



## Documents and Records Management

Solicitation Number # 36-22

Proposal Response

National Cooperative Purchasing Alliance  
Houston, TX

Due Date: November 17, 2022 2:00 PM CT

**Submitted to:**



National Cooperative Purchasing Alliance  
P.O. Box 701273  
Houston, TX 77270

**Submitted by:**

Global Solutions Group, Inc.



25900 Greenfield Road, Suite 220  
Oak Park, MI 48237  
[www.GlobalSolGroup.com](http://www.GlobalSolGroup.com)



This proposal contains proprietary information that shall not be duplicated, used, or disclosed for any reason other than evaluation of the proposal. If release is required due to transparency requirements, all information regarding performance methodology, pricing methodology, other items that are considered trade secrets and any Personally Identifiable Information must be redacted.



**Offeror**

Global Solutions Group, Inc.  
25900 Greenfield Road, Suite 220  
Oak Park, MI 48237  
[www.GlobalSolGroup.com](http://www.GlobalSolGroup.com)

**CAGE** 6M9L5  
**DUNS** 078343325  
**EIN** 20 0010736



**Contracting Vehicles**

<b>GSA</b>	<b>Multiple Award Schedule</b> Contract # GS-35F-171AA <small>(Formerly Schedule 70)</small>	 Contract # 47QTCB21D0281
<b>GSA</b>	<b>Multiple Award Schedule</b> Contract # GS-02F-025GA <small>(Formerly Schedule 736)</small>	
<b>GSA</b>	<b>Multiple Award Schedule</b> Contract # GS-03F-132DA <small>(Formerly Schedule 36)</small>	

**Persons authorized to negotiate with the Government and sign the proposal and subsequent award on Offeror's behalf:**

Lisa Salvador, Vice President  
Direct: (248) 291-5440  
Mobile: (313) 333-0188  
[lisas@globalsolgroup.com](mailto:lisas@globalsolgroup.com)

**Acknowledgement of Addenda, Questions and Answers, and other Modifications**  
NA

**Submit to:**



National Cooperative Purchasing Alliance  
P.O. Box 701273  
Houston, TX 77270

November 17, 2022

National Cooperative Purchasing Alliance  
 P.O. Box 701273  
 Houston, TX 77270

**Subject:** Global Solutions Group’s response to **RFP # 36-22 for Documents and Records Management for National Cooperative Purchasing Alliance.**

Dear Procurement Officer:

Global Solutions Group, Inc. (GSG) hereby presents our proposal to RFP # 36-22 for Documents and Records Management to National Cooperative Purchasing Alliance (“NCPA”).

GSG is a multifaceted technology company incorporated in the State of Michigan in 2003. We are headquartered in Oak Park, Michigan. **We are an SBA 8(a) Certified Small Business, Certified Women Owned Small Business (WOSB), Certified Minority Business Enterprise (MBE), and Economically Disadvantaged Woman - Owned Small Business (EDWOSB).**



GSG is an **ISO/IEC 27001:2013 Information Security Management Systems, ISO 9001:2015 Quality Management System, and ISO 20000:2018 - Service Management System Certified** firm.

Our team has the ability to consistently provide products and services that meet customer and applicable statutory and regulatory requirements.

GSG understands that the National Cooperative Purchasing Alliance (“NCPA”) is looking for qualified vendors for products or services for document and records management.









GSG provides Laserfiche solutions for a broad variety of applications including education, local, state, and federal government as well as health care, legal support and case management to fulfil member agency requirements. Laserfiche provides a framework in which a variety of technologies can work together to provide real-time integration. The Laserfiche web-based solution is compliant with Section 508 accessibility guidelines.

GSG is a certified **Value-Added Reseller for Laserfiche**, and our staff includes **Gold and Platinum Certified Laserfiche professionals**. GSG provides the ability to deploy multiple systems for production, testing, development, and training to meet high availability, disaster recovery, and changing development needs. GSG will fully comply with your requirements. GSG has the proficiency, experience, and ability to successfully install any size of Laserfiche system.

**Key Features of GSG Implemented DMS:**

- Enterprise Search Capacity Based on Metadata
- Easy Document Sharing and Routing
- DoD 5015.2 Certified Solution
- Automated Notifications
- Business Process Automation & Workflows
- Robust Reporting and Audit Capabilities
- Out-of-the-Box Integration with Microsoft-based Applications
- Customizable Integrations with Most Governance Applications
- Intuitive Interface

**Sectors We Serve**

- |   |               |   |                    |
|---|---------------|---|--------------------|
|  | Government    |  | Commercial         |
|  | Education     |  | Non-Profit         |
|  | Justice       |  | Financial Services |
|  | Manufacturing |  | Healthcare         |

Our team will provide a full functionality solution with on-premises implementation. GSG takes great pride in providing accurate and cost-effective Document Management Services (DMS) to city, state, and federal government agencies. We are currently providing DMS including scanning, digitization, storage, shredding, Electronic Content Management (ECM), and Electronic Document Management Systems (EDMS) to the U.S. Army, U.S. Air Force, and U.S. Marines, as well as to many local and city governments and educational institutions.



**GSG is a Value-Added Reseller (VAR) of Laserfiche**, and we provide Laserfiche licenses, installation, maintenance, support, and training services to the educational organizations and several agencies and consortiums including for city, state, and federal governments. As a Certified VAR, GSG has the requisite capability to upgrade, maintain, and sustain the software. We have access to the latest innovations in implementation, integration, and customization practices, and our team constantly takes advantage of opportunities to update and enhance their skill sets and knowledge. GSG provides comprehensive document management systems and services to municipal, state, and federal government agencies.

#### **Why GSG?**

- ***A Gold and Platinum Certified Value-Added Reseller (VAR)***
- ***Experienced and Certified Team Members***
- ***Dynamic, Flexible Document Management Solutions and Customization***
- ***Dedicated to Providing Cost-Effective, Secure Implementation***
- ***A Strong Reputation for Timely Support***
- ***Experience with Educational Institutions, City, State, and Federal Governments***

We agree with all terms, conditions, and provisions included in the solicitation document, and we agree to furnish all items at the price indicated for each item. We take no exceptions to the contract terms and conditions. We offer Texans Can our experience and strong corporate support.

***GSG provides Laserfiche Electronic Document Management/Workflow Software to the Fort Worth Housing Solutions, Texas. This contract includes terms that extend pricing for Laserfiche Products to other agencies.***

#### **Point of Contact Details**

Name: Lisa Salvador  
Title: Vice President  
Email: [lisas@globalsolgroup.com](mailto:lisas@globalsolgroup.com)  
Telephone: (248) 291-5440 (office)  
(313) 333-0188 (mobile)

As Vice President of Global Solutions Group, Inc., I am fully authorized to negotiate and bind GSG during the period in which the NCPA is evaluating proposals. You may contact me at any time.

Regards,



Lisa Salvador  
Vice President

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# **Tab 1: Master Agreement / Signature Form**

# **TAB 1**

## **MASTER AGREEMENT - GENERAL TERMS AND CONDITIONS**

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### **Customer Support**

The vendor shall provide timely and accurate technical advice and sales support. The vendor shall respond to such requests within one (1) working day after receipt of the request.

### **Disclosures**

Respondent affirms that he/she has not given, offered to give, nor intends to give at any time hereafter any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor or service to a public servant in connection with this contract.

The respondent affirms that, to the best of his/her knowledge, the offer has been arrived at independently, and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give an unfair advantage over other vendors in the award of this contract.

### **Renewal of Contract**

Unless otherwise stated, all contracts are for a period of three (3) years with an option to renew for up to two (2) additional one-year terms or any combination of time equally not more than 2 years if agreed to by Region 14 ESC and the vendor.

### **Funding Out Clause**

Any/all contracts exceeding one (1) year shall include a standard "funding out" clause. A contract for the acquisition, including lease, of real or personal property is a commitment of the entity's current revenue only, provided the contract contains either or both of the following provisions:

Retains to the entity the continuing right to terminate the contract at the expiration of each budget period during the term of the contract and is conditioned on a best efforts attempt by the entity to obtain appropriate funds for payment of the contract.

### **Shipments (if applicable)**

The awarded vendor shall ship ordered products within seven (7) working days for goods available and within four (4) to six (6) weeks for specialty items after the receipt of the order unless modified. If a product cannot be shipped within that time, the awarded vendor shall notify the entity placing the order as to why the product has not shipped and shall provide an estimated shipping date. At this point the participating entity may cancel the order if estimated shipping time is not acceptable.

### **Tax Exempt Status**

Since this is a national contract, knowing the tax laws in each state is the sole responsibility of the vendor.

**Payments**

The entity using the contract will make payments directly to the awarded vendor or their affiliates (distributors/business partners/resellers) as long as written request and approval by NCPA is provided to the awarded vendor.

**Adding Authorized Distributors/Dealers**

Awarded vendors may submit a list of distributors/partners/resellers to sell under their contract throughout the life of the contract. Vendor must receive written approval from NCPA before such distributors/partners/resellers considered authorized.

Purchase orders and payment can only be made to awarded vendor or distributors/ business partners/resellers previously approved by NCPA.

Pricing provided to members by added distributors or dealers must also be less than or equal to the pricing offered by the awarded contract holder.

All distributors/partners/resellers are required to abide by the Terms and Conditions of the vendor's agreement with NCPA.

**Pricing**

All pricing submitted shall include the administrative fee to be remitted to NCPA by the awarded vendor. It is the awarded vendor's responsibility to keep all pricing up to date and on file with NCPA.

All deliveries shall be freight prepaid, F.O.B. destination and shall be included in all pricing offered unless otherwise clearly stated in writing

**Warranty**

Proposal should address the following warranty information:

- Applicable warranty and/or guarantees of equipment and installations including any conditions and response time for repair and/or replacement of any components during the warranty period.
- Availability of replacement parts
- Life expectancy of equipment under normal use
- Detailed information as to proposed return policy on all equipment

Products: Vendor shall provide equipment, materials and products that are new unless otherwise specified, of good quality and free of defects

Construction: Vendor shall perform services in a good and workmanlike manner and in accordance with industry standards for the service provided.

**Safety**

Vendors performing services shall comply with occupational safety and health rules and regulations. Also all vendors and subcontractors shall be held responsible for the safety of their employees and any conditions that may cause injury or damage to persons or property.



**Permits**

Since this is a national contract, knowing the permit laws in each state is the sole responsibility of the vendor.

**Indemnity**

The awarded vendor shall protect, indemnify, and hold harmless Region 14 ESC and its participants, administrators, employees and agents against all claims, damages, losses and expenses arising out of or resulting from the actions of the vendor, vendor employees or vendor subcontractors in the preparation of the solicitation and the later execution of the contract.

**Franchise Tax**

The respondent hereby certifies that he/she is not currently delinquent in the payment of any franchise taxes.

**Supplemental Agreements**

The entity participating in this contract and awarded vendor may enter into a separate supplemental agreement to further define the level of service requirements over and above the minimum defined in this contract i.e. invoice requirements, ordering requirements, specialized delivery, etc. Any supplemental agreement developed as a result of this contract is exclusively between the participating entity and awarded vendor.

**Certificates of Insurance**

Certificates of insurance shall be delivered to the Public Agency prior to commencement of work. The insurance company shall be licensed in the applicable state in which work is being conducted. The awarded vendor shall give the participating entity a minimum of ten (10) days notice prior to any modifications or cancellation of policies. The awarded vendor shall require all subcontractors performing any work to maintain coverage as specified.

**Legal Obligations**

It is the Respondent's responsibility to be aware of and comply with all local, state, and federal laws governing the sale of products/services identified in this RFP and any awarded contract and shall comply with all while fulfilling the RFP. Applicable laws and regulation must be followed even if not specifically identified herein.

**Protest**

A protest of an award or proposed award must be filed in writing within ten (10) days from the date of the official award notification and must be received by 5:00 pm CST. Protests shall be filed with Region 14 ESC and shall include the following:

- Name, address and telephone number of protester
- Original signature of protester or its representative
- Identification of the solicitation by RFP number
- Detailed statement of legal and factual grounds including copies of relevant documents and the form of relief requested

Any protest review and action shall be considered final with no further formalities being considered.

### **Force Majeure**

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

The term Force Majeure as employed herein, shall mean acts of God, strikes, lockouts, or other industrial disturbances, act of public enemy, orders and regulation of any kind of government of the United States or any civil or military authority; insurrections; riots; epidemics; pandemic; landslides; lighting; earthquake; fires; hurricanes; storms; floods; washouts; droughts; arrests; restraint of government and people; civil disturbances; explosions, breakage or accidents to machinery, pipelines or canals, or other causes not reasonably within the control of the party claiming such inability. It is understood and agreed that the settlement of strikes and lockouts shall be entirely within the discretion of the party having the difficulty, and that the above requirement that any Force Majeure shall be remedied with all reasonable dispatch shall not require the settlement of strikes and lockouts by acceding to the demands of the opposing party or parties when such settlement is unfavorable in the judgment of the party having the difficulty

### **Prevailing Wage**

It shall be the responsibility of the Vendor to comply, when applicable, with the prevailing wage legislation in effect in the jurisdiction of the purchaser. It shall further be the responsibility of the Vendor to monitor the prevailing wage rates as established by the appropriate department of labor for any increase in rates during the term of this contract and adjust wage rates accordingly.

### **Termination**

Either party may cancel this contract in whole or in part by providing written notice. The cancellation will take effect 30 business days after the other party receives the notice of cancellation. After the 30th business day all work will cease following completion of final purchase order.

### **Open Records Policy**

Because Region 14 ESC is a governmental entity responses submitted are subject to release as public information after contracts are executed. If a vendor believes that its response, or parts of its response, may be exempted from disclosure, the vendor must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, the respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s).

The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). Region 14 ESC must provide the OAG sufficient

information to render an opinion and therefore, vague and general claims to confidentiality by the respondent are not acceptable. Region 14 ESC must comply with the opinions of the OAG. Region14 ESC assumes no responsibility for asserting legal arguments on behalf of any vendor. Respondent are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.

## **PROCESS**

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Region 14 ESC will evaluate proposals in accordance with, and subject to, the relevant statutes, ordinances, rules, and regulations that govern its procurement practices. NCPA will assist Region 14 ESC in evaluating proposals. Award(s) will be made to the prospective vendor whose response is determined to be the most advantageous to Region 14 ESC, NCPA, and its participating agencies. To qualify for evaluation, response must have been submitted on time, and satisfy all mandatory requirements identified in this document.

### **Contract Administration**

The contract will be administered by Region 14 ESC. The National Program will be administered by NCPA on behalf of Region 14 ESC.

### **Contract Term**

The contract term will be for three (3) year starting from the date of the award. The contract may be renewed for up to two (2) additional one-year terms or any combination of time equally not more than 2 years.

It should be noted that maintenance/service agreements may be issued for up to (5) years under this contract even if the contract only lasts for the initial term of the contract. NCPA will monitor any maintenance agreements for the term of the agreement provided they are signed prior to the termination or expiration of this contract.

### **Contract Waiver**

Any waiver of any provision of this contract shall be in writing and shall be signed by the duly authorized agent of Region 14 ESC. The waiver by either party of any term or condition of this contract shall not be deemed to constitute waiver thereof nor a waiver of any further or additional right that such party may hold under this contract.

### **Price Increases**

Should it become necessary, price increase requests may be submitted at any point during the term of the contract by written amendment. Included with the request must be documentation and/or formal cost justification for these changes. Requests will be formally reviewed, and if justified, the amendment will be approved.

### **Products and Services Additions**

New Products and/or Services may be added to the resulting contract at any time during the term by written amendment, to the extent that those products and/or services are within the scope of this RFP.

### **Competitive Range**

It may be necessary for Region 14 ESC to establish a competitive range. Responses not in the competitive range are unacceptable and do not receive further award consideration.

### **Deviations and Exceptions**

Deviations or exceptions stipulated in response may result in disqualification. It is the intent of Region 14 ESC to award a vendor's complete line of products and/or services, when possible.

### **Estimated Quantities**

While no minimum volume is guaranteed, the estimated (but not limited to) annual volume for Products and Services purchased under the proposed Master Agreement is \$25 million dollars annually. This estimate is based on the anticipated volume of Region 14 ESC and current sales within the NCPA program.

### **Evaluation**

Region 14 ESC will review and evaluate all responses in accordance with, and subject to, the relevant statutes, ordinances, rules and regulations that govern its procurement practices. NCPA will assist the lead agency in evaluating proposals. Recommendations for contract awards will be based on multiple factors, each factor being assigned a point value based on its importance.

### **Formation of Contract**

A response to this solicitation is an offer to contract with Region 14 ESC based upon the terms, conditions, scope of work, and specifications contained in this request. A solicitation does not become a contract until it is accepted by Region 14 ESC. The prospective vendor must submit a signed Signature Form with the response thus, eliminating the need for a formal signing process. Contract award letter issued by Region 14 ESC is the counter-signature document establishing acceptance of the contract.

### **NCPA Administrative Agreement**

The vendor will be required to enter and execute the National Cooperative Purchasing Alliance Administration Agreement with NCPA upon award with Region 14 ESC. The agreement establishes the requirements of the vendor with respect to a nationwide contract effort.

### **Clarifications/Discussions**

Region 14 ESC may request additional information or clarification from any of the respondents after review of the proposals received for the sole purpose of elimination minor irregularities, informalities, or apparent clerical mistakes in the proposal. Clarification does not give respondent an opportunity to revise or modify its proposal, except to the extent that correction of apparent clerical mistakes results in a revision. After the initial receipt of proposals, Region 14 ESC reserves the right to conduct discussions with those respondent's whose proposals are determined to be reasonably susceptible of being selected for award. Discussions occur when oral or written communications between Region 14 ESC and respondent's are conducted for the purpose clarifications involving information essential for determining the acceptability of a proposal or that provides respondent an opportunity to revise or modify its proposal. Region 14 ESC will not assist respondent bring its proposal up to the level of other proposals through discussions. Region 14 ESC will not indicate to respondent a cost or price that it must meet to neither obtain further consideration nor will it provide any information about other respondents' proposals or prices.

**Multiple Awards**

Multiple Contracts may be awarded as a result of the solicitation. Multiple Awards will ensure that any ensuing contracts fulfill current and future requirements of the diverse and large number of participating public agencies.

