answer your IT/management questions

You can talk to our analysts about any business/IT situation.

Your account manager works with you to understand your situation and the issues you would like addressed throughout the year. For each call or email interaction, they will pair you with the Analyst who will be the most beneficial, knowledgeable and experienced based on your specific circumstances. Your analyst will continue to monitor your progress and touch base with you throughout the duration of your project to ensure that you are getting the results you expect.

Member access includes the following:

1. Telephone consultations with our analysts (unlimited)
2. Email interactions with an analyst concerning your IT, business and/or strategy concerns

Enterprise Advisory Services (EAS), 10 units included with Gold membership

Members seeking help to build documentation or discover custom answers beyond a call or e-mail can purchase Enterprise Advisory Services. Ten introductory units are available with a Gold membership. Our research team will apply the methodologies we use in producing our research to create custom deliverables based on your specific needs.

Deliverables we've created recently for Enterprise Advisory clients include:

1. **Vendor shortlists**, including vendor briefings, market awareness, and secondary research.

2. **Practices discovery.** We can work with a client and its peers (as defined by criteria the client supplies) to discover staffing, salary, organizational, and budget benchmarks as well as common and best practices.
3. **RFP/RFI/RFQ creation.** Our analysts will help you create a "Request for Proposal" document that meets your needs.
4. **Document review and commentary,** including strategies, policies, RFPs, vendor responses to RFPs. We produce a written response highlighting changes needed and offering guidance and insight.
5. **Benchmarking (MeasureIT) customization.** While MeasureIT provides clients with some tools to narrow their peer group, we can customize the reports to align with additional variables that the client specifies.

Contract Review

Sometimes it takes an expert review to identify any shortcomings or unnecessary costs. Our analysts will review your IT product or services contract to ensure you are getting the best deal. Our contract review offerings will help you save money on your biggest technology purchases.

Most team memberships include one-on-one analyst access to discuss your particular situation (licensing) or proposed purchase. We conduct a thorough review and help you optimize spending and eliminate redundancies. Talk to one of our analysts to make sure you're not overspending the next time you make a purchase or renew a licensing agreement.

MeasureIT

MeasureIT is a customized peer benchmarking program that compares your budget and staffing with those of your peers, including companies in similar industries and of similar size. It generates your results immediately, for instant access to over 100 metrics that can help you justify your spending and staffing requests.

MeasureIT will help you:

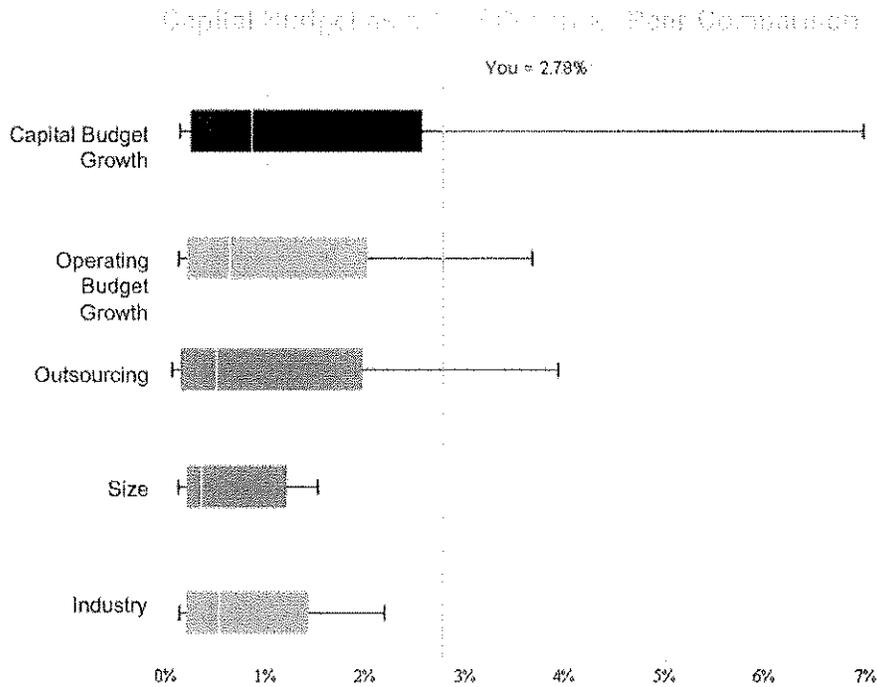
- Justify your spending with valuable budget data customized to your company
- Compare your staffing practices with those of your peers to see if your department is in line with those at similar organizations
- Access (in one convenient program) over 100 custom metrics that are impossible to find anywhere else