**Past Performance**

Past performance is relevant information regarding a vendor's actions under previously awarded contracts; including the administrative aspects of performance; the vendor's history of reasonable and cooperative behavior and commitment to customer satisfaction; and generally, the vendor's businesslike concern for the interests of the customer.

## **EVALUATION CRITERIA**

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### **Pricing (40 points)**

#### Electronic Price Lists

- Products, Services, Warranties, etc. price list
- Prices listed will be used to establish both the extent of a vendor's product lines, services, warranties, etc. available from a particular bidder and the pricing per item.

### **Ability to Provide and Perform the Required Services for the Contract (25 points)**

- Product Delivery within participating entities specified parameters
- Number of line items delivered complete within the normal delivery time as a percentage of line items ordered.
- Vendor's ability to perform towards above requirements and desired specifications.
- Past Cooperative Program Performance
- Quantity of line items available that are commonly purchased by the entity.
- Quality of line items available compared to normal participating entity standards.

### **References and Experience (20 points)**

- A minimum of ten (10) customer references for product and/or services of similar scope dating within past 3 years
- Respondent Reputation in marketplace
- Past Experience working with public sector.
- Exhibited understanding of cooperative purchasing

### **Value Added Products/Services Description, (8 points)**

- Additional Products/Services related to the scope of RFP
- Marketing and Training
- Minority and Women Business Enterprise (MWBE) and (HUB) Participation
- Customer Service

### **Technology for Supporting the Program (7 points)**

- Electronic on-line catalog, order entry use by and suitability for the entity's needs
- Quality of vendor's on-line resources for NCPA members.
- Specifications and features offered by respondent's products and/or services

**1. Tab 1: Master Agreement / Signature Form**

**SIGNATURE FORM**

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The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this bid in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said bid have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

Prices are guaranteed: **120 days**

Global Solutions Group, Inc.  
 Company Name

25900 Greenfield Road, Suite 220  
 Address

Oak Park	Michigan	48237
City	State	Zip

248-291-5440	None
Telephone Number	Fax Number

lisas@globalsolgroup.com  
 Email Address

Lisa Salvador	Vice President
Printed Name	Position

  
 Authorized Signature



# **Tab 2: NCPA Administration Agreement**

## TAB 2 NCPA ADMINISTRATION AGREEMENT

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This Administration Agreement is made as of December 8, 2022, by and between National Cooperative Purchasing Alliance ("NCPA") and Global Solutions Group, Inc. ("Vendor").

### Recitals

WHEREAS, Region 14 ESC has entered into a certain Master Agreement dated December 8, 2022, referenced as Contract Number 01-160, by and between Region 14 ESC and Vendor, as may be amended from time to time in accordance with the terms thereof (the "Master Agreement"), for the purchase of Document and Records Management;

WHEREAS, said Master Agreement provides that any state, city, special district, local government, school district, private K-12 school, technical or vocational school, higher education institution, other government agency or nonprofit organization (hereinafter referred to as "public agency" or collectively, "public agencies") may purchase products and services at the prices indicated in the Master Agreement;

WHEREAS, NCPA has the administrative and legal capacity to administer purchases under the Master Agreement to public agencies;

WHEREAS, NCPA serves as the administrative agent for Region 14 ESC in connection with other master agreements offered by NCPA

WHEREAS, Region 14 ESC desires NCPA to proceed with administration of the Master Agreement;

WHEREAS, NCPA and Vendor desire to enter into this Agreement to make available the Master Agreement to public agencies on a national basis;

NOW, THEREFORE, in consideration of the payments to be made hereunder and the mutual covenants contained in this Agreement, NCPA and Vendor hereby agree as follows:

### General Terms and Conditions

- The Master Agreement, attached hereto as Exhibit 1 and incorporated herein by reference as though fully set forth herein, and the terms and conditions contained therein shall apply to this Administration Agreement except as expressly changed or modified by this Administration Agreement.
- NCPA shall be afforded all of the rights, privileges and indemnifications afforded to Region 14 ESC under the Master Agreement, and such rights, privileges and indemnifications shall accrue and apply with equal effect to NCPA under this Administration Agreement including, but not limited to, Contractor's obligation to provide appropriate insurance and certain indemnifications to Region 14 ESC.

- Contractor shall perform all duties, responsibilities and obligations required under the Master Agreement in the time and manner specified by the Master Agreement.
- NCPA shall perform all of its duties, responsibilities, and obligations as administrator of purchases under the Master Agreement as set forth herein, and Contractor acknowledges that NCPA shall act in the capacity of administrator of purchases under the Master Agreement.
- With respect to any purchases made by Region 14 ESC or any Participating Agency pursuant to the Master Agreement, NCPA (a) shall not be construed as a dealer, re-marketer, representative, partner, or agent of any type of Contractor, Region 14 ESC, or such Participating Agency, (b) shall not be obligated, liable or responsible (i) for any orders made by Region 14 ESC, any Participating Agency or any employee of Region 14 ESC or Participating Agency under the Master Agreement, or (ii) for any payments required to be made with respect to such order, and (c) shall not be obligated, liable or responsible for any failure by the Participating Agency to (i) comply with procedures or requirements of applicable law, or (ii) obtain the due authorization and approval necessary to purchase under the Master Agreement. NCPA makes no representations or guaranties with respect to any minimum purchases required to be made by Region 14 ESC, any Participating Agency, or any employee of Region 14 ESC or Participating Agency under this Administration Agreement or the Master Agreement.
- With respect to any supplemental agreement entered into between a Participating Agency and Contractor pursuant to the Master Agreement, NCPA, its agents, members and employees shall not be made party to any claim for breach of such agreement.
- This Administration Agreement supersedes any and all other agreements, either oral or in writing, between the parties hereto with respect to the subject matter hereof, and no other agreement, statement, or promise relating to the subject matter of this Administrative Agreement which is not contained herein shall be valid or binding.
- Contractor agrees to allow NCPA to use their name and logo within website, marketing materials and advertisement. Any use of NCPA name and logo or any form of publicity regarding this Administration Agreement or the Master Agreement by Contractor must have prior approval from NCPA.
- If any action at law or in equity is brought to enforce or interpret the provisions of this Administration Agreement or to recover any administrative fee and accrued interest, the prevailing party shall be entitled to reasonable attorney's fees and costs in addition to any other relief to which such party may be entitled.
- Neither this Administration Agreement nor any rights or obligations hereunder shall be assignable by Contractor without prior written consent of NCPA, provided, however, that the Contractor may, without such written consent, assign this Administration Agreement and its rights and delegate its obligations hereunder in connection with the transfer or sale of all or substantially all of its assets or business related to this Administration Agreement, or in the event of its merger, consolidation, change in control or similar transaction. Any permitted assignee shall assume all assigned obligations of its assignor under this Administration Agreement.
- This Administration Agreement and NCPA's rights and obligations hereunder may be assigned at NCPA's sole discretion, to an existing or newly established legal entity that has the authority and capacity to perform NCPA's obligations hereunder.

### **Term of Agreement**

This Agreement shall be in effect so long as the Master Agreement remains in effect, provided, however, that the obligation to pay all amounts owed by Vendor to NCPA through the

termination of this Agreement and all indemnifications afforded by Vendor to NCPA shall survive the term of this Agreement.

**Fees and Reporting**

The awarded vendor shall electronically provide NCPA with a detailed quarterly report showing the dollar volume of all sales under the contract for the previous quarter. Reports are due on the fifteenth (15<sup>th</sup>) day after the close of the previous quarter. It is the responsibility of the awarded vendor to collect and compile all sales under the contract from participating members and submit one (1) report. The report shall include at least the following information as listed in the example below:

Entity Name	Zip Code	State	PO or Job #	Sale Amount

**Total** \_\_\_\_\_

Each quarter NCPA will invoice the vendor based on the total of sale amount(s) reported. From the invoice the vendor shall pay to NCPA an administrative fee based upon the tiered fee schedule below. Vendor’s annual sales shall be measured on a calendar year basis. Deadline for term of payment will be included in the invoice NCPA provides.

Annual Sales Through Contract	Administrative Fee
0 - \$30,000,000	2%
\$30,000,001 - \$50,000,000	1.5%
\$50,000,001+	1%

Supplier shall maintain an accounting of all purchases made by Public Agencies under the Master Agreement. NCPA and Region 14 ESC reserve the right to audit the accounting for a period of four (4) years from the date NCPA receives the accounting. In the event of such an audit, the requested materials shall be provided at the location designated by Region 14 ESC or NCPA. In the event such audit reveals an under reporting of Contract Sales and a resulting underpayment of administrative fees, Vendor shall promptly pay NCPA the amount of such underpayment, together with interest on such amount and shall be obligated to reimburse NCPA’s costs and expenses for such audit.

**ACKNOWLEDGMENT OF CONTRACTOR REQUIREMENTS**


National Cooperative Purchasing Alliance  
Organization

Matthew Mackel  
Name

Director, Business Development  
Title

PO Box 701273  
Address

Houston, TX 77270  
Address

  
Signature

December 8, 2022  
Date


Global Solutions Group, Inc.  
Vendor Name

Lisa Salvador  
Name

Vice President  
Title

25900 Greenfield Road, Suite 220  
Address

Oak Park, Michigan 48237  
Address

  
**Lisa Salvador**  
Signature

Digitally signed by Lisa Salvador  
DN: cn=Lisa Salvador, o=Global  
Solutions Group, ou=Vice President,  
email=lisas@globalsolgroup.com, c=US  
Date: 2022.12.09 10:52:38 -05'00'

December 9, 2022  
Date

## **Tab 3: Vendor Questionnaire**

**3. Tab 3: Vendor Questionnaire**

**TAB 3  
 VENDOR QUESTIONNAIRE**

Please provide responses to the following questions that address your company's operations, organization, structure, and processes for providing products and services.

**Locations Covered**

- Bidder must indicate any and all locations where products and services can be offered.
- Please indicate the price co-efficient for each location if it varies.

<input checked="" type="checkbox"/> <b>All 50 States &amp; District of Columbia</b> (Selecting this box is equal to checking all boxes below)			
<input type="checkbox"/> Alabama	<input type="checkbox"/> Illinois	<input type="checkbox"/> Montana	<input type="checkbox"/> Rhode Island
<input type="checkbox"/> Alaska	<input type="checkbox"/> Indiana	<input type="checkbox"/> Nebraska	<input type="checkbox"/> South Carolina
<input type="checkbox"/> Arizona	<input type="checkbox"/> Iowa	<input type="checkbox"/> Nevada	<input type="checkbox"/> South Dakota
<input type="checkbox"/> Arkansas	<input type="checkbox"/> Kansas	<input type="checkbox"/> New Hampshire	<input type="checkbox"/> Tennessee
<input type="checkbox"/> California	<input type="checkbox"/> Massachusetts	<input type="checkbox"/> New Jersey	<input type="checkbox"/> Texas
<input type="checkbox"/> Colorado	<input type="checkbox"/> Michigan	<input type="checkbox"/> New Mexico	<input type="checkbox"/> Utah
<input type="checkbox"/> Connecticut	<input type="checkbox"/> Minnesota	<input type="checkbox"/> New York	<input type="checkbox"/> Vermont
<input type="checkbox"/> Delaware	<input type="checkbox"/> Mississippi	<input type="checkbox"/> North Carolina	<input type="checkbox"/> Virginia
<input type="checkbox"/> D.C.	<input type="checkbox"/> Missouri	<input type="checkbox"/> North Dakota	<input type="checkbox"/> Washington
<input type="checkbox"/> Florida	<input type="checkbox"/> Kentucky	<input type="checkbox"/> Ohio	<input type="checkbox"/> West Virginia
<input type="checkbox"/> Georgia	<input type="checkbox"/> Louisiana	<input type="checkbox"/> Oklahoma	<input type="checkbox"/> Wisconsin
<input type="checkbox"/> Hawaii	<input type="checkbox"/> Maine	<input type="checkbox"/> Oregon	<input type="checkbox"/> Wyoming
<input type="checkbox"/> Idaho	<input type="checkbox"/> Maryland	<input type="checkbox"/> Pennsylvania	

<input checked="" type="checkbox"/> <b>All U.S. Territories and Outlying Areas</b> (Selecting this box is equal to checking all boxes below)	
<input type="checkbox"/> American Samoa	<input type="checkbox"/> Northern Marina Island
<input type="checkbox"/> Federated States of Micrones	<input type="checkbox"/> Puerto Rico
<input type="checkbox"/> Guam	<input type="checkbox"/> U.S. Virgin Islands
<input type="checkbox"/> Midway Islands	

<input checked="" type="checkbox"/> <b>All Canada Provinces and Territories</b> (Selecting this box is equal to checking all boxes below)	
<input type="checkbox"/> Alberta	<input type="checkbox"/> Prince Edward Island
<input type="checkbox"/> British Columbia	<input type="checkbox"/> Quebec
<input type="checkbox"/> Manitoba	<input type="checkbox"/> Saskatchewan
<input type="checkbox"/> New Brunswick	<input type="checkbox"/> Northwest Territories
<input type="checkbox"/> Newfoundland and Labrador	<input type="checkbox"/> Nunavut
<input type="checkbox"/> Nova Scotia	<input type="checkbox"/> Yukon
<input type="checkbox"/> Ontario	

If awarded a Master Agreement, will your company extend the terms offered in your Proposal to public agencies in Canada? If no or maybe, please explain.

Yes       Maybe       No

If awarded a Master Agreement, will your company extend the terms offered in your Proposal to private sector customers?

Yes       Maybe       No

**Minority and Women Business Enterprise (MWBE) and (HUB) Participation**

It is the policy of some entities participating in NCPA to involve minority and women business enterprises (MWBE) and historically underutilized businesses (HUB) in the purchase of goods and services. Respondents shall indicate below whether or not they are an MWBE or HUB certified.

Minority/Women Business Enterprise  
 Respondent Certifies that this firm  
 a Minority / Women Business Enterprise

Historically Underutilized Business  
 Respondent Certifies that this firm is a  
 Historically Underutilized Business

**Small Business, MWBE and HUB Growth**

If Proposer is a Large, National or Multinational Organization/Corporation, what programs are in place that partners or supports the growth of small and MWEB and HUB business? If yes, please describe.

N/A, we are a recognized small, MWEB or HUB organization

No, we do not have any programs in place.

Yes, we have programs in place.



**Residency**

Responding Company's principal place of business is in the city of Oak Park,  
State of Michigan.

**Felony Conviction Notice**

Please Check Applicable Box (If the 3<sup>rd</sup> box is checked, a detailed explanation of the names and convictions must be attached):

- A publicly held corporation; therefore, this reporting requirement is not applicable.
- Is not owned or operated by anyone who has been convicted of a felony.
- Is owned or operated by the following individual(s) who has/have been convicted of a felony

**Distribution Channel**

Which best describes your company's position in the distribution channel:

- Manufacturer Direct       Certified education/government reseller
- Authorized Distributor       Manufacturer marketing through reseller
- Value-added reseller       Other: Service provider

**Processing Contact Information**

Contact Person	<u>Lisa Salvador</u>
Title	<u>Vice President</u>
Company	<u>Global Solutions Group, Inc.</u>
Address	<u>25900 Greenfield Road, Suite 220</u>
City/State/Zip	<u>Oak Park, MI 48237</u>
Phone	<u>248-291-5440</u>
Email	<u>lisas@globalsolgroup.com</u>

**Pricing Information**

In addition to the current typical unit pricing furnished herein, the Vendor agrees to offer all future product introductions at prices that are proportionate to Contract Pricing. If answer is no, attach a statement detailing how pricing for NCPA participants would be calculated for future product introductions.

- Yes       No

Pricing submitted includes the required NCPA administrative fee. The NCPA fee is calculated based on the invoice price to the customer.

Yes       No

## **Tab 4: Firm Qualifications and Experience**

**4. Tab 4: Vendor Profile**

**• Company's official registered name**

**Company Name:** Global Solutions Group, Inc.

**• Brief history of your company, including the year it was established**

**Established Date:** May 01, 2003

GSG was founded in 2003 to provide IT Support Services to government agencies and private sector clients. Through our IT Support Services, we recognized a need for document management support, and started providing document digitization/conversion, storage, and destruction services as well as database management to our clients in 2008. We became a Microsoft Partner three years later.

We started implementing document management systems when we on-boarded several highly experienced Document Management Solution specialists, each with certifications from a leading solution provider – Laserfiche. We have since supported implementation at numerous municipal agencies, as well as providing maintenance support to agencies with existing Laserfiche systems. We have also implemented large installations for federal agencies, including two divisions in the Department of Commerce.

Throughout the past 19 years, we have added to our service portfolio while maintaining a commitment to providing excellence in service and value to our clients. Through 18 years of lessons learned, we have developed a lean, flexible corporate culture that is capable of adapting to the needs of our clientele while building a solid foundation both in operational and financial stability upon which we can continue our growth. GSG maintains a strong commitment to continuous improvement in all aspects of our business.

**List of Clients:** GSG has been providing document management services to local, state, and federal government agencies:

- Great Lakes Water Authority, Michigan
- Fort Worth Housing Solutions, Texas
- Port Arthur Housing Authority, Texas
- Housing Authority of the City of Reno, Nevada
- Grand Rapids Community College, Michigan
- Washtenaw County, Michigan
- City of Farmington Hills, Michigan
- City of Livonia, Michigan
- City of Inkster, Michigan
- Detroit People Mover
- City of Southfield, Michigan
- Detroit Transportation Corporation, Michigan
- Universal Load Bank, Wixom, Michigan
- City of Dexter, Michigan
- City of Detroit
- Howard University, Washington, DC
- South Dakota Bureau of Administration
- City of Gainesville, Florida
- City of Pembroke Pines, Florida
- Air Force Civil Engineer Center Tyndall – Tyndall Air Force Base, Florida
- State of Iowa – Department of Administrative Services
- State of North Carolina – Department of Agriculture and Consumer Services
- State of North Carolina – Army National Guard
- U.S. Department of Defense – National Defense University
- U.S. Department of Commerce – Office of the General Counsel
- U.S. General Services Administration – Office of the Administrator
- U.S. Department of Health and Human Services - Centers for Medicare & Medicaid Services
- Department of the Air Force - Secretary of the Air Force, FMBIB and SAF/FMFD
- U.S. Department of the Army – Redstone Arsenal
- U.S. Army Engineer District – U.S. Army Corps of Engineers
- U.S. Army Contracting Command, MICC

- New Hampshire Department of Education, New Hampshire
- Tennessee Higher Education Commission, Tennessee
- City of Athens, Tennessee
- City of Rancho Cucamonga, California
- San Bernardino County Transportation Authority, California
- Bernards Township, New Jersey
- Department of Veterans Affairs- Veterans Health Administration - Program Contracting Activity Central (PCAC)
- U.S. Coast Guard–Philadelphia, PA
- U.S. Department of Interior – Fish & Wildlife Service
- U.S. Department of the Interior – National Park Service
- U.S. Department of Interior - Bureau of Land Management (BLM) - Nevada Bureau of Land Management
- U.S. Department of Commerce – Office of the General Counsel
- U.S. Department of Commerce – National Oceanic and Atmospheric Administration
- U.S. Department of State – Office of Medical Services

**• Company’s Dun & Bradstreet (D&B) number.**

078343325

**• Company’s organizational chart of those individuals that would be involved in the contract.**

Our organizational structure — based on arranging clear-cut lines of communication, responsibility, and relationships in a straightforward manner — facilitates formal and informal communications between our Contract Manager, Customer Success Manager, and your stakeholders. Regular customer communication (both scheduled and spontaneous) is a critical element in our management approach. We believe that establishing an atmosphere of cooperation, coupled with a clear communication structure, is crucial to resolve or prevent potential unanticipated challenges. At GSG, we strive for transparency in all our client interactions.

GSG’s technology solutions are designed to provide the greatest benefit at the lowest cost, with the least possible amount of disruption to our clients’ day-to-day activities. We work with our clients to clarify project and program requirements, develop schedules, and ensure performance via predetermined goals and objectives (schedule milestones).

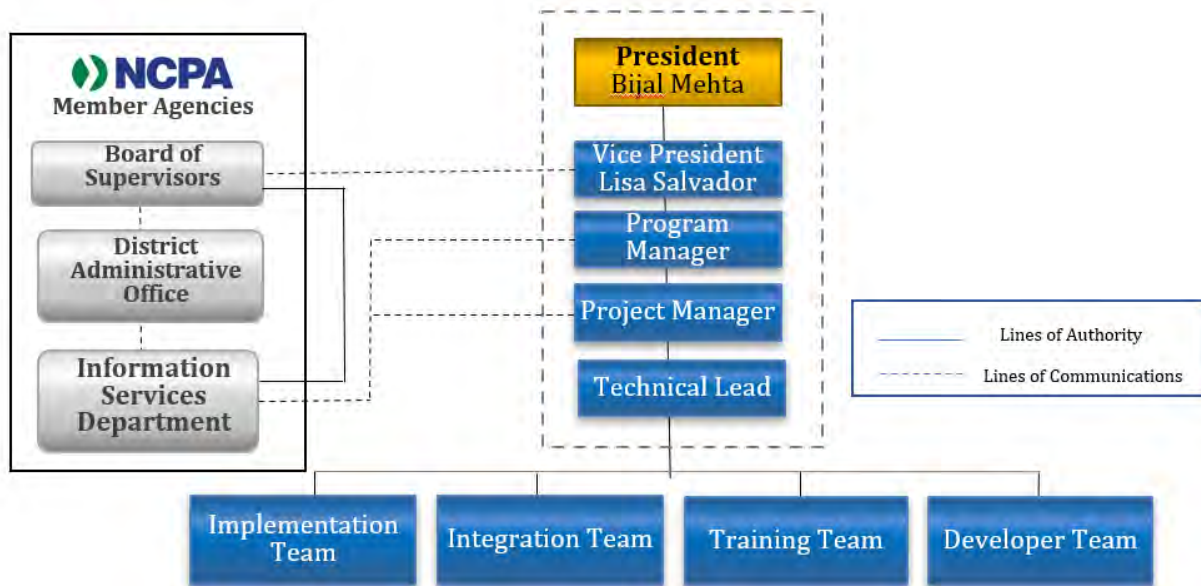
We have a diversely qualified team in place to ensure that exceptional financial, administrative, contractual, and general project performance is provided throughout the duration of the contract. Our personnel will be available to support the Contract Manager and Customer Success Manager as necessary, ensuring correct workflow and mission clarity on each project.

The following is a proposed overall organizational chart that details the primary personnel slated to serve as the main points of contact for NCPA.



From our corporate headquarters in Oak Park, Michigan, we can respond quickly and efficiently to customer requirements. Our internal office-networking infrastructure provides the ability to maximize control/communication and facilitate project planning and resource management. Our Project Manager will be responsible for delivering these services from our Michigan headquarters, and the other key personnel will operate from our headquarters as well. GSG has a solid core in place to lead this project. Our key personnel provide exceptional experience and leadership to our scanning team. When new personnel are hired, the below personnel will provide required training in the relevant aspects of document scanning. We will not involve any subcontractor for this project. GSG will provide all the services.

The following organization chart identifies the functional relationships between our team members:



**• Corporate office location.**

Office Location 25900 Greenfield Road, Suite 220  
Oak Park, MI 48237  
[www.GlobalSolGroup.com](http://www.GlobalSolGroup.com)

**• List the number of sales and services offices for states being bid in solicitation.**

GSG’s headquarters office is located in Michigan. All services and sales for all locations will be managed through this location.

Address: 25900 Greenfield Road, Suite 220  
Oak Park, MI 48237

**• List the names of key contacts at each with title, address, phone and e-mail address.**

Name: Lisa Salvador  
Title: Vice President  
Address 25900 Greenfield Road, Suite 220  
Oak Park, MI 48237  
Direct: (248) 291-5440  
Mobile: (313) 333-0188  
Email: [lisas@globalsolgroup.com](mailto:lisas@globalsolgroup.com)

• **Define your standard terms of payment.**

Net 30 days from date of invoice. Prompt payment discount of 1 % if paid within 7 days of receipt of invoice.

• **Who is your competition in the marketplace?**

GSG has extensive experience in providing Laserfiche Enterprise Content Management, Document Management Systems, and related services to Educational Organizations, Health Care Organizations, Legal Offices, Housing Authorities, and State, Local, and Federal clients. We are Value Added Reseller of Laserfiche products. Laserfiche provides easy-to-use and integrated capabilities. Laserfiche has a box solution that is customizable to nearly any use case in a wide variety of industries. Laserfiche possesses DOD 5015.2 Certification for Records Management and Compliance. With over 19 years of experience providing a full spectrum of IT support for our clients, we have built the capacity and pool of talent needed to expertly and effectively provide any level of ECM and DCM support services required. We have a certified, talented, and highly skilled team to customize our proposed solution according to the customer's requirements.

GSG offers 18 years of lessons learned from providing directly relevant work performing on large-scale federal government contracts, as well as on projects for a variety of commercial and non-commercial clients. Through our team's experience in IT services, including our involvement in government, public services, account administration, and data management, we ensure the reduction of risk and the provision of timely, cost-effective services to the satisfaction of all stakeholders.

We have many competitors in the market, including:

- Dynamic Document Services
- Information Consultant, Inc. (icons.com)
- Entance: Software Consulting
- Acyutah Technologies
- Boxygen Managed IT Support and VOIP Services
- CDI
- Accelerated
- MCCI

Products that compete with our Laserfiche solution include:

- OnBase
- Alfresco
- IBM FileNet
- DocuShare
- M-Files
- Newgen
- SharePoint

**• What differentiates your company from competitors?**

GSG’s solution experts have extensive experience of planning and executing mid to large size Electronic Content Management implementation projects. Our tried and tested project methodology provides a highly efficient implementation and integration structure, which reduces the time and cost for getting client systems running. We define the project procedures up front, stick to the project plans and monitor on a daily basis to ensure each project is completed successfully.

**Why GSG for Laserfiche Documents and Records Management Services:**

	<b>GSG Advantages</b>	<b>Benefits to Client</b>
<b>Authorized VAR</b>	<ul style="list-style-type: none"> <li>GSG is a Laserfiche Authorized Value-Added Reseller. We have a highly experienced execution team which includes project managers, quality control specialists, supervisors, and technicians.</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge that services are provided by professionals recognized by Laserfiche.</li> </ul>
<b>Skill &amp; Technical knowledgeable Team</b>	<ul style="list-style-type: none"> <li>Our key personnel are Laserfiche Certified to provide all Laserfiche support, including Upgrades, Installation, and Maintenance.</li> <li>Prompt response to our clients Laserfiche technical support issues and how-to inquiries with fast case resolution.</li> </ul>	<ul style="list-style-type: none"> <li>Professionals trained and dedicated to providing outstanding performance for the required services.</li> </ul>
<b>Applicable Experience and Past Performance</b>	<ul style="list-style-type: none"> <li>GSG has experience providing large-scale Laserfiche Implementation, Maintenance and Support services with Laserfiche certified personnel</li> <li>We provide support to municipal, state, and federal government agencies.</li> </ul>	<ul style="list-style-type: none"> <li>Quick response and transparent implementation and service solutions.</li> <li>Direct experience with Clients’ Laserfiche implementation.</li> </ul>
<b>Project Management</b>	<ul style="list-style-type: none"> <li>Our Laserfiche Gold Certified Project Managers are Certified Project</li> </ul>	<ul style="list-style-type: none"> <li>Extensive Laserfiche service management experience to</li> </ul>



GSG Advantages		Benefits to Client
	Management Professionals, and will direct the team(s), including developing project schedules, tracking tools, transition activities, implementation, and allocation of resources.	handle every detail and coordinate all activities so clients can rest assured of completion on time and within budget, and with minimal impact on their mission objectives while ensuring that goals are met.
<b>On Site and Off-Site Training</b>	<ul style="list-style-type: none"> <li>GSG provides both on-site and remote/Web-based training.</li> </ul>	<ul style="list-style-type: none"> <li>Personnel will gain an understanding of the software's capabilities and utility.</li> </ul>
<b>Quality Management</b>	<ul style="list-style-type: none"> <li>Our Management Approach is based on building long-term relationships with our clients. Client satisfaction is the key metric for project success.</li> </ul>	<ul style="list-style-type: none"> <li>Guaranteed quality performance.</li> </ul>

**• Describe how your company will market this contract if awarded.**

GSG will create special marketing efforts and distribution materials designed to enhance awareness of our ECM/DMS Products, and Services and our participation in the NCPA Cooperative Purchasing program.

Our team will gain marketing insights and leads through participation at government conferences and trade shows attended by government agencies, educational organizations, and purchasing officers. We will provide participants with our information, including linking to our NCPA landing page.

We also have an active social media program, and we target public and private sector organizations through social media-based campaigns. Our team monitors multiple public bid platforms for current and upcoming opportunities from clients, and we leverage our experience and reputation to create winning proposal responses for all levels of government.

GSG reviews a 10-point sales and marketing strategy for each contract to boost profits and gain ground with competitors. We start by breaking down the process into discrete, manageable elements and generate a checklist that can be reviewed to prioritize areas needing improvement and serve as the groundwork for an effective marketing strategy.

**1) Markets:** GSG researches various portals for current and future markets to learn why customers buy from us and what we can add to our offerings to attract more customers. GSG identifies easily missed opportunities in bulk, institutional, industrial, or corporate markets. This data can help us to determine if new features or services will attract new customers or if people will pay more for them.

**2) Competition:** Every organization can benefit by knowing who its competitors are and what they are up to. What is the overall market trend, and how are you holding up in terms of market share and profit position? How do you rank against competitors? What substitutes are there for your products? We use competitive intelligence to maintain and enhance your business's market share. This involves researching what competitors offer, their price points, and what their marketing strategies say about the demographics they are targeting.

**3) Distribution:** We identify ways to get products or services to new outlets profitably. This could involve increasing web sales, expanding delivery options, contracting with additional retail outlets to carry products, finding mutually beneficial ways to collaborate with other businesses, and more.

**4) Positioning:** It is important to know where we fit in the market and knowing your competition is a big part of this.

**5) Promotion:** We maximize our chances of reaching potential customers by meeting them where they are. When trying to reach an audience through social media, for example, it's good to know which demographic uses which platforms.

**6) Pricing:** We constantly review our pricing strategy to be sure it makes sense for everything we offer. Consumer demand, product availability, and other external factors all play a role in our pricing structure.

**7) Customer Service:** The first step to providing good customer service is understanding the kind of service our customers want. We encourage customer feedback through our open lines of communication, and we are always receptive to client requirements and comments. This contract will have a dedicated Customer Success Manager to ensure that NCPA members are satisfied with our services.

**8) Financing:** GSG reviews our capital structure regularly to make sure we are handling assets and liabilities in the most cost-effective way.

**9) Consistent Strategies:** Customer loyalty and increasing sales to existing customers is a major goal for GSG. Our focus is on giving our customers superior service that consistently exceeds expectations. Our strategy for doing so focuses on having clear and consistent lines of communication to ensure everything is proceeding according to schedule and budget. Our team always looks for ways to increase value to the customer without increasing the cost.

## **Sales Strategy**

GSG's 10 keys to developing a successful sales strategy:

1. Build a powerful value proposition in your messaging
2. Create the urgency to change
3. Tell a compelling and memorable story
4. Speak to the deciding journey, not your sales process
5. Do not rely on buyer personas in your sales strategy
6. Avoid the "commodity trap" in your sales strategy
7. Lead with insights, not discovery questions
8. Align sales and marketing
9. Tailor your sales strategy for customer expansion
10. Enable ongoing situational training

## **Order Processing**

GSG's order processing involves the following steps:

Order processing requires coordination between different areas — sales, customer care, suppliers, bookkeeping, and managers — to ensure that all orders are processed accurately, in a timely manner, and in compliance with order processing guidelines.

- Ensure all relevant order processing paperwork is submitted in accordance with order guidelines
- Ensure appropriate approvals are in place before processing an order
- Double check all order requirements and fulfillment objectives

- Work closely with the marketing and proposal teams to provide insight on orders and help prioritize schedules
- Work with relevant personnel on non-compliant orders and provide direction and clarity on steps to resolve order issues
- Develop a strong understanding of historical and new orders as well as customer and partner base
- Ensure orders comply with our licensing mechanism(s) and approval processes
- Document order management processes and update documents as processes evolve
- Monitor sales order database as needed

### **Customer Support**

Laserfiche provides multi-level support and maintains procedural escalation paths to ensure our customers receive the assistance they require. 24-hour online support opportunities, email & telephone technical support, and on-site and remote dial-up services incorporate resources from engineering, quality assurance, and development staff. GSG has a team of technical engineers who will be focused on the design, implementation, and rollout of this project. Within the scope of the implementation, technical support is built into the deployment process for any person needing assistance. Because we know that support is important, we will place a dedicated technical engineer to answer questions as needed, who will also manage the knowledge transfer and product training development and documentation.

**Telephone Support** – GSG provides a telephone number to contact. We provide live technical support that will be available during regular business hours Eastern Time Monday through Friday, excluding observed holidays.

**E-Mail Support** – We provide one or more electronic mail addresses to which routine or non-critical support requests can be made 24 hours a day, which we will address during regular business hours, 8:00 AM until 6:00 PM.

**Online Support** – We provide access to archived software updates and other technical information in online support databases, which are available, continuously, 24 hours a day.

**Software Updates** – We provide revisions of, and enhancements to, software products as and when they are released. We deliver, or make available to customers for download, software updates and supporting documentation via our File Transfer Protocol (FTP) site.

**Emergency Services** – We provide full support for emergency services.

**Remote Support** – When it is required for the proper resolution of a maintenance request, GSG provides remote assistance via the WebEx environment or another mutually acceptable remote communications method.

### **• Describe how you intend to introduce NCPA to your company.**

GSG will provide marketing materials, logos, and catalogs as required for posting in the vendor section of the NCPA website under the appropriate categories. We will also monitor the solicitations posted on the website.

Our Document and Records Management team will be provided with details regarding the NCPA contract including the online ordering process and our NCPA landing page. They will also identify any NCPA member organizations and reach out to their purchasing teams to inform them of GSG's participation in the NCPA Cooperative Purchasing program.

• Describe your firm’s capabilities and functionality of your on-line catalog / ordering website.

For all document management requirements, a detailed quote is required to specify the number of users – both full named users and read-only users, the desired add-on modules, if any, required integrations, any customizations, and other parameters that will define the system.

Global Solutions Group Inc.’s online catalog/ordering system allows customers to request a quote, view our catalog, and communicate with us:

[https://www.globalsolgroup.com/catalog\\_contact.php](https://www.globalsolgroup.com/catalog_contact.php)

- 1) On our website, customers have the option to select our data services and products. This includes ECM and Scanning services. Under each service, we list related products.
- 2) Customers seeking a quote for Document or Records Management will need to register.
- 3) Once registered they will receive an email for verification with their login details.
- 4) Once a user logs in using the credentials, they are redirected to screen where they can download informative documents and create customized quotes for various product configurations.
- 5) The customers can create customized quotes for various license types, count, configuration, and support options.
- 6) The customer can save the quote as draft and get back to it at a later stage for finalization
- 7) Any ongoing promotions will be offered to the customers via catalog system
- 8) Upon the quote creation submission, our sales team will contact them to continue processing of order placement and license activation(s).

Below are the screenshots of the On-line Catalog System:

**Online Catalog Landing Page**



## User Registration Page

User Registration

<p><b>Customer Information</b></p> <p>Organization name *</p> <input type="text"/> <p>Address *</p> <input type="text"/> <p>Address 2</p> <input type="text"/> <p>Country *</p> <p>— Select One —</p> <p>State/Province</p> <p>— Select One —</p> <p>City *</p> <input type="text"/> <p>Zipcode</p> <input type="text"/> <p>Main phone</p> <input type="text"/> <p>Industry *</p> <p>— Select One —</p>	<p><b>Contact Information</b></p> <p>First name *</p> <input type="text"/> <p>Last name *</p> <input type="text"/> <p>Title/Position *</p> <input type="text"/> <p>Phone *</p> <input type="text"/> <p>E-mail *</p> <input type="text"/> <p>Password *</p> <input type="password"/> <p>Heard about Laserfiche from</p> <p>— Select One —</p> <p>Reason for buying</p> <p>— Select One —</p> <p>Captcha</p> <input type="text"/> <p style="text-align: center;"><b>W6 8HP</b></p> <p style="text-align: center;"> <input type="button" value="REGISTER"/> <input type="button" value="CANCEL"/> </p>
---	---

## User Verification Page

User Verification

Thank you for registration. Secret code has been sent to your registered email id. Please enter code to complete verification.