For example, one of the metrics included in the MeasureIT budget benchmark report is "Capital Budget as a Percentage of Revenue". You can see, at a glance, how your relative spending level compares to other organizations with similar:

- Growth in capital budget
- Growth in operating budget
- Involvement in outsourcing
- Size based on revenue
- Industry

Sample MeasureIT Benchmark Results

Example taken from: Instant IT Benchmarks: [MeasureIT for Budgeting](#)



OptimizeIT

OptimizeIT is a best practices development system for core IT functions, and it is a key component of your membership. It provides programs designed to help you dramatically improve your IT operations, processes and resource management. OptimizeIT will help you efficiently use your scarce resources by showing you the steps to take and providing the tools you need to streamline your core IT functions. It covers:

1. Project Management

- Project Prioritization
- PM Lite
- Project Portfolio Monitoring

2. IT Strategy and Planning

- IT Strategy

3. IT Resource Management

- Talent Management
- Vendor Management

4. Applications Management

- Application Maintenance

5. IT Governance

- Policy and Procedure Management

6. Risk Management

- IT Continuity Planning
- Compliance
- Security

Predicting the Future written by Mark Anderson, included with Silver and Gold Memberships in Medium, Large and Enterprise Segments

Mark Anderson, Info-Tech Research Fellow and CEO of Strategic News Service™, writes the most accurate predictive reports covering the computing and communications industries. This weekly newsletter covers must-have information for strategy development and business technology planning. Silver and Gold Memberships in Medium, Large and Enterprise segments include 3 named users for the Predicting the Future content.

Pricing and Features

Team Access Pricing Guidelines

Membership types for each customer are determined by the customer's segment. Segment is defined by the total number of full-time equivalent (FTE) IT staff employed by the enterprise including all locations, divisions, departments and business units (verified at time of purchase).

Each physical business location (a "site") must purchase their own membership which will reflect the segment applicable to the total FTE IT staff in the entire enterprise. Memberships are not based solely on the number of staff at the actual site, or department/division or business unit within a physical location. Customers purchasing a membership may not add IT staff to their membership that are not based at the physical address provided, unless previously agreed upon by Info-Tech Research Group. Memberships that cover multiple business locations, and/or departments, and/or divisions and/or subsidiaries/parent companies are available, but will be considered "open market" and quoted on a customized basis. Organizations with more than 100 IT staff fit in the Enterprise segment and will be quoted on a customized basis.

Where an organization has several divisions, departments or business units at a single location, each business unit or division must purchase their own team membership or purchase a custom license. Once purchased, the customer may determine how many members of the staff at their site will have login access and receive email distribution of research content.

Where a customer outsources a significant portion of IT functions, Info-Tech will determine segment based on data such as annual revenue, number of staff, number of business locations, and complexity of technology operations.

Customers who are consultants, or whose primary business is consulting may only purchase a Medium, Large, or Enterprise site license regardless of whether the number of IT staff is less than 10.

Info-Tech reserves the right to determine what constitutes a site, and to apply a segment to the customer for the purposes of determining the license available for purchase.

Bronze Membership

Bronze membership includes team access to the following following features:

- Application Silo
- Infrastructure Silo
- MeasureIT
- OptimizeIT

Info-Tech Segment	# of IT Staff	BRONZE GSA Discount
Small A	1 to 5	\$1,560
Small B	6 to 10	\$2,210
Medium	11 to 25	\$7,085
Large	26 to 100	\$10,725

Silver Membership

Silver membership includes team access to the following following features:

- Application Silo
- Infrastructure Silo
- MeasureIT
- OptimizeIT
- 3 named users for the IT Strategy & Leadership Silo and Personal Advisory Services
- For Medium, Large and Enterprise: 3 named users for Mark Anderson’s Predicting the Future content

Info-Tech Segment	# of IT Staff	SILVER GSA Discount
Small A	1 to 5	\$3,575
Small B	6 to 10	\$4,225
Medium	11 to 25	\$10,335
Large	26 to 100	\$14,885

Gold Membership

Gold membership includes team access to the following following features:

- Application Silo
- Infrastructure Silo
- MeasureIT
- OptimizeIT
- All users have access to IT Strategy & Leadership Silo and Personal Advisory Services
- For Medium, Large and Enterprise: 3 named users for Mark Anderson's Predicting the Future content
- 10 Enterprise Advisory units for custom research

Info-Tech Segment	# of IT Staff	GOLD GSA Discount
Small A	1 to 5	\$4,875
Small B	6 to 10	\$5,525
Medium	11 to 25	\$12,935
Large	26 to 100	\$21,385

Comparison of Team Memberships at a Glance

Outlined below is a table showing all of the Team Membership options available under GSA and what is included in each.