Email	<input type="text"/>
Secret Code	<input type="text"/>
Captcha	<input type="text"/>

D7RQN5


## Login Page

### Login

Email

Password

Captcha



[Not Registered? Sign Up](#)

## Quote List

### Your Quote List

Quote Name	Edit	Delete
Avante Quote for SQL Express	<a href="#">Edit</a>	<a href="#">Delete</a>
Avante Quote with Oracle DB	<a href="#">Edit</a>	<a href="#">Delete</a>
My Avante Quote with Advanced Audit Trail	<a href="#">Edit</a>	<a href="#">Delete</a>
Avante Quote with SDK	<a href="#">Edit</a>	<a href="#">Delete</a>
Avante Quote for SQL Express_50 users	<a href="#">Edit</a>	<a href="#">Delete</a>
Avante Quote for SQL Express_75 users	<a href="#">Edit</a>	<a href="#">Delete</a>
Avante Quote with Oracle DB - revised	<a href="#">Edit</a>	<a href="#">Delete</a>

## Quote Template

### Laserfiche Avante Quote

	Quantity	Unit Price	Unit Total	LSAP Total	Line Total
<b>Server</b>					
Avante Server for SQL Express	1	\$3,000.00	\$900.00	\$150.00	\$1,050.00
Additional Repository for SQL Express	0				
Avante Server for MS SQL	0				
Avante Records Management Edition Server	0				
Additional Repository for MS SQL	0				
Avante Server for Oracle	0				
Additional Repository for Oracle	0				
Avante Records Management Server for Oracle	0				
Avante Named Full User with Web Client	0				
<b>Web Tools (Includes Laserfiche Mobile)</b>					
Avante Forms Professional	0				
Avante Forms Portal	0				
Avante Forms Authenticated Participants	0				
<b>Audit Trail</b>					
Starter Audit Trail	0				
Standard Audit Trail	0				
Advanced Audit Trail	0				
<b>Additional Server Add-Ons</b>					
Avante Records Management Module	0				
Digital Signature	0				
<b>Scan Connect</b>					
Scan Connect 10-pack	0				
Scan Connect 5-pack	0				
Scan Connect	0				
<b>Quick Fields</b>					
Quick Fields	0				
<b>Web Publishing</b>					
Starter Public Portal	0				
Standard Public Portal	0				
Mid-sized Public Portal	0				
Unlimited Public Portal	0				
Web Distribution Portal	0				

- Describe your company's Customer Service Department (hours of operation, number of service centers, etc.)**

Our team supports clients to implement and support the Solution for all the activities including development of project management planning documentation; requirements collection and validation, Solution design, data migration, configuration, integration, and testing; deployment and training; operations, support, and maintenance services. using these supports, Our clients will be able to improve business process and full fill all the required services on time. GSG maintains a strong commitment to quality. GSG uses this feedback to improve on the quality of services we provide.

GSG provides a variety of technical support options that include onsite, telephone, conference call, and online. Our personnel can also provide the support by making visits onsite. We have a dedicated technical support hotline, where users can dial in and contact our ECM personnel. Our hours of availability are M-F, 9am-5pm. We can arrange for conference calls with online support to share

screens to discuss and resolve the issue. Our response time is within 24 hours since the issue has been brought and depending upon the complexity of the issue, we will provide the resolution times. For example, level 1 issues can be resolved within 24 hours. Level 2 may take 48 hours to resolve and so on.

Global Solution Group's Support	
Days of the week and hours support is available (PST.)	7:00 a.m. – 5:00 p.m. Monday through Friday PST
Average response times (initial call.)	Normally our team solves the problems with in one day.
Maximum “call-back” times (during normal business hours.)	Within one hour. Our resources are available 24/7.
Average “open ticket” or problem resolution time.	Within 12 hours, depending on the nature of the problem.

Our support resources are available 24/7, we are always ready to quickly identify the root cause of your issue, find a resolution, and provide follow-up communication to ensure your satisfaction.

Laserfiche Support Number and Email address:

**Phone:** 313-397-8311

**Email:** [LFsupport@globalsolgroup.com](mailto:LFsupport@globalsolgroup.com)

Normally our team resolves problems with in one to two days. For critical issues our team will review the issue and what will be required for resolution and develop a time frame to minimize the impact on the client. If the resolution can be implemented remotely, we would, ideally, decide to do so after business hours. GSG uses the following guidelines to prioritize customer requests and strives to begin working on the reported issue or problem within the target timeframe. As per criticality, our team will resolve the problem according to work priority as illustrated in the table below. Actual response times may be shorter or longer depending on the volume of requests at any one time.

<i>Severity</i>	<i>Acknowledge Time</i>	<i>Response Time</i>	<i>Resources Assigned Within</i>	<i>Updates</i>	<i>Target Resolution</i>
<b>Tier 4</b>	10 to 15 minutes	45 Minutes	1 Hours	Every 2 Hours	24 hours
<b>Tier 3</b>	10 to 20 minutes	90 Minutes	2 Hours	Every 4 Hours	48 Hours
<b>Tier 2</b>	30 minutes	2 Hours	3 Hours	Every 4 Hours	3 Business Days
<b>Tier 1</b>	1 Hour	3 Hours	4 Hours	N/A	Next Software Update
<i>Severity</i>	<i>Definition</i>				
<b>Tier 4</b>	Error renders the program completely unable or nearly unusable or introduces a high degree of operational risk. No workaround is available. Until this error is				



<i>Severity</i>	<i>Definition</i>
	resolved, the programs use is essentially halted. Many users and/or care program functionality is severely impacted.
<b>Tier 3</b>	Error renders essential functionality of the program to be consistently unavailable or obstructed and causes a moderate level of hindrance or risk. Workarounds may be available but use if the program is acutely degraded and causes continuing operational risk. A moderate number of users are significantly impacted, but overall, the program continues to function.
<b>Tier 2</b>	Error is an inconvenience or causes inconsistent behavior, which does not impede the normal functioning of the program. It could be an error that occurs in consistently and affects non-essential functions or is an inconvenience which impacts a small number of users. It may also contain visual errors where the graphical display of the program is not ideal, but still functioning correctly.
<b>Tier 1</b>	Error has a small degree of significance, or is a minor cosmetic issue, or is a “one off” case. A “one off” case occurs when the error occurs infrequently and cannot be reproduced easily. There are errors that do not impact the daily use of the program. A low error is something that does not affect normal use, and can be accepted for a period of time, but user would eventually want that to be changed.

- **Green Initiatives (if applicable)**
  - As our business grows, we want to make sure we minimize our impact on the Earth’s climate. We are taking every step we can to implement innovative and responsible environmental practices throughout NCPA to reduce our carbon footprint, reduce waste, energy conservation, and ensure efficient computing and much more. To that effort we ask respondents to provide their companies environmental policy and/or green initiative.

At GSG, we are constantly aiming to minimize our impact on the environment. We stress reduction of waste generated by employees and encourage recycling, energy conservation, and water conservation efforts, such as providing employees with filtered water stations as opposed to use of bottled water.

Every printer has a paper recycling box next to it rather than a waste basket. We purchase supplies that contain a high percentage of post-consumer recycled content. When the building is not occupied, we do not run the lighting.

To further reduce the use of fuel and energy required for document delivery, GSG also encourages the use of Scan-on-Demand. When a client needs a document, it can be scanned and delivered electronically, eliminating the need for a physical delivery, further reducing the use of fuel and release of emissions into the environment. Many of our technology offerings are designed specifically to reduce the amount of waste material and energy use that accompanies maintenance and storage of physical documents.

- **Anti-Discrimination Policy (if applicable)**
  - Describe your organizations’ anti-discrimination policy.

Not Applicable

- **Vendor Certifications (if applicable)**

- Provide a copy of all current licenses, registrations and certifications issued by federal, state, and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing respondent to perform the covered services including, but not limited to, licenses, registrations, or certifications. Certifications can include M/WBE, HUB, and manufacturer certifications for sales and service.

**VAR Certificate**

GSG is a Gold Certified Reseller of Laserfiche. Laserfiche is a software vendor and will provide software licenses to GSG. Please find the below Authorized Reseller Agreement from Laserfiche for your ready reference:

DocuSign Envelope ID: 629E37FF-0480-48C0-AD94-FBD4AD84A5CD

**Laserfiche**

March 17, 2020

To Whom It May Concern:

This letter certifies that Global Solutions Group, Inc. is a Laserfiche certified Solution Provider authorized to distribute Laserfiche software products. As a Laserfiche Solution Provider, Global Solutions Group, Inc. has the authority to sell, market, install, and maintain services of Laserfiche software products and services. If you have any questions or comments, please feel free to call or email your Regional Manager, Alex Matos, at 562-988-1688 x 109 or alex.matos@laserfiche.com.

Regards,

DocuSigned by:  
  
1A1F1CCE2A86804  
Hedy Belttary  
Senior Vice President of Sales

3545 Long Beach Blvd.  
Long Beach, CA 90807

Tel: 562-988-1688  
[laserfiche.com](http://laserfiche.com)

## Department of Defense 5015.2

Laserfiche is certified in the Department of Defense 5015.2 version 3 design criteria standard for electronic records management, the accepted standard for many state, county, and local governments



# DoD 5015.02-STD April 2007 Baseline Requirements COMPLIANCE

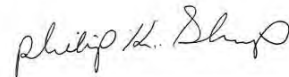


**Product:** Laserfiche Records Management  
Edition 9

**Vendor:** Laserfiche

**Test Configuration ID:** TCFY13-12

**Expiration Date:** Perpetual



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PHILIP K. SHARP  
Chief, Focused Logistics/Business  
Portfolio

### Small and Minority and Women's Business Enterprise

THIS CERTIFIES THAT

**Global Solutions Group, Inc.**



\* Nationally certified by the: **MICHIGAN MINORITY SUPPLIER DEVELOPMENT COUNCIL**

\*NAICS Code(s): 541511; 541512; 541611; 561110; 561320; 561410; 541519; 561621

\* Description of their product/services as defined by the North American Industry Classification System (NAICS):

<p>09/22/2022</p> <hr/> <p><b>Issued Date</b></p>	<p>MI03275</p> <hr/> <p><b>Certificate Number</b></p>
<p>10/01/2023</p> <hr/> <p><b>Expiration Date</b></p>	<p> <b>Ying McGuire</b> NMSDC CEO and President</p> <p> <b>Michelle Sourie Robinson, President &amp; CEO</b></p>

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: <http://nmsdc.org>

Cerify, Develop, Connect, Advocate.

\* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®

# **Tab 5: Products and Services / Scope**

## 5. Tab 5: Products and Services / Scope

Our Technology Division has specialties in Document Digitization, Laserfiche Information Management, Digital Transformation, Professional Services, Healthcare Technology, Cybersecurity and Custom Software Solutions. As a part of the Technology Services organization, our Information Management practice provides Enterprise Content Management solutions from Laserfiche along with services from certified professional consultants responsible for delivering the required service to successfully implement the solution.

Our most popular for Documents and Records Management system, Laserfiche, is trusted by more than 35,000 organizations worldwide to manage, secure, and share information. Laserfiche has extensive products to develop ready-made solutions for capture, workflow, forms, e-signatures, and case management that has the capability of helping your organization drive business value—and make timely, informed decisions. Along with winning industry awards, Laserfiche has also set the industry standard with a Department of Defense 5015.2-Certified Records Management solution.

For every client, we provide both technical and end user training based on client-specific requirements. We provide both end-user and administrative training that can be tailored to provide expertise commensurate with the level of control the client needs from their ECM system. Combined with our expertise in web development, programming, web hosting (Azure and AWS) and cyber security, we have the capability to develop custom solutions to work in conjunction with our ECM products to deliver functionality not available through standard software options. We are a Gold Certified Value-Added Reseller of Laserfiche, and we implement Laserfiche Enterprise Content and Document Management software.

Laserfiche product line contains software solutions for all the categories.

- Enterprise Content Management
- Workflow
- Records Management
- Records Storage
- Document Imaging
- Document Management
- Data Backup & Recovery
- Secure Shredding
- Web-Form Software
- Mobile Device Management

Our Project Managers provide implementation and training services to help make your solution an Enterprise-wide deployment. Our Team has experience for Documents and Records Management Services at city, state, and federal government level projects. GSG's organizational and corporate structure promotes strong lines of communication, definitive reporting structure, clear assignment of roles and responsibilities and delivery of quality products and services. Our Team's organizational structure offers the following value propositions:

- Direct line of control & communications
- Access to all team resources
- Independent Quality Assurance Manager
- Full time PM with full authority
- Integrated Team
- Budget/Timekeeping
- Quality Control Oversight

## **Warranty**

As part of our System Maintenance and Warranty, GSG will include replacements of any equipment that malfunctions, provisional future upgrades, and an industry standard service call/emergency system repair response time. Through this warranty, you will be able to promptly troubleshoot and resolve any maintenance issues that arise before they impact operations or staff productivity. You will also be provided with online support resources, where you will receive an account for ECMS system Answers, the online social community for GSG's ECMS system users and developers. Here you will gain access to the large library of technical white papers, help files, and education materials on the product Support Site. In addition, we will also provide a mitigation towards undue system downtime with normal repairs and preventative maintenance. All the licenses and warranties will be identified under the NCPA's name and purchased using the NCPA's Corporate or Volume licensing agreements. Our team operated for software Maintenance and support services, software design and build, Training in other projects. Using this expertise, we will provide all the services on time. Our team covers professional support, Laserfiche software upgrades, daily backups taken, access to Laserfiche public knowledge base, access training etc. in enhanced services.

## **Products**

As Laserfiche and associated services are software, we will not provide any used products or equipment.

## **Construction**

GSG will perform services in a good and workmanlike manner and in accordance with industry standards.

## **Project Management**

GSG' Project Managers are highly trained in implementation, workflow processes, integration, and more to help your organization implement a well thought out enterprise-wide system based on needs. They are Laserfiche Gold Certified and hold other professional certifications to maintain a high knowledge level of client's business processes.

## **Configuration and Deployment**

The highly trained and experienced engineering and consulting staff of GSG is available to develop and deliver a Laserfiche solution configured to meet the NCPA needs. To deploy our services, we use an agile project management methodology which provides a predictable, reliable deployment strategy to ensure a timely and successful implementation of our system. Prior to deployment, our engineers will sit to understand the NCPA requirements in the detail, including the business processes and how they are currently structured, how the NCPA staff interacts with the documentation on a given day as well as understand the overall goals of the departments. Our engineers pride themselves on being able to take a process and re-engineer it, so that tasks can be automated and streamlined for efficiency.

## **Planning and Management**

With the experience our engineers have gained over the years, they will put a project plan in place to outline a timeline for project completion. Using the agile methodology, they will be able to constantly adjust how phases are accomplished and will work to meet the needs of the departments. During the requirements gathering, our engineers will be able to estimate the number of days needed for such things as software installation, configuration, training and any design or migration that may take place.



## System Security

Among our core capabilities, GSG has a strong Cyber security support team. This expertise informs every other aspect of our work. We know how to ensure the most secure configurations for your systems to ensure that your data maintains the five pillars of information assurance: ***Integrity, Availability, Authentication, Confidentiality, and Nonrepudiation.***

## Dedicated Support and Training

GSG provides dedicated support staff for trouble shooting and supporting Laserfiche system. Our staff can be easily reached through email, phone or our online support facility. GSG has a team of technical engineers who will be focused on the design, implementation and roll out of this project. Within the scope of the implementation, technical support is built into the deployment process for any personnel needing assistance. Because we know that support is important, we will place a dedicated technical engineer to answer questions as needed, who will also manage the knowledge transfer and product training development and documentation

## 5.1 Categories

- **Enterprise Content Management**

Laserfiche distributes its software through a worldwide network of Value-Added Resellers (VARs), who tailor solutions to clients' individual needs. The Laserfiche VAR Program has received the Five-Star Rating from VAR Business magazine. **GSG is a certified VAR for Laserfiche, and our staff includes certified Laserfiche Implementation Consultants.** Our professionals are Laserfiche Gold Certified Professionals. Our professionals are working with customers to meet their unique product needs.

Laserfiche the 2021 Product of the Year Award Winner by Cloud Computing Magazine, has been a leader in Electronic Content Management (ECM) solutions, since 1987 and has been implemented in over 34,000 organizations worldwide, including federal, state and local government agencies, higher education institutions, and Fortune 1000 companies.

Since 1987, Laserfiche has used its Run Smarter philosophy to create simple and elegant enterprise content management solutions. Laserfiche offers 2 configurations/pricing models of their product to address the business needs of small to large organizations. These are



**Laserfiche Avante** – for small to medium sized business to help eliminate paper and quickly realize administrative efficiencies. It Offers flexible pricing with a named-user licensing model including core features, with ala carte options to cost-effectively add additional users and product capabilities, as you grow the system and expand its uses.



**Laserfiche Rio** – includes additional functionality for managing documents on an enterprise-wide basis, across multiple departments, with greater control. It allows organizations to set up standards for document use in a central enterprise information management system. It grants the IT department a central control over standards, security and auditing, while giving individual departments flexibility to customize their filing structures, views and workflows. Rio includes all major capabilities with only a few additional features available as options.



### Laserfiche supports the following functionalities:

With capabilities ranging from electronic records management to document routing, electronic forms and digital signatures, Laserfiche Enterprise Content Management is a powerful solution that enables the entire enterprise as under. Speeds acceptance and user adoption with an easy-to-use

interface and intuitive system design. Supports multiple repositories including development, testing, staging and production. Reduces deployment time and minimizes IT support with online training programs and extensive support resources.

Laserfiche Enterprise Content Management software empowers organizations to operate more efficiently, effectively and profitably by:

- **Decreasing overhead costs** of paper storage, office space and additional hiring.
- **Streamlining operations** by automating repetitive, manual processes.
- **Managing all organizational content** throughout its life cycle.
- **Facilitating compliance** with robust security and auditing features.
- **Integrating seamlessly** with the applications employees use every day.

- **Workflow**

Workflow is part of the base Laserfiche system. It was built by Laserfiche, and so offers powerful and efficient capabilities. Laserfiche comes with Workflow Designer, a powerful and easy to use workflow creator. It uses a graphical interface that requires no coding experience, and comes with a huge array of built-in activities, such as routing entries, setting deadlines, performing database lookups, applying security, etc. Although there are nearly 100 pre-defined workflow activities than can easily be configured to meet an organization's specific needs, workflows can be extended with custom activities using the SDK. Workflows can be configured to run on a schedule, or when user-defined conditions are met.

Laserfiche is integrated with Office 2003, 2007, 2010, and 2013. The integration provides the ability to send documents from Office applications directly to Laserfiche. With our Outlook integration, users can send an email and its attachments to Laserfiche as well as attach documents within the repository while writing the email in Outlook.

- **Records Management**

Laserfiche Records Management has inbuilt tools and features that enable workflow efficiencies, improve knowledge and information sharing, improve document find ability, decrease the duplication of records, and improve public access. Laserfiche Records Management transforms paper records into digital, accessible organizational assets.

### **Product Highlights**

- Auto-file newly created records according to industry regulations and corporate policies.
- Automatically notify records managers when a record needs to be archived or destroyed based on the record type and other parameters as defined by the NCPA.
- Generate reports to identify and locate records that are ready for disposition.
- Enforce records management policies across all devices including mobile phones, tablets, laptops and desktops by storing only one copy of a record in a centralized repository.
- Automatically classify and apply disposition schedules and other retention policies to incoming records; and
- Centralize records storage and group records based on their retention and disposition schedules.

### **Functions of Records Management include:**

- Identifying what records exist by records inventory.
- Applying required retention periods to stored items.
- Identifying the owner of each records series.
- Determining that a chain of custody and a proper audit trail both exist.
- Assisting in e-discovery issues and applying legal holds to records when needed.

- Managing disposition (disposal of documents).
- Developing and administering defined records policy and procedures, regardless of if the records are electronic or paper; and
- Preserving records throughout their life cycle.

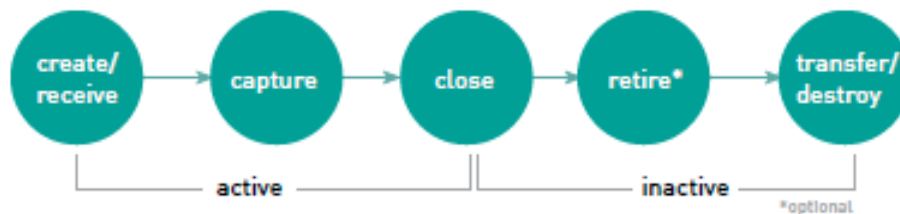
Laserfiche Records Management applications simplify the life cycle management of business records without interfering with your organization’s line of business. A records management application supports the automatic enforcement of consistent, organization-wide records policies and reduces the cost of regulatory compliance. Laserfiche records management applications protect records from loss and tampering, while allowing the records manager and other decision maker’s access to necessary information.

Laserfiche records management applications facilitate the capture, classification and ongoing management of records throughout their life cycle. Laserfiche records management applications commonly provide specialized security and auditing functionalities tailored to the needs of records managers, including:

- Improved efficiency in the storage, retention and disposition of records and records series.
- Detailed reports identifying records that are eligible for transfer, accession or destruction.
- Audit trails to track all system activity and the entire life cycle of records.
- Laserfiche records management applications enable the application of systematic controls and policies concerning the life cycle of those records that detail an organization’s business transactions. Records management applications allow organizations to file records according to a determined scheme, to control the life cycle of records, to retrieve records based on partial information and to identify records that are due for final disposition.

**The practice of records management involves developing policies for each stage of the records lifecycle:**

### Records Lifecycle



- Creating, approving, and enforcing records policies, including a classification system and a records retention policy.
- Developing a records storage plan, including the short- and long-term housing of physical records and digital information.
- Identifying existing and newly created records, classifying them and then storing them according to standard operating procedures.
- Coordinating access to and circulation of records within and outside the organization.
- Executing a retention policy to archive and destroy records according to operational needs, operating procedures, statutes, and regulations.

The main tool used to manage the disposition of records is the records schedule. A records schedule is the official policy for records and information retention and disposal. The schedule provides mandatory instructions for what to do with records, as well as non-record materials that are no longer needed for current business.

**Other benefits of using a records schedule are:**

- Ensure that the important records are organized and maintained in such a way as to be easily retrieved and identifiable as evidence of your activities (especially in the event of an audit, a FOIA request or discovery for a lawsuit).
- Conserve office space and equipment by using filing cabinets to house only active records.
- Saves money by the regular transfer of inactive files to less costly storage areas for subsequent disposition.
- Helps preserve those records that are valuable for historical or research purposes.
- Stabilizes the growth of records in offices through systematic disposition of unneeded records.

• **Records Storage**

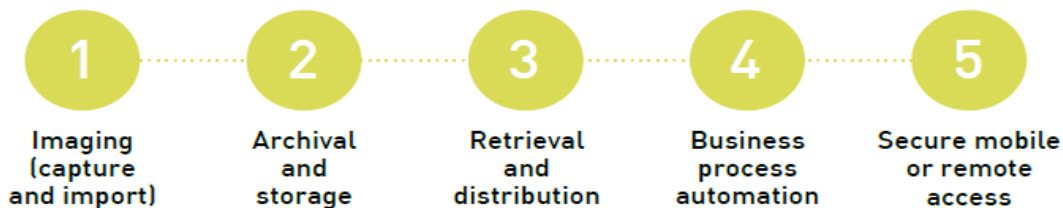
Laserfiche is fully supported to effectively store, manage, safeguard and retrieve your business records and documents. Documents scanned with Laserfiche software are stored as non-proprietary TIFs into the Laserfiche Repository. Storage will be stratified and architected to allow for fast response to higher volume of documents and slower response for lower volume documents and archived documents. All other documents are stored in native format. All industry-standard file systems and storage devices are supported.

• **Document Imaging**

Laserfiche provides highly automated document digitization functionality for both workgroup and workflow document processing requirements including Image Enhancement, File Conversion, OCR / Text Searchable PDF/A, Data Capture, Document Routing. Laserfiche provides a single capture platform that can meet all the needs of an organization: Document Scanning and Import, Forms Processing, Data Capture, OCR/ICR, Data Extraction and the ability to migrate the information into a document repository. Laserfiche can distribute among several machines which can provide an additional resource boost for high-volume imaging applications. Using Laserfiche document imaging technologies supports user indexing or entering metadata into the system and utilizes storage technology to save the digital version of the document. Laserfiche can store any form of documents regardless of size, dimensions, extension or point of origin. Any scanned document will be viewable using Laserfiche software and can be opened with its native application, Laserfiche can be used to manage any type of document or file.

• **Document Management**

The Laserfiche Document Management system covers the capture, store and archive paper documents and a variety of electronic files while allowing for secure accessibility at the time of need. Laserfiche Document Management has five basic components



Once digital versions have been created and stored in the document management repository, users can:

- Manage millions of documents and retrieve the right one in seconds.
- Share documents with colleagues while protecting confidential information.
- E-mail and fax files instantly.
- Access documents while traveling.
- Have a Backup of files and records for disaster recovery.
- Easily comply with various industry regulations including SEC, FINRA, HIPAA, Sarbanes-Oxley and more.
- Integrate with CRMs, proprietary software, or other third-party applications.

The Laserfiche Document Management System provides:

- **User-Friendly Interface:** Updates documents, adds document annotations, redacts confidential information, and changes document metadata from a single interface
- **Rich Search:** Instantly retrieves documents with quick and advanced search options tailored to individual users' security rights
- **Robust Metadata:** Adds, views, and modifies document metadata to index, search and retrieve documents.
- **Data Backup & Recovery**

We highly emphasize and stress the absolute importance of backup and disaster recovery. Hardware failure, viruses, user error, natural disasters, or any host of other problems can wipe out gigabytes of data in an instant which will take weeks or months to rescan and recreate. Laserfiche provides the capability of designing, implementing, and maintaining a dependable backup and recovery plan, which represents a crucial administrative task. Installing and running the Repository Backup summary generator, will help you quickly generate an HTML summary of the core Laserfiche repository components that you need to back up, and where each one is stored. We also provide the best practices for backup procedures and how to respond to disasters. In addition, our system can utilize your organization's data centers and backup data centers as well. Backups schedule will be daily, weekly full and monthly off-site. Removable media with encrypted backup will be utilized as appropriate. We will provide backups on premise but at least have monthly backups stored off-premises considering the Center's off premise storage site.

- **Secure Shredding**

GSG offers secure and confidential paper shredding and document destruction services. We recognize that information is one of the most important assets of any organization and must be protected as carefully as cash or inventory. We provide on-site, off-site, and on-demand shredding services. Our pickup service is designed to securely transport and handle large-volume shredding projects at an off-site facility, which is the most economical and convenient option for larger shredding. With reliable document destruction services, your files and important documents are carefully shredded, eliminating any risks associated with data security loss. We provide a certificate of destruction detailing the chain of custody and the time and location of the document shredding process.

- **Web-Form Software**

Laserfiche Forms offers quick, simplified data collection and processing for your entire organization. Our customizable web forms fit securely onto any website, making it easy for your customers and employees to submit information. Automated approval workflows and built-in auditing ensure that action is taken quickly, forms are never misplaced, and stakeholders are updated at every step.

- **Mobile Device Management**

With the Laserfiche Mobile app for iOS and Android, you'll never skip a beat—even if you're skipping the office. Whether you're traveling, on an offsite visit or working from home, you'll have access to your workplace documents and procedures at the touch of a button. Upload, review and approve files and track work all within a secure, compliant environment on your phone or tablet. Laserfiche Mobile App is a fully integrated component of both Laserfiche Rio and an optional add on for Laserfiche Avante.

- **Document Process Automation**

Laserfiche Process Automation provides many tools to automate business processes and reduce manual work. Graphical Workflow Designer: Automate activities, assign team and individual tasks, extract data, route documents, and more without requiring code Business Rules: Easily define and manage business policy logic such as decision tables and formulas, in a centralized place separately from process logic Data Management: Define data structures and store data independently of processes to provide a single source of truth for data Reporting and Analytics: Use out-of-the-box reports or create custom reports on process data for insights to make informed decisions.

Laserfiche allows users to capture information instantly and automate business processes instead of the traditional methods of using an imaging solution as an archival tool. Users are finding efficiencies by reducing the time processes take and giving users access to information instantaneously through the implementation of Laserfiche Workflow, resulting in cost savings for the organization.

- Laserfiche Workflow is powerful business process automation software that classifies, organizes, routes and archives documents.
- Create automated workflows with an intuitive, graphical design tool
- Integrate with a wide variety of enterprise applications to run repeatable processes
- Use more than 100 built-in activities to simplify third-party integration, offer easy customization and enhance administrative control
- Alert and direct users regarding their responsibilities for completing business process tasks
- Report on customizable steps in any workflow's progress
- Improve visibility into business process efficiency with instance details (including charts and statistics) about specific times a workflow ran
- Troubleshoot, optimize and report on system processes with an included search and reporting interface
- Trigger document changes from activity in line-of-business applications like CRM, GIS, ERP and others
- Apply trusted digital signatures to a document, as well as delete and retrieve information from them
- Automatically import PDF forms into Laserfiche, retrieve information from PDF fields and map them to Laserfiche fields

## 5.2 Products and Services

### 5.2.1 Discovery

Laserfiche provides a digital case management solution with a records management component that can play a key part in your overall eDiscovery planning. Digital case management systems protect and preserve electronic and physical documents as well as associated metadata, an increasingly important feature of eDiscovery. Physical documents are scanned into the system and maintained in electronic form—as either TIFF or ASCII files, both of which are non-proprietary and unalterable—and electronic documents, including e-mail messages, audio, and video recordings can be maintained in their native file formats, maintaining existing metadata and hidden information. Audit trail

capability can guarantee that documents kept in native file formats are not deleted or modified, maintaining their value in the eDiscovery process. We have extensive experience with document management utilizing numerous Government approved tools.

Adding records management capabilities to a document management system further strengthens an eDiscovery plan. The U.S. Department of Defense (DoD) has established functional requirements for computer systems used to manage electronic records, and **DoD Standard 5015.2 has become the de facto standard for records management software across a wide spectrum of industries.** DoD 5015.2 outlines the baseline functionality required for records management applications used by the U.S. Department of Defense and has been endorsed by the National Archives and Records Administration (NARA) as an “adequate and appropriate basis for addressing the basic challenges of managing records in the automated environment that increasingly characterizes the creation and use of records.” Records management applications that have been certified as DoD 5015.2-compliant provide the peace of mind that comes from objective, third-party evaluation. Records management applications commonly provide specialized security and auditing functionality tailored to the needs of records managers, including:

- Improved efficiency in the storage, retention and disposition of records and records series.
- Detailed reports of which records are eligible for transfer, accession, or destruction.
- Audit trails to track all system activity and the entire life cycle of records.

### 5.2.2 Required Tasks

	NCPA Task	GSG's Solution
A	On-site assessment/ discovery interview sessions, with teams from Participating Agency's departments/ divisions, to identify record repositories and processes that result in the generation of records from the following departments.	Discovery/assessment both require interview sessions with teams from participating agencies' departments and divisions. It's essential to identify the record repositories as well as processes that result in the generation of the records from all the departments. Highly researched and well-prepared interview sessions are what GSG will be known for. They will be up with the best research in each department and will leave no brick unturned for the best level of data discovery and assessment. All modern methods will be employed for this.
B	Assess current records requirements by the Participating Agency and types of records Generated (e.g., data, documents, messages, hardcopies, electronic/ soft copies, etc.)	All forms of records will be covered as mentioned here.
C	Systems utilized to store records for both current and legacy documents.	Laserfiche allows the storage of both current and legacy documents in the centralized repository. A repository can store a document after deactivation and serve as a legacy document if the document is found eligible to serve as a legacy in the future.
D	Current taxonomy and metadata implemented.	Taxonomy is essential and proper metadata usage for that is essential. GSG ensures the best metadata implementation, which its

	<b>NCPA Task</b>	<b>GSG's Solution</b>
		solution captures automatically using OCR/ICR technology.
E	Existing data inventory systems from offsite record storage providers.	A proper cloud storage mechanism or use of a storage mechanism like TB of external storage devices will be used for transfer. GSG recommends the use of mechanisms from AWS and Azure as they are the best. The best is the AWS snow family, covering Snowcone, SnowBall, and Snow Mobile. Azure Databox is another option.
F	Systems utilized to store records for both current and legacy documents.	Laserfiche is installed in the cloud and uses an AWS S3 bucket. However, GSG assures that it will be using low-cost AWS S3 Glacier for archival. Similarly, GSG will use better storage units for data required more frequently. We will ensure the most cost-effective data storage plan for your requirements. The same strategy will be applied while selecting Azure options if Azure is selected for your requirements.
G	Evaluation of adherence to the current Retention Schedule/Record Destruction Policy - Identification and evaluation of records generated (hard copy and/or electronic) - Applicable federal, state, and local laws/regulations.	Laserfiche solution complies with the current retention schedule/record destruction policy and applies to all federal, state, and local laws and regulations.
H	Current system used for record storage (current and archived).	Data can be stored in the repository and installed over the AWS or Azure cloud or on-premises according to the Department's demands and requirements.
I	Areas of potential record duplication.	GSG creates workflows for catching duplicate records and merging them if required.

### 5.2.3 System Capability

	<b>NCPA Task</b>	<b>GSG's Solution</b>
A	Be Compatible with all modern web browsers (Edge, Firefox, Chrome, Safari, etc.)	Laserfiche is compatible with all modern web browsers including Internet Explorer, Firefox, Chrome and Safari on both Windows and Mac OS.
B	Utilize a mobile-friendly, responsive design that is compatible on iOS and Android Mobile devices	Laserfiche is fully compatible with all iOS, Android, and Windows devices. In addition to the standard desktop client, we provide first-party native iPhone and iPad apps, and a web client with a mobile-optimized version to accommodate virtually any mobile device
C	Allow Participating Agency System Administrator to configure role-based	Laserfiche fully supports role-based security. The specific user role can be defined in the Administration Console, with all the



	NCPA Task	GSG's Solution
	permissions And individual user permissions.	appropriate rights and privileges. Any user classified as having that role will inherit the same set of security rights.
D	Allow users to enter search parameters to locate documents by reference number, application name, document type, date received, site address and other entered Attributes.	Laserfiche bundles OCR and full-text indexing capabilities and utilizes a proprietary indexing structure and full-text search engine. In addition to indexing every word on every page, we index their locations which allows us to highlight search parameters on images, automatically redact index information when images are redacted and simplify the use of markup tools such as underline and redline. Laserfiche provides the ability to index the text of electronic documents using iFilters. Indexing can also be applied at the document and folder level through fields and templates where templates are simply collections of fields. Fields are user defined and can be customized to meet an organization needs through configuration of data type, drop-down list, format masks and dynamic properties.
E	Allow Participating Agency Application Administrator to configure new folders, subfolders, document attributes, and document types without Contractor's assistance. Administrator can select whether confidential folders are visible in the customer-facing Interface.	Out-of-the-box functionality
F	Allow Users to configure their own search parameters to enable searching by a variety of attributes, for example: reference number, date received, and document type.	Laserfiche bundles OCR and full-text indexing capabilities and utilizes a proprietary indexing structure and full-text search engine. In addition to indexing every word on every page, we index their locations which allows us to highlight search parameters on images, automatically redact index information when images are redacted and simplify the use of markup tools such as underline and redline. Laserfiche provides the ability to index the text of electronic documents using iFilters. Indexing can also be applied at the document and folder level through fields and templates where templates are simply collections of fields. Fields are user defined and can be customized to meet an organization needs through configuration of data type, drop-down list, format masks and dynamic properties.