Feature/Service Comparison			
Access	Bronze Team	Silver Team	Gold Team
Application Silo	✓	✓	✓
Infrastructure Silo	✓	✓	✓
Tactical Toolsets	✓	✓	✓
MeasureIT	✓	✓	✓
OptimizeIT	✓	✓	✓
Contract Review	✓	✓	✓
Usage Reports On Demand	✓	✓	✓
Predicting the Future Reports		Three users	Three users
IT Strategy and Leadership Silo		Three users	Unlimited
Personal Advisory Services (Analyst Access by Phone and Email)		Three users	Unlimited
Enterprise Advisory Services			10 units

Individual Access

There are four types of single (Individual Access) ITA Premium Memberships available.

ITA Premium – Single Research Seat:

An ITA Premium – Single Research Seat includes access to the following features:

- Application Silo
- Infrastructure Silo
- MeasureIT
- OptimizeIT

Info-Tech Segment	# of IT Staff	Single Membership GSA Discount
Medium	11 to 25	\$3,695
Large	26 to 100	\$3,695
Enterprise	100+	\$3,695

ITA Premium – Single Advisory Seat

An ITA Premium – Single Advisory Seat includes:

- Full access to the ITA Premium – Research Membership (as outlined above),
- Unlimited phone consultations with our Research Analysts (Personal Advisory Service)

Info-Tech Segment	# of IT Staff	Single Membership GSA Discount
Medium	11 to 25	\$9,075
Large	26 to 100	\$9,075
Enterprise	100+	\$9,075

ITA Premium Small Enterprise – Single Research Seat

The same comprehensive coverage of the issues as ITA Premium. If you work in an organization with total IT staff of less than 10 (and serve under 200 end-users), an ITA Premium - Small Enterprise membership provides clear, concise answers and tools connected in ways that make your job easier.

An ITA Premium Small Enterprise – Single Research Seat includes access to the following features:

- Application Silo
- Infrastructure Silo
- MeasureIT
- OptimizeIT

Info-Tech Segment	# of IT Staff	Single Membership GSA Discount
Small A	1 to 5	\$840

Small B	6 to 10	\$840
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ITA Premium Small Enterprise – Single Advisory Seat

An ITA Premium Small Enterprise – Single Advisory Seat Includes:

- Full access to the ITA Premium Small Enterprise – Research Membership (as outlined above)
- Unlimited phone consultations with our Research Analysts (Personal Advisory Service)

Info-Tech Segment	# of IT Staff	Single Membership GSA Discount
Small A	1 to 5	\$4,635
Small B	6 to 10	\$4,635

Service Details

Accessing Info-Tech Services

Our Services include an easy to administrate access model that will allow maximum access by IT team members. Each Research Member is assigned a username and password and receives a new user tour upon registration.

The Services are provided via the Web using, as a minimum, Internet Explorer 6 and Mozilla Firefox 2.x Web browsers for a Windows environment. All of our online downloads are available in MS Office formats, PDF or Zip files containing the same formats.

We have clients in a wide variety of locations and time zones, and we accommodate them based on the times that are common to our respective time zones. Our analysts work from 9:00 am to 5:00 pm Eastern Time for telephone consultations.

Analysts are available at their earliest opportunity, but due to the amount of preparation involved, a minimum of 24 hours lead time is required. Generally, if there are no travel complications, analysts are available within 2-3 business days of the request.

Dedicated Account Management

Our clients have a dedicated Senior Account Manager to manage service delivery to your enterprise on a regional and national level. You will also be assigned a customer service representative who can assist with research requests and site usage.

Your account manager and customer service representative are available from 08:00 a.m. to 5:00 p.m. (Eastern Time), Monday to Friday. Customer service is also available online using the Live Chat function of our website.

This dedicated service can be used to:

- Make account inquiries, including adding or deleting members on your account
- Obtain help locating specific research
- Gain assistance using all membership resources

**USA COMMITMENT TO PROMOTE
SMALL BUSINESS PARTICIPATION
PROCUREMENT PROGRAMS**

PREAMBLE

Info-Tech Research Group Inc. provides commercial products and services to ordering activities. We are committed to promoting participation of small, small disadvantaged and women-owned small businesses in our contracts. We pledge to provide opportunities to the small business community through reselling opportunities, mentor-protégé programs, joint ventures, teaming arrangements, and subcontracting.

COMMITMENT

To actively seek and partner with small businesses.

To identify, qualify, mentor and develop small, small disadvantaged and women-owned small businesses by purchasing from these businesses whenever practical.

To develop and promote company policy initiatives that demonstrate our support for awarding contracts and subcontracts to small business concerns.

To undertake significant efforts to determine the potential of small, small disadvantaged and women-owned small business to supply products and services to our company.