	<b>NCPA Task</b>	<b>GSG's Solution</b>
G	Have options for onsite, cloud-based storage and hybrid-based storage	Out-of-the-box functionality
H	Allow Participating Agency to retain ownership of the data stored on the platform and the Ability to extract it in full at any time.	The Agency will maintain ownership of all data stored on Cloud platform and can extract entire repository at any given time.
I	Allow the direct import of common electronic document types (such as, but not Limited to: TIF, PDF, JPG, Microsoft Office standard formats such as docx and xlsx).	Allow the direct import of common electronic document types (such as, but not Limited to: TIF, PDF, JPG, Microsoft Office standard formats such as docx and xlsx).
J	Be easy to navigate, user-friendly user interface.	Laserfiche provides a full-stack ECM solution that can be rapidly deployed and is easy to use because all actions can be performed through a single user interface. Because we have developed all the components of the solution internally, we are able to bundle functionality such that all users of the system have all the tools necessary to do their job which simplifies budgeting and long-term planning.
K	Allow for add-on for Microsoft Office Integration to enable import of emails directly into system.	Laserfiche has a strong integration with the full Microsoft Office Suite. Out of the box functionality includes the ability to save to Laserfiche directory from Outlook as well as map email indexing information to metadata fields in Laserfiche.
L	Allow for files can be uploaded by using a drag-and-drop system.	Out-of-the-box functionality
M	Allow Application administrator to upload document templates for use by users.	Out-of-the-box functionality
N	Enables storage of application presentation documents, such as PowerPoint files, photographs, and videos	All document types and sizes are fully supported by default and will be stored within the Laserfiche repository.
O	Identify duplicate documents within a folder	Using advanced search Query, we can identify duplicate documents within a folder

#### 5.2.4 Customer Facing Interface

	<b>NCPA Task</b>	<b>GSG's Solution</b>
A	Include a count of the total number of documents in a folder,	It's possible through the workflow method. We need to create a workflow for counting the number of documents inside a folder.
B	Enable the downloading and printing of documents,	Laserfiche has the capability of downloading and printing documents according to the Department's requirements.
C	Allow Administrator to redact sections of documents from public view if needed. Printed and downloaded documents include the redaction in the downloaded version,	Laserfiche redaction process is quite easy and simple. You can leverage more features, like adding items like words to be redacted. GSG ensures intelligent redacting capabilities from within the Laserfiche workflow. Many more features are possible and printed and

	NCPA Task	GSG's Solution
		downloaded documents include the redaction in the downloaded version.
D	Ability to generate hyperlinks to specific documents within the system to allow these to be used in reports, emails, etc.	Laserfiche allows you to create hyperlinks to connect directly to folders, documents, pages, versions, and these can be used in reports, emails, etc., Email links for attachments to the emails and various documents are also possible.
E	Ability to select different languages and/or photos within the interface.	Globalization is possible in Laserfiche solution, which will use Google translate for changing different languages. Allows photos within the interface.
F	ADA Compliant Interface.	Laserfiche solution is ADA compliant and ensures to provide access to disabled people. Laserfiche has the capability of implementing screen readers, and the images alt text is provided plus both audio and visual versions for all text and makes Laserfiche ADA compliant.
G	At-a-glance status of applications based on input meta-data (i.e., meta-data and attributes can be added to application folders in addition to documents within folders to enable application status to be published/summarized via a page on the Participating Agency's Website.	When someone uploads documents through Laserfiche forms, there is an option to attach the template to that form and allows you to customize the documents and folder directory path where the documents will be stored. That form then uploads all similar documents and adds metadata to those documents, which enables application status to be published/summarized via the page on the participating agency's website.

### 5.2.5 Reporting and Management

	NCPA Task	GSG's Solution
A	System generates reports of number of documents accessed, imported, uploaded, edited and deleted. Results can be refined by user.	Laserfiche generates and tracks all versions of reports and allows access through importing, uploading, editing, and deleting. Users can easily track what changes are made.
B	System collects information on when documents are accessed/ viewed/ modified and downloaded.	By using version tracking, Laserfiche collects information on when documents are accessed, viewed, modified, and downloaded.
C	System can generate reports on total size of all data stored in the system and, depending on whether system is cloud-based, where data is being stored.	There are different processes for creating reports through form data and business process data. As an example, you can create a form and sort out the total amount of data in the system. Then you can import that form field in.xls or.csv and set the starting rule to start automatically as per the schedule the user wants the report to be published. The total data records can be fetched through forms, may be on the cloud or anywhere. We

		only need to use that license for connection and do all that within it. However, fetching such information from other licenses after proper authentication is also possible.
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### 5.2.6 Testing

GSG performs intense testing of the DMS functions/solutions, including NCPA requirement and overall performance of the solutions. GSG fixes any bugs; makes corrections as requested.

#### System Testing

At system testing level that validates the complete and fully integrated software product. This test is to evaluate end to end system specifications. The software is interfaced with other software/hardware systems. In this test GSG will fully test to evaluate the system’s compliance with the specified NCPA requirements.

#### Integration Testing

Integration Testing is a testing where individual units are combined and tested as a group. The purpose of this level of testing is to expose faults in the interaction between integrated units. The test results show if integration can provide smooth interaction of integrated systems taking into account various systems’ constraints and peculiarities. Using this test NCPA can get Verification of integration with your ext. systems and Verification of the systems which are integrated to Laserfiche as separate modules.

#### Stress/performance testing

At GSG, Performance tests determine end-to-end timing (benchmarking) of various time-critical business processes and transactions under low load but with a production-size database. As a result, the NCPA gets information on how well the software performs under normal, unusual, and abnormal circumstances, establishing the maximum load, traffic, data, and other parameters the system can handle.

#### User acceptance testing (UAT)

Before implementing the new system into operation, we at GSG generally do a test run of the system to remove all the bugs, if any. It is an important phase of a successful system. The output of the test run matched the expected results. Sometimes, system testing is considered as a part of the implementation process.

User Acceptance Testing is conducted to ensure that the system satisfies the needs of the business as specified in the functional requirements and provides confidence in its use. Modifications to the said requirements will be captured and tested to the highest level of quality allowed within the project timeline. The primary objective of is to provide confidence that the delivered system meets the business requirements.

GSG’s User Acceptance Testing (UAT) is a process to obtain confirmation that a project meets mutually agreed-upon requirements. User tests, usually performed by clients or by end-users, do not normally focus on identifying simple problems such as spelling errors and cosmetic problems, such as software crashes; testers and developers previously identified and fixed these issues during earlier unit testing, integration testing, and system testing phases.

This testing will be undertaken by a Subject-Matter Expertise (SME), preferably by GSG and will provide a summary of the findings for confirmation to proceed further. UAT acts as a final Verification of the business functionality and proper functioning of the system, matching the real-world usage conditions. If the software works as required and without issues during normal use, one can reasonably conclude the same level of stability in production.

### 5.2.7 Training

At GSG, we understand the level of requirements for training and transfer of knowledge on the implementation of the system. We will work with the NCPA to streamline your business process to best utilize additional functionalities available in the new integrated system. We will provide training materials and training using a train the train approach, and system administrative staff. In addition, GSG will provide Level 1 support documentation and specific training for each end user group. Our team will also develop user-friendly training materials and eLearning modules for NCPA use post-implementation. Training will be provided to your staff and other end users at an NCPA -provided facility. We will also provide up-to-date training sessions for specific user groups to ensure successful implementation, with an overview of ongoing refresher training options to select from. The training will be performed on-site and will include an overview of all system components, identification of resources for ongoing support, and training of the technical staff on all components of the system. We will ensure that your users possess a complete understanding of the application integration tools and their uses. We have included training costs in the pricing section.

#### End-User Training Approach

End user training is targeted at users who will be using the system on a day-to-day basis. This can include power users who scan documents and regular users who will be performing search and retrieve operations. The following concepts will be covered during an eight-hour training course:

End-User Training Agenda	
Laserfiche Client Overview	Laserfiche Capture
Repository Structure	Entering & Recording
Folder Browser	Metadata
Working with Documents	Quick Fields
Annotations	Scanning Options
Merging Document Pages	Scanning Processes and Enhancements
Separating Document Pages	Import
Document Viewer	Snapshot
Display Panes	Drag & Drop
Tools	Copy & Paste
What is Metadata?	Microsoft Integration
Laserfiche Searching	Converting Electronic File Formats
Search options	Generating Searchable Text
Saving searches	Distribution in Laserfiche
Tips and tricks	Exporting
	Emailing
	Printing

While it is vital to ensure that your Laserfiche systems are current, it is equally vital that personnel using Laserfiche are kept current through training, and we will provide ongoing training opportunities. Training sessions can include workshops, webinars, and other eLearning options. Should any patches or updates alter the operation of your system, we will arrange training sessions or user group meetings in order to ensure that personnel remain fully up to date with the knowledge and practices necessary to get the most out of Laserfiche. We will also facilitate access to other training programs hosted by Laserfiche.

#### Train the Trainer Approach

Laserfiche is an intuitive application to learn — part of its enduring power is its simplicity of use. GSG’s training program is designed for clients to gain autonomy and independence in the routine use

and management of their Laserfiche system with a ‘train the trainer’ approach. We have found this to be the most effective training methodology in terms of knowledge retention and maximizing the value of training time.

**Ongoing Training**

System Administrator training is targeted to users that will be maintaining the system once it has been promoted to production.

Application training targets business analysts that may be involved in modifying existing business processes or expanding the use of Laserfiche into other departments.

System Administrator Training will cover the tasks necessary to administer the software, such as adding, removing, and modifying users and user rights. In addition, training will be provided to administer workflows and create ad-hoc reports and queries. We highly recommend that system administrators also participate in user training.

Attendees can include managers, supervisors, and technical personnel as determined by the client. Multiple sessions may be scheduled to minimize the impact on normal operations, and GSG personnel will be on site to assist with any issues that may arise during go-live. System Administrator Training will include the following material in five hours of training:

System Administrator Training Agenda	
Laserfiche Administration	Indexing
Laserfiche Administration Console	Troubleshooting
Sever Settings	System Maintenance
Security	Repository Management
Audit Trail Report Creation/Generation	Metadata Management

**Additionally, we offer special training for the following:**

- **Laserfiche Workflow Admin Training**

This hands-on training is for users who will be designing Workflows within the Laserfiche system. This class is not exclusive to IT, but users should be technically savvy and familiar with IF/THEN logic. Some of the topics covered in this training are: Parallel and Conditional Routing, E-mail Notifications, Reminders/Deadlines, and Repeat/Looping related to business processes. Laserfiche Client and System Admin Training is a prerequisite for this class.

- **Application Training**

Target’s business analysts who may be involved in modifying existing business processes or expanding the use of Laserfiche into other departments.

- **Laserfiche Forms Training**

This hands-on training focuses on the design and configuration of electronic fillable forms.

- **Laserfiche Quick Fields Training**

This hands-on training is for users who will be creating Quick Fields Sessions. Typically, this training is restricted to IT or multiple people. Once a Session is created, it can use Power Users of Laserfiche as. As such, only interested parties should attend. Class material is dependent on the purchase of Quick Fields. Laserfiche Client Training is a prerequisite for this class.

- **Laserfiche Audit Trail Training**

This hands-on group training is for users who will be generating or viewing audit reports on the Laserfiche Repository. Laserfiche Audit Trail is typically used to investigate the viewing, retrieval, or export of a document from the Laserfiche Repository. This class is typically limited to administrators and power users with comprehensive access to the Laserfiche Repository. Laserfiche Client Training is a prerequisite for this class.

- **Laserfiche Records Management Training**

This hands-on training covers basic records management concepts for records managers and for general staff.

- **Integration Training SDK / LF Connector**

This training applies to using the Software Developer’s Kit (SDK) and/or LF Connector to integrate Laserfiche with a specified line of business applications.

- **Laserfiche Scanning Training**

This group training is for users who will be scanning documents using Laserfiche Scanning. Topics discussed in the training are indexing, shortcut keys, batch processing techniques, and cleanup tools.

- **Search and Retrieval Training**

This session includes detailed instruction on the various methods for searching within Laserfiche, including Quick Search as well as the Customize Search option for more advanced search criteria. This session also covers search results and what information is returned, how to open and view documents, and how to utilize the information returned.

### Knowledge Transfer

Before, during and after your project, we focus on ensuring the NCPA users are trained on the Laserfiche software and stay up to date on the features available. Our Project Managers are highly trained in the areas of implementation, Workflow processes, integrations, and more to help your organization implement a well thought out Enterprise system based on NCPA needs. They are Laserfiche Gold Certified and hold other professional certifications to maintain a high knowledge level of our client’s business processes. At GSG, we know that knowledge transfer/support and training is important, we will place a dedicated staff to answer questions as needed who will also manage the knowledge transfer and product training development and documentation.

### 5.3 Deliverables

**A. Work Plan/Timeline: Provide work timeline with estimated days/hours required to complete the Discovery/Assessment of Existing Records, System, and Procedures.**

Documents and Records Management solutions have a great deal of variation in terms of size, components, customizations, and integrations. This makes it impossible to provide anything like an accurate work plan – there is no “average” implementation project. We do, however, have a standard template identifying the phases of every project, which will be modified and finalized through discussions with each customer.

Laserfiche Generic Schedule Template

Task Name	Start	Finish
<b>Project Kick-off Meeting</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Requirement Gathering & SOW	Month XX, 20XX	Month XX, 20XX

Task Name	Start	Finish
Requirement Understanding for Licensing, Architecture, Installation	Month XX, 20XX	Month XX, 20XX
Requirement Understanding for Development & Implementation, Integration, Migration & Reports	Month XX, 20XX	Month XX, 20XX
SRS Documentation	Month XX, 20XX	Month XX, 20XX
<b>Gather Pre-requisites for Installation (Service accounts configuration, Servers, Database)</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Get the development software/tools, accounts for configuration, Server details & Database details	Month XX, 20XX	Month XX, 20XX
<b>License Manager Installation &amp; Configuration</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
License Manager Installation & Configuration (Configure application, assign licenses)	Month XX, 20XX	Month XX, 20XX
<b>Development Server - Installation &amp; Configuration</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Database Server, ECM Server	Month XX, 20XX	Month XX, 20XX
Client, Admin Console	Month XX, 20XX	Month XX, 20XX
Workflow Server, Workflow Designer	Month XX, 20XX	Month XX, 20XX
Web Application Server, Mobile App Server	Month XX, 20XX	Month XX, 20XX
LF Forms	Month XX, 20XX	Month XX, 20XX
Audit Trail Server	Month XX, 20XX	Month XX, 20XX
Records Management	Month XX, 20XX	Month XX, 20XX
Capture tools - Import Agent, Quick Fields	Month XX, 20XX	Month XX, 20XX
<b>Production Server - Installation &amp; Configuration</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Database Server, ECM Server	Month XX, 20XX	Month XX, 20XX
Client, Admin Console	Month XX, 20XX	Month XX, 20XX
Workflow Server, Workflow Designer	Month XX, 20XX	Month XX, 20XX
Web Application Server, Mobile App Server	Month XX, 20XX	Month XX, 20XX
LF Forms	Month XX, 20XX	Month XX, 20XX
Audit Trail Server	Month XX, 20XX	Month XX, 20XX
Records Management	Month XX, 20XX	Month XX, 20XX
Capture tools - Import Agent, Quick Fields	Month XX, 20XX	Month XX, 20XX
<b>Development/Implementation</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Configuration	Month XX, 20XX	Month XX, 20XX
Templates, tags, metadata, groups, users Configuration	Month XX, 20XX	Month XX, 20XX
Folder Configuration	Month XX, 20XX	Month XX, 20XX
Implement Security (Provide access rights for templates, fields, users and folders)	Month XX, 20XX	Month XX, 20XX
Configure document capture tools & activities	Month XX, 20XX	Month XX, 20XX
Implement Workflows/Business Process, Forms, Portal	Month XX, 20XX	Month XX, 20XX
Record retention policies (Archival Configuration)	Month XX, 20XX	Month XX, 20XX



<b>Task Name</b>	<b>Start</b>	<b>Finish</b>
<b>Import Data</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Import documents to test Development Configuration	Month XX, 20XX	Month XX, 20XX
Import/apply metadata to test indexing, search, workflow execution	Month XX, 20XX	Month XX, 20XX
<b>Data Migration for Testing</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Data Migration for testing	Month XX, 20XX	Month XX, 20XX
Application Integration & Reports	Month XX, 20XX	Month XX, 20XX
User Interface/Integration Interface Development	Month XX, 20XX	Month XX, 20XX
<b>Deployment (on Production Server)</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Import Configuration	Month XX, 20XX	Month XX, 20XX
Templates, tags, metadata, groups, users Configuration	Month XX, 20XX	Month XX, 20XX
Folder Configuration	Month XX, 20XX	Month XX, 20XX
Implement Security (Provide access rights for templates, fields, users and folders)	Month XX, 20XX	Month XX, 20XX
Configure document capture tools & activities	Month XX, 20XX	Month XX, 20XX
Implement Workflows/Business Process, Forms, Portal	Month XX, 20XX	Month XX, 20XX
Record retention policies (Archival Configuration)	Month XX, 20XX	Month XX, 20XX
<b>Data Migration</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Data Migration	Month XX, 20XX	Month XX, 20XX
Host Application Integration & Reports	Month XX, 20XX	Month XX, 20XX
User Interface/Integration Interface Development	Month XX, 20XX	Month XX, 20XX
<b>UAT</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
UAT	Month XX, 20XX	Month XX, 20XX
Documentation	Month XX, 20XX	Month XX, 20XX
Documentation	Month XX, 20XX	Month XX, 20XX
<b>Training</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Training	Month XX, 20XX	Month XX, 20XX
<b>Production Server - Release (GO-LIVE)</b>	<b>Month XX, 20XX</b>	<b>Month XX, 20XX</b>
Production Server - Release (GO-LIVE)	Month XX, 20XX	Month XX, 20XX

**B. Findings Report with comprehensive findings resulting from the assessment/evaluations and onsite meeting completed.**

Reports can be generated in.xls,.csv, or pdf, and the data can be imported from Laserfiche forms fields, as well as through various other means for the business process data. And the detailed findings report with comprehensive findings from the assessments/evaluations, which can be done through forms or business process automation, can be generated automatically, and posted as per a schedule automatically by setting starting rules.

**C. Key Stakeholder Meeting: Conduct one on-site presentation of the gap analysis findings identified from the assessment/ evaluations and onsite meetings to the Participating Agency's identified project team.**

Depending upon the length of the project, GSG conducts key stakeholder meetings, including key stakeholders, project managers, and contracting officers, yearly or quarterly. We will provide gap analysis documents/reports for all details of assessment/evaluation and onsite meetings. The gap analysis report includes changes to the system and time to ensure the work on the gaps is completed.