To insure procurement opportunities are designed to permit the maximum possible participation of small, small disadvantaged, and women-owned small businesses.

To attend business opportunity workshops, minority business enterprise seminars, trade fairs, procurement conferences, etc., to identify and increase small businesses with whom to partner.

To publicize in our marketing publications our interest in meeting small businesses that may be interested in subcontracting opportunities.

We signify our commitment to work in partnership with small, small disadvantaged and women-owned small businesses to promote and increase their participation in ordering activity contracts. To accelerate potential opportunities please contact Davin Juusola, (519) 432-3550, djuusola@infotech.com, fax: (519) 432-2506

BEST VALUE
BLANKET PURCHASE AGREEMENT
FEDERAL SUPPLY SCHEDULE

(Insert Customer Name)

In the spirit of the Federal Acquisition Streamlining Act (ordering activity) and (Info-Tech Research Group Inc.) enter into a cooperative agreement to further reduce the administrative costs of acquiring commercial items from the General Services Administration (GSA) Federal Supply Schedule Contract(s) _____.

Federal Supply Schedule contract BPAs eliminate contracting and open market costs such as: search for sources; the development of technical documents, solicitations and the evaluation of offers. Teaming Arrangements are permitted with Federal Supply Schedule Contractors in accordance with Federal Acquisition Regulation (FAR) 9.6.

This BPA will further decrease costs, reduce paperwork, and save time by eliminating the need for repetitive, individual purchases from the schedule contract. The end result is to create a purchasing mechanism for the ordering activity that works better and costs less.

Signatures

Ordering Activity

Date

Info-Tech Research Group Inc. Date

BPA NUMBER _____

**(CUSTOMER NAME)
BLANKET PURCHASE AGREEMENT**

Pursuant to GSA Federal Supply Schedule Contract Number(s) _____, Blanket Purchase Agreements, the Contractor agrees to the following terms of a Blanket Purchase Agreement (BPA) EXCLUSIVELY WITH (ordering activity):

(1) The following contract items can be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the contract, except as noted below:

MODEL NUMBER/PART NUMBER	*SPECIAL BPA DISCOUNT/PRICE
_____	_____
_____	_____
_____	_____

(2) Delivery:

DESTINATION	DELIVERY SCHEDULES / DATES
_____	_____
_____	_____
_____	_____

(3) The ordering activity estimates, but does not guarantee, that the volume of purchases through this agreement will be _____.

(4) This BPA does not obligate any funds.

(5) This BPA expires on _____ or at the end of the contract period, whichever is earlier.

(6) The following office(s) is hereby authorized to place orders under this BPA:

OFFICE	POINT OF CONTACT
_____	_____
_____	_____
_____	_____

(7) Orders will be placed against this BPA via Electronic Data Interchange (EDI), FAX, or paper.

(8) Unless otherwise agreed to, all deliveries under this BPA must be accompanied by delivery tickets or sales slips that must contain the following information as a minimum:

- (a) Name of Contractor;
- (b) Contract Number;
- (c) BPA Number;
- (d) Model Number or National Stock Number (NSN);
- (e) Purchase Order Number;
- (f) Date of Purchase;

(g) Quantity, Unit Price, and Extension of Each Item (unit prices and extensions need not be shown when incompatible with the use of automated systems; provided, that the invoice is itemized to show the information); and

(h) Date of Shipment.

(9) The requirements of a proper invoice are specified in the Federal Supply Schedule contract. Invoices will be submitted to the address specified within the purchase order transmission issued against this BPA.

(10) The terms and conditions included in this BPA apply to all purchases made pursuant to it. In the event of an inconsistency between the provisions of this BPA and the Contractor's invoice, the provisions of this BPA will take precedence.

**BASIC GUIDELINES FOR USING
“CONTRACTOR TEAM ARRANGEMENTS”**

Federal Supply Schedule Contractors may use “Contractor Team Arrangements” (see FAR 9.6) to provide solutions when responding to a ordering activity requirements.

These Team Arrangements can be included under a Blanket Purchase Agreement (BPA). BPAs are permitted under all Federal Supply Schedule contracts.

Orders under a Team Arrangement are subject to terms and conditions of the Federal Supply Schedule Contract.

Participation in a Team Arrangement is limited to Federal Supply Schedule Contractors.

Customers should refer to FAR 9.6 for specific details on Team Arrangements.

Here is a general outline on how it works:

- The customer identifies their requirements.
- Federal Supply Schedule Contractors may individually meet the customers needs, or -
- Federal Supply Schedule Contractors may individually submit a Schedules “Team Solution” to meet the customer’s requirement.
- Customers make a best value selection.