**D. Suggested retention processes that are applicable across various record generating processes and systems.**

Laserfiche allows retention processes for all documents. The following are the three major components of a successful records retention strategy, such as retention schedules, retention policies, and records infrastructure.

The retention process must be properly created by the Department. And they are free to create it at each document level independently and without any interference. However, details are shared with stakeholders and CO to ensure the best level of security. It is created by the Administrator of the Department.

**E. Include costs and strategies for implementing such automated processes across different enterprise systems.**

GSG will work with individual customers to identify their needs, access their budget and overall timeline, and then provide an appropriate cost estimate to implement various automated processes across multiple enterprise systems. The timeline and cost model will differ from customer to customer based on factors like their requirements, available budget, timeline, urgency, pain points, complexity of the project, etc.

**F. Reduction of impacts to existing and future document users and resources, including processes that access, use, generate, store or destroy documents (including minimizing new requirements, responsibilities and processes related to managing documents).**

At the extreme level, metadata information related to each document is disposed of permanently, and at the next lower level, these documents are archived. Hence, document details based on a requirement can be fetched anytime, and hence new requirements are minimized, as well as responsibilities and processes related to managing documents. Proper archiving and saving of some metadata information while disposing of it ensures the above requirements.

**G. Recommendations on maximizing the availability and accessibility of documents for business and transparency purposes.**

Proper role-based access with the help of Active directory, via Laserfiche, can help in maximizing the availability and accessibility of documents for business and transparency purposes. All this is possible through Laserfiche and Active Directory Integration. And Laserfiche has been developed keeping the cyber security controls in mind, and hence data cannot leak out of it. A proper Disaster recovery plan is prebuilt for fighting in the worst situation.

**H. Recommendations on minimizing the long-term costs associated with managing documents of all forms, including costs associated with onsite and offsite document filing, storing and retrieving, as well as storing and backing up electronic documents.**

GSG will work with each customer to analyze their long term needs for accessing the documents (in physical and digital form) and recommend digitizing all documents into the centralized Laserfiche database. GSG will also recommend indexing strategies which can be

used to retrieve documents easily with having a need for someone to be present in person in the office.

**I. Recommendations on minimizing Participating Agency’s liability associated with retaining and destroying documents and comply with applicable regulations and laws.**

The participating agency will only require providing the policy for retention and destroying the documents and GSG will set the policy to work automatically in Laserfiche which will ensure all required compliances with regulations and laws, and this will in turn reduce the burden on the participating agency.

**J. Document destruction, transference and conversion guidelines.**

Once the Public Agency receives, reviews, and accepts the digital files, GSG will request written approval to shred the original documents so we can initiate the shredding services. Our team provides cost-effective secure, convenient, and environmentally friendly shredding services. We handle all the documents with a consistent Chain-of-Custody, resulting in a tightly controlled, documented process. Our team will provide the signed certificate of destruction, verifying what documents have been destroyed, the date of destruction, the approval to destroy the document, and that the security of the documents was safeguarded through the entire destruction process.

We understand the legal requirements of securely shredding the documents. When you need to have stored records destroyed, the process must be accurate and secure. GSG takes exceptional care on both counts. The Public Agency will determine the records to be destroyed. If you are using our advanced retention services, we can provide you with a Destruction Eligibility Report that lists the records due for destruction. Either way, the Public Agency will review and verify the records to be destroyed. Then, before proceeding, we send a destruction list for final approval. This step provides an additional layer of control to ensure that only approved items are authorized for destruction. We do not proceed until we have confirmation and an authorized signature.

**K. Identify space (internal or external) and equipment necessary for filing records. Determine if offsite records storage can be reduced for cost reduction for the Participating Agency.**

Final estimates of the project details will be discussed with the Public Agency after the discovery/assessment phase is done. The following are some of the equipment details required, such as scanners, laptops, and cloud access to software like Snowball or Databox for offsite data transfer to the cloud or onsite. And yes, offsite record storage can be reduced as now everything will be digital and on the cloud, which will result in a huge cost reduction as well as greater data security.

**L. General guidance on executing strategies for successful adoption of new policies, processes and procedures.**

Successful adoption of new policies, processes and procedures is reliant on personnel buy-in. GSG believes that including representatives from any group that will be affected by any changes creates a sense of ownership of that change, whether policy or new software, or any other change. By creating a sense of ownership, those involved will have a greater understanding of the benefits and reasons for the change, and can pass that knowledge to other members of their group, resulting in faster acceptance and adoption.

**M. Recommendations for change management, training and other ongoing program management activities such as self-auditing.**

GSG provides assistance and recommendations for change management, training, and other ongoing program management activities such as self-auditing, and all forms of auditing requirements.

**N. Additional recommendations as needed.**

GSG is happy with the current project setup and ensures to provide full support to work with the Public Agency to complete the project successfully.

**O. Work Plan/Schedule for recommendations and strategies (including milestones and phases).**

We have implemented several document management systems of similar scale, including projects for the Department of Health & Human Services, the Department of Agriculture, and the State Department. We have utilized our knowledge and experience for these types of projects to develop an implantation plan and timeline based upon your requirements. GSG’s high level milestones and phases are outline here for Laserfiche product services:

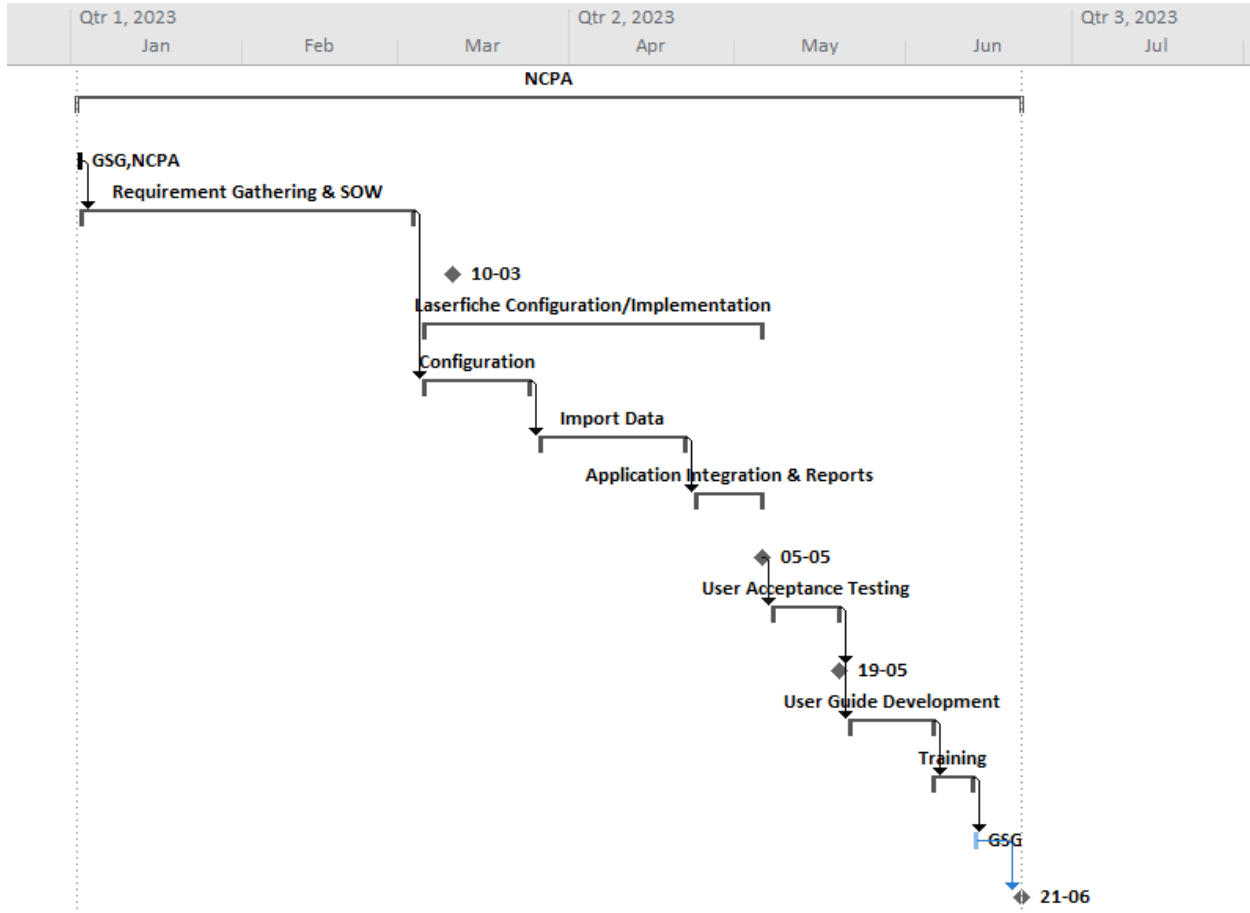
**Tentative Schedule**

Task Name	Start	Finish
<b>NCPA</b>	<b>January 2, 2023</b>	<b>June 21, 2023</b>
<b>Project Kick-off Meeting</b>	<b>January 2, 2023</b>	<b>January 2, 2023</b>
Requirement Gathering & SOW	January 3, 2023	March 3, 2023
Requirement Understanding for Licensing	January 3, 2023	January 24, 2023
Requirement Understanding for Implementation, Integration, Migration & Reports	January 25, 2023	February 14, 2023
SRS Documentation	February 15, 2023	March 3, 2023
<b>Baseline Requirement Specification Document</b>	<b>March 10, 2023</b>	<b>March 10, 2023</b>
Laserfiche Configuration/Implementation	March 6, 2023	May 5, 2023
Configuration	March 6, 2023	March 24, 2023
Import Data	March 27, 2023	April 21, 2023
Application Integration & Reports	April 24, 2023	May 5, 2023
<b>Application Configuration completion</b>	<b>May 5, 2023</b>	<b>May 5, 2023</b>
User Acceptance Testing	May 8, 2023	May 19, 2023
<b>Project UAT sign-off</b>	<b>May 19, 2023</b>	<b>May 19, 2023</b>
User Guide Development	May 22, 2023	June 5, 2023
Training	June 6, 2023	June 12, 2023
<b>GO-LIVE</b>	<b>June 13, 2023</b>	<b>June 13, 2023</b>
<b>Project Sign-off</b>	<b>June 21, 2023</b>	<b>June 21, 2023</b>

**Phases**

Phases	Start	Finish
Project Kick-off Meeting	January 2, 2023	January 2, 2023
Baseline Requirement Specification Document	March 10, 2023	March 10, 2023
Application Configuration completion	May 5, 2023	May 5, 2023
Project UAT sign-off	May 19, 2023	May 19, 2023
GO-LIVE	June 13, 2023	June 13, 2023
Project Sign-off	June 21, 2023	June 21, 2023

### Timeline



## **Tab 8: Value Added Products and Services**

## 8. Tab 8: Value Added Products and Services

### Benefits of Laserfiche Products for Documents and Records Management.

- ❖ Laserfiche provides user-friendly functionality.
- ❖ Laserfiche's fast and precise search capabilities enable faster responses to requests for information, improving your customer service.
- ❖ Reduce misfiling, damage, and loss of documents with Laserfiche's automated full-text indexing and easy search capabilities.
- ❖ Once documents are stored in the Laserfiche system, you can share up-to-date documents and reduce time spent on doing repetitive tasks like manually searching for and photocopying documents and focus instead on quality assurance and information integrity.
- ❖ With full text searches with fuzzy logic, proximity searches, lines of context, and highlighting of the words you were searching for, Laserfiche is the fastest and most powerful search engine on the market!
- ❖ Working with Laserfiche Records Management Edition™ means you can entrust your records to a solution that has been tested against the exacting DoD 5015.2-STD standards.
- ❖ Laserfiche provides a single familiar interface for capturing and managing paper documents, email, and other electronic documents.
- ❖ Batch processing automatically extracts data from many forms, eliminating the need for manual indexing, sorting and filing.
- ❖ Validation rules ensure compliance and consistency when collecting data is associated with any business process.
- ❖ Intelligent Routing and Notification automatically sends information to schedule officers and other managers, alerting them to new tasks with automatic emails.
- ❖ Version Control tracks who made changes, what those changes were, when they were made, and where all the versions of a document are located.
- ❖ Laserfiche Audit Trail monitors and records all the activities that occur during business process transactions, and web-based reporting enables organizations to identify trends and isolate behavior patterns, expediting audits and improving efficiency.

### Key Features of Laserfiche Product and Solutions

#### Get up and running quickly with Laserfiche

Store documents in intuitive folder structures in a familiar interface.

- Find documents easily within organized folder structures.
- Automatically file documents upon import.
- Easily duplicate existing filing structures.
- Navigate and preview content with thumbnails of document pages.
- Make scanned and electronic files full-text searchable with optical character recognition (OCR).
- Save changes with document check in/out

#### Add context to digitized documents

- Facilitate document updates with a unified metadata system
- Create reusable document fields that note key document information, like document author and approval time
- Build standard document templates that can be applied to different documents or folders.
- Connect related documents, like e-mails and their attachments, using document links.
- Track, display and compare document versions.

- Sign and validate documents with digital signatures.

### **Apply annotations to documents**

- Modify information directly on pages, text, and even images
- Hide sensitive material from unauthorized users with redaction tools.
- Add instructions or comments with document sticky notes, call out boxes and text boxes.
- Apply public or personal stamps, such as “Date,” “Approved,” “Confidential” and other indicators.
- See a complete list of a document’s annotation history, including type, date and included text

### **Find documents with one click**

- Find specific words or phrases within document text, metadata, annotations and entry names.
- Use preset search options to search by document creation date, the names of users who checked out documents and other metadata.
- Enable fast user adoption with customized document viewing and search settings.
- Instantly generate searchable text on scanned documents using optical character recognition (OCR) and full-text indexing.
- Find content that includes related words or phrases in search results.
- Perform routine searches in one click with custom quick searches that save search preferences.
- Find documents associated with specific business processes

### **Import information instantly**

Laserfiche’s built-in scanning interface connects directly to your scanner to process paper documents from any file format. Document imaging management has never been easier

- Clean up image quality and apply enhancements to scanned documents.
- Make all incoming documents full-text searchable for future search and retrieval.
- Automatically separate and sort scanned documents into the right folders.
- Schedule automatic import with digital document imaging.

### **Capture documents from mobile devices**

The Laserfiche Mobile app offers a mobile document imaging system to create content and work with documents on iOS, Android and Windows devices. It’s your own mobile document imaging system.

- Turn photos taken with phones and tablets into digital documents.
- Make all content captured on mobile devices full-text searchable.
- Initiate and participate in automated business processes from anywhere.
- Capture fragile, archival, or odd-size text documents and transform them into digital, searchable files without purchasing a specialized scanner.

### **Capture electronic documents**

Our document imaging system connects directly with standard office tools.

- Save documents directly from Microsoft Office applications.
- Drag-and-drop electronic files into document repositories for easy storage.
- Convert working documents into archival formats for permanent storage.
- Import documents from e-mail, including attachments, with one click.



### **Accelerate high-volume capture**

Reclaim time spent importing, processing, and indexing paperwork.

- Reduce manual scanning and indexing by capturing precise pieces of information from paper and electronic documents.
- Automatically sort and categorize incoming documents, fill out fields and create folder paths based on image data, barcodes, page size and more.
- Capture information from databases to simplify metadata import.
- Initiate document routing workflows based on document processing

### **Automate business processes with Laserfiche**

Trigger document routing and processing when new content is created.

- Create new folders and update document fields when content is created.
- Kick off routing and approval workflows when web forms are submitted.
- Schedule high-volume batch processing of routine incoming documents.

Speed document review and approval

- Track exactly where documents are and who is working on each document.
- Enable simultaneous review and approval by routing documents to multiple users.
- Ensure tasks are completed on time with automatic recurring notification emails.
- Present users with a full history of all business process steps related to a document.
- Automatically send notifications when documents are created, edited or deleted

### **Accelerate forms-based business processes**

- Review and approve submitted forms from a tablet or smartphone, web browser, or email.
- Show authorized staff all pending forms and actions required, increasing visibility and prompting timely response.
- Enable employees to create BPMN-compliant process models using drag-and-drop interaction.
- Modify existing processes and add users without the need to install additional business process automation software

### **Quickly diagram and implement workflows**

Build a business process automation solution for every need with our easy--to--use workflow designer.

- Use 150+ drag-and-drop activities to easily build custom workflows.
- Save hours of staff time with rule-based workflows for simple tasks like renaming documents and emailing document changes.
- Digitize entire processes like HR onboarding and accounts payable processing without writing code.

### **Gain insight from your content by integrating Line Of Business applications with Laserfiche**

- Integrate your content with ERP, CRM, SIS and GIS applications with one click using Laserfiche Connector.
- Browse hundreds of pre-built integrations to connect Laserfiche with core business applications.
- Use flexible SDKs to create sophisticated solutions that integrate with proprietary applications.

## Set up integrations in minutes

- Use Laserfiche Connector, a wizard-driven tool, to integrate line-of-business applications with Laserfiche without programming.
- Access and search documents, launch scanning, populate document metadata and perform other routine tasks directly within third-party systems.
- Integrate easily through user-defined hotkeys and embedded icons.
- Create searching and scanning profiles that end users can individually customize.
- Retrieve information from any integrated application or send it into Laserfiche with a single click.

Laserfiche provides Document Management, Business Process Management, Forms, Capture, Integrations, Security Records Management, ECM and Laserfiche Cloud. We would like to provide pertinent services for Mobile device functionality and Laserfiche web access light.

## Mobile device functionality

Laserfiche mobile platform provides the ability to extend collaborating, viewing, approving, and capture capabilities to the field. The mobile client combines the advanced image processing functionality of Laserfiche Photo Docs with a web-based version of our desktop client. With these tools, users can view, upload, and modify content on the go or from the comfort of home. Everything from workflow approvals to document creation and capture can be facilitated through our mobile client. Laserfiche Mobile comes with the system, can be accessed from any smartphone or tablet and is also available for free download from either the Android or Apple App Store. The application uses the phone's camera as a portable scanner. Images captured through the iPhone, iPad, Tablet or Android Device are not stored locally (for security purposes) and are uploaded through Laserfiche Web Access for processing. The Laserfiche Photo Docs technology de-warps the images, automatically crops the page and OCRs the documents so they're immediately available for full text searching. Laserfiche Mobile also provides the ability to index documents as they are captured or later; the mobile platform allows users to search, retrieve and view documents, as well as participate in business processes from anywhere at any time.

**Laserfiche Web Access Light**, designed for Blackberry, Chrome, Opera and Safari mobile browsers, offers a lightweight Web interface for popular mobile devices, enabling users to search and retrieve documents, as well as approve documents and participate in workflow automation processes, while away from their desktop computers.

Laserfiche Mobile™ for iOS and Android is a fully functional app that takes advantage of the multi-touch screen, remote printers and camera zoom features of the Apple iPhone, enabling users to:

- Create and upload new electronic documents.
- Automatically crop, straighten, and enhance captured information, with full text recognition.
- Copy, move, rename, download, e-mail, print or delete content.
- Browse for documents in a folder structure or search the entire repository.
- Participate in workflow automation processes by accessing metadata fields.
- Track and audit all mobile activities occurring in Laserfiche.

Laserfiche Mobile, which includes a built-in demonstration, is available for free download from the Apple App Store and Google Play. To accept connections from Laserfiche Mobile, Laserfiche Avante and Laserfiche Rio users with Web Access can download the free Laserfiche Mobile Add-On.

## **Benefits of GSG's Document and Record Management Solutions**

- ❖ GSG is a Laserfiche Gold and Platinum Certified Value-Added Reseller (VAR) with Experience and Certified Team Members.
- ❖ We provide Cost-Effective, Secure Implementation and a strong reputation for timely support.
- ❖ GSG has an excellent team expertise in services and solutions from the past 17 years needed for the fulfillment of the requirements. Our Team makes the business of government better through smart Management.
- ❖ Our Team includes a PMP certified Project Manager to direct effective use of timeline for implementation, project scheduling/tracking tools, status reports and resources to complete the project on time. We will never replace the project manager without a client's approval.
- ❖ Our CMS Software Suite facilitates an agile information governance strategy designed to reduce risk and mitigate the cost of growing volumes of content in the enterprise, allowing emphasis on utilizing information for growth and innovation.
- ❖ As our certified Key Personnel are working with federal and state government projects, they are familiar with obtaining CJIS clearance including fingerprinting before starting projects.
- ❖ To execute projects including implementation, configuration, data conversion, interfaces, migration, our project manager will closely work with client and understand the requirement and prepare each phase of project plan.
- ❖ We are experts at customizing and managing implementation in the optimal way for your organization.
- ❖ Our staff is highly qualified and experienced in Document Management System services. Using this expertise, we can start the work with little lead time based on County schedule
- ❖ GSG is providing professional services including Configuration, Administrative and Support Services and Training including End-User Training, System Administrator, and required documentation of project
- ❖ We are providing warranty and support including quick-response technical support, 24/7 online support, access to the latest hotfixes, updates and patches, access to new releases/upgrades, troubleshooting services performed during our normal business hours via Telephone, email or secure remote access, break/fix for all software or hardware provided, installed, or configured by GSG and under an active support agreement.
- ❖ We have the capacity, as well as personnel with similar experience and qualifications, to manage this contract expertly and effectively. We offer a balanced combination of experience and innovation.

## **Tab 9: Required Documents**

## 9. Tab 9: Required Documents

### 9.1. Federal Funds Certifications

#### FEDERAL FUNDS CERTIFICATIONS

Participating Agencies may elect to use federal funds to purchase under the Master Agreement. The following certifications and provisions may be required and apply when a Participating Agency expends federal funds for any purchase resulting from this procurement process. Pursuant to 2 C.F.R. § 200.326, all contracts, including small purchases, awarded by the Participating Agency and the Participating Agency's subcontractors shall contain the procurement provisions of Appendix II to Part 200, as applicable.

##### APPENDIX II TO 2 CFR PART 200

(A) Contracts for more than the simplified acquisition threshold currently set at \$250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

- Pursuant to Federal Rule (A) above, when a Participating Agency expends federal funds, the Participating Agency and Offeror reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

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

- Pursuant to Federal Rule (B) above, when a Participating Agency expends federal funds, the Participating Agency reserves the right to terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Offeror as detailed in the terms of the contract

(C) Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 CFR 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."

- Pursuant to Federal Rule (C) above, when a Participating Agency expends federal funds on any federally assisted construction contract, the equal opportunity clause is incorporated by reference herein.

(D) Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 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, contractors must be 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, contractors must be required to pay

wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 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 contractor 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. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

- Pursuant to Federal Rule (D) above, when a Participating Agency expends federal funds during the term of an award for all contracts and subgrants for construction or repair, offeror will be in compliance with all applicable Davis-Bacon Act provisions
- Any Participating Agency will include any current and applicable prevailing wage determination in each issued solicitation and provide Offeror with any required documentation and/or forms that must be completed by Offeror to remain in compliance the applicable Davis-Bacon Act provisions.

(E) Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 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 40 hours in the work week. The requirements of 40 U.S.C. 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.

- Pursuant to Federal Rule (E) above, when a Participating Agency expends federal funds, offeror certifies that offeror will be in compliance with all applicable provisions of the Contract Work Hours and Safety Standards Act during the term of an award for all contracts by Participating Agency resulting from this procurement process.

(F) Rights to Inventions Made Under a Contract or Agreement. If the 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 of 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.

- Pursuant to Federal Rule (F) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency resulting from this procurement process, the offeror agrees to comply with all applicable requirements as referenced in Federal Rule (F) above

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

- Pursuant to Federal Rule (G) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency member resulting from this procurement process, the offeror agrees to comply with all applicable requirements as referenced in Federal Rule (G) above

(H) Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

- Pursuant to Federal Rule (H) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term of an award for all contracts by Participating Agency resulting from this procurement process, the offeror certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency. If at any time during the term of an award the offeror or its principals becomes debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency, the offeror will notify the Participating Agency

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

- Pursuant to Federal Rule (I) above, when federal funds are expended by Participating Agency, the offeror certifies that during the term and after the awarded term of an award for all contracts by Participating Agency resulting from this procurement process, the

offeror certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). The undersigned further certifies that:

- o No Federal appropriated funds have been paid or will be paid for 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.
- o If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- o The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and all subrecipients shall certify and disclose accordingly.

#### **RECORD RETENTION REQUIREMENTS FOR CONTRACTS INVOLVING FEDERAL FUNDS**

When federal funds are expended by Participating Agency for any contract resulting from this procurement process, offeror certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.334. The offeror further certifies that offeror will retain all records as required by 2 CFR § 200.334 for a period of three years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

#### **CERTIFICATION OF COMPLIANCE WITH THE ENERGY POLICY AND CONSERVATION ACT**

When Participating Agency expends federal funds for any contract resulting from this procurement process, offeror certifies that it will comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq.; 49 C.F.R. Part 18).

#### **CERTIFICATION OF COMPLIANCE WITH BUY AMERICA PROVISIONS**

To the extent purchases are made with Federal Highway Administration, Federal Railroad Administration, or Federal Transit Administration funds, offeror certifies that its products comply with all applicable provisions of the Buy America Act and agrees to provide such certification or applicable waiver with respect to specific products to any Participating Agency upon request. Participating Agencies will clearly identify whether Buy America Provisions apply in any issued solicitation. Purchases made in accordance with the Buy America Act must still follow the applicable procurement rules calling for free and open competition.



**CERTIFICATION OF ACCESS TO RECORDS**

Offeror agrees that the Inspector General of the Agency or any of their duly authorized representatives shall have access to any non-financial documents, papers, or other records of offeror that are pertinent to offeror's discharge of its obligations under the Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to offeror's personnel for the purpose of interview and discussion relating to such documents. This right of access will last only as long as the records are retained.

**CERTIFICATION OF APPLICABILITY TO SUBCONTRACTORS**

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

A handwritten signature in blue ink, appearing to read "Lisa Salvada".

11/14/2022

**9.2. Clean Air and Water Act & Debarment Notice**

**CLEAN AIR AND WATER ACT AND DEBARMENT NOTICE**

By the signature below (Under Federal Required Signatures), I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

I hereby further certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension", as described in the Federal Register and Rules and Regulations.

A handwritten signature in blue ink, appearing to read "Lisa Salvador".

11/14/2022

9.3. *Contractors Requirements*

**ACKNOWLEDGMENT OF CONTRACTOR REQUIREMENTS**

National Cooperative Purchasing Alliance  
Organization

Name

Title

Address

Address

Signature

Date

Global Solutions Group, Inc.  
Vendor Name

Lisa Salvador  
Name

Vice President  
Title

25900 Greenfield Road, Suite 220  
Address

Oak Park, MI 48237  
Address

  
Signature

November 16, 2022  
Date

**9.4. Required Clauses for Federal Assistance by FTA**

**REQUIRED CLAUSES FOR FEDERAL ASSISTANCE  
 PROVIDED BY FTA**

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**ACCESS TO RECORDS AND REPORTS**

Contractor agrees to:

- a) Maintain all non-financial books, records, accounts and reports required under this Contract for a period of not less than two (2) years after the date of termination or expiration of this Contract or any extensions thereof except in the event of litigation or settlement of claims arising from the performance of this Contract, in which case Contractor agrees to maintain same until the FTA Administrator, the U.S. DOT Office of the Inspector General, the Comptroller General, or any of their duly authorized representatives, have disposed of all such litigation, appeals, claims or exceptions related thereto.
- b) Permit any of the foregoing parties to inspect all non-financial work, materials, and other data and records that pertain to the Project, and to audit the non-financial books, records, and accounts that pertain to the Project and to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed for the purpose of audit and examination. The right of access detailed in this section continues only as long as the records are retained.

*FTA does not require the inclusion of these requirements of Article 1.01 in subcontracts.*

**CIVIL RIGHTS / TITLE VI REQUIREMENTS**

- 1) Non-discrimination. In accordance with Title VI of the Civil Rights Act of 1964, as amended, 42 U.S.C. § 2000d, Section 303 of the Age Discrimination Act of 1975, as amended, 42 U.S.C. § 6102, Section 202 of the Americans with Disabilities Act of 1990, as amended, 42 U.S.C. § 12132, and Federal Transit Law at 49 U.S.C. § 5332, Contractor or subcontractor agrees that it will not discriminate against any employee or applicant for employment because of race, color, creed, national origin, sex, marital status age, or disability. In addition, Contractor agrees to comply with applicable Federal implementing regulations and other applicable implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.
- 2) Equal Employment Opportunity. The following Equal Employment Opportunity requirements apply to this Contract:
  - a. Race, Color, Creed, National Origin, Sex. In accordance with Title VII of the Civil Rights Act, as amended, 42 U.S.C. § 2000e, and Federal Transit Law at 49 U.S.C. § 5332, the Contractor agrees to comply with all applicable Equal Employment Opportunity requirements of U.S. Dept. of Labor regulations, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor, 41 CFR, Parts 60 *et seq.*", and with any applicable Federal statutes, executive orders, regulations, and Federal policies that may affect construction activities undertaken in the course of this Project. Contractor agrees

- to take affirmative action to ensure that applicants are employed, and that employees are treated during employment, without regard to their race, color, creed, national origin, sex, marital status, or age. 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. In addition, Contractor agrees to comply with any implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.
- b. Age. In accordance with the Age Discrimination in Employment Act (ADEA) of 1967, as amended, 29 U.S.C. Sections 621 through 634, and Equal Employment Opportunity Commission (EEOC) implementing regulations, "Age Discrimination in Employment Act", 29 CFR Part 1625, prohibit employment discrimination by Contractor against individuals on the basis of age, including present and prospective employees. In addition, Contractor agrees to comply with any implementing requirements FTA may issue that are flowed to Contractor from Awarding Participating Agency.
- c. Disabilities. In accordance with Section 102 of the Americans with Disabilities Act of 1990, as amended (ADA), 42 U.S.C. Sections 12101 *et seq.*, prohibits discrimination against qualified individuals with disabilities in programs, activities, and services, and imposes specific requirements on public and private entities. Contractor agrees that it will comply with the requirements of the Equal Employment Opportunity Commission (EEOC), "Regulations to Implement the Equal Employment Provisions of the Americans with Disabilities Act," 29 CFR, Part 1630, pertaining to employment of persons with disabilities and with their responsibilities under Titles I through V of the ADA in employment, public services, public accommodations, telecommunications, and other provisions.
- d. Segregated Facilities. Contractor certifies that their company does not and will not maintain or provide for their employees any segregated facilities at any of their establishments, and that they do not and will not permit their employees to perform their services at any location under the Contractor's control where segregated facilities are maintained. As used in this certification the term "segregated facilities" means any waiting rooms, work areas, restrooms and washrooms, restaurants and other eating areas, parking lots, drinking fountains, recreation or entertainment areas, transportation, and housing facilities provided for employees which are segregated by explicit directive or are in fact segregated on the basis of race, color, religion or national origin because of habit, local custom, or otherwise. Contractor agrees that a breach of this certification will be a violation of this Civil Rights clause.
- 3) Solicitations for Subcontracts, Including Procurements of Materials and Equipment. In all solicitations, either by competitive bidding or negotiation, made by Contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by Contractor of Contractor's obligations under this Contract and the regulations relative to non-discrimination on the grounds of race, color, creed, sex, disability, age or national origin.

- 4) Sanctions of Non-Compliance. In the event of Contractor's non-compliance with the non-discrimination provisions of this Contract, Public Agency shall impose such Contract sanctions as it or the FTA may determine to be appropriate, including, but not limited to: 1) Withholding of payments to Contractor under the Contract until Contractor complies, and/or; 2) Cancellation, termination or suspension of the Contract, in whole or in part.

*Contractor agrees to include the requirements of this clause in each subcontract financed in whole or in part with Federal assistance provided by FTA, modified only if necessary to identify the affected parties.*

#### **DISADVANTAGED BUSINESS PARTICIPATION**

This Contract is subject to the requirements of Title 49, Code of Federal Regulations, Part 26, "Participation by Disadvantaged Business Enterprises in Department of Transportation Financial Assistance Programs", therefore, it is the policy of the Department of Transportation (DOT) to ensure that Disadvantaged Business Enterprises (DBEs), as defined in 49 CFR Part 26, have an equal opportunity to receive and participate in the performance of DOT-assisted contracts.

- 1) Non-Discrimination Assurances. Contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Contract. Contractor shall carry out all applicable requirements of 49 CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by Contractor to carry out these requirements is a material breach of this Contract, which may result in the termination of this Contract or other such remedy as public agency deems appropriate. Each subcontract Contractor signs with a subcontractor must include the assurance in this paragraph. (See 49 CFR 26.13(b)).
- 2) Prompt Payment. Contractor is required to pay each subcontractor performing Work under this prime Contract for satisfactory performance of that work no later than thirty (30) days after Contractor's receipt of payment for that Work from public agency. In addition, Contractor is required to return any retainage payments to those subcontractors within thirty (30) days after the subcontractor's work related to this Contract is satisfactorily completed and any liens have been secured. Any delay or postponement of payment from the above time frames may occur only for good cause following written approval of public agency. This clause applies to both DBE and non-DBE subcontractors. Contractor must promptly notify public agency whenever a DBE subcontractor performing Work related to this Contract is terminated or fails to complete its Work, and must make good faith efforts to engage another DBE subcontractor to perform at least the same amount of work. Contractor may not terminate any DBE subcontractor and perform that Work through its own forces, or those of an affiliate, without prior written consent of public agency.
- 3) DBE Program. In connection with the performance of this Contract, Contractor will cooperate with public agency in meeting its commitments and goals to ensure that DBEs shall have the maximum practicable opportunity to compete for subcontract work, regardless of whether a contract goal is set for this Contract. Contractor agrees to use good faith efforts to carry out a policy in the award of its subcontracts, agent agreements, and procurement contracts which will, to the fullest extent, utilize DBEs consistent with the efficient performance of the Contract.

#### **ENERGY CONSERVATION REQUIREMENTS**

Contractor agrees to comply with mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plans issued under the Energy Policy and Conservation Act, as amended, 42 U.S.C. Sections 6321 *et seq.* and 41 CFR Part 301-10.

#### **FEDERAL CHANGES**

Contractor shall at all times comply with all applicable FTA regulations, policies, procedures and directives, listed directly or by reference in the Contract between Public Agency and the FTA, and those applicable regulatory and procedural updates that are communicated to Contractor by Public Agency, as they may be amended or promulgated from time to time during the term of this contract. Contractor's failure to so comply shall constitute a material breach of this Contract.

#### **INCORPORATION OF FEDERAL TRANSIT ADMINISTRATION (FTA) TERMS**

The provisions include, in part, certain Standard Terms and Conditions required by the U.S. Department of Transportation (DOT), whether or not expressly set forth in the preceding Contract provisions. All contractual provisions required by the DOT and applicable to the scope of a particular Contract awarded to Contractor by a Public Agency as a result of solicitation, as set forth in the most current FTA Circular 4220.1F, published February 8<sup>th</sup>, 2016, are hereby incorporated by reference. Anything to the contrary herein notwithstanding, all FTA mandated terms shall be deemed to control in the event of a conflict with other provisions contained in this Contract. Contractor agrees not to knowingly perform any act, knowingly fail to perform any act, or refuse to comply with any reasonable public agency requests that would directly cause public agency to be in violation of the FTA terms and conditions.

#### **NO FEDERAL GOVERNMENT OBLIGATIONS TO THIRD PARTIES**

Agency and Contractor acknowledge and agree that, absent the Federal Government's express written consent and notwithstanding any concurrence by the Federal Government in or approval of the solicitation or award of the underlying Contract, the Federal Government is not a party to this Contract and shall not be subject to any obligations or liabilities to agency, Contractor, or any other party (whether or not a party to that contract) pertaining to any matter resulting from the underlying Contract.

*Contractor agrees to include the above clause in each subcontract financed in whole or in part with federal assistance provided by the FTA. It is further agreed that the clause shall not be modified, except to identify the subcontractor who will be subject to its provisions.*

#### **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS**

Contractor acknowledges that the provisions of the Program Fraud Civil Remedies Act of 1986, as amended, 31 U.S.C. §§ 3801 *et seq.* and U.S. DOT regulations, "Program Fraud Civil Remedies," 49 CFR Part 31, apply to its actions pertaining to this Contract. Upon execution of the underlying Contract, Contractor certifies or affirms, to the best of its knowledge, the truthfulness and accuracy of any statement it has made, it makes, it may make, or causes to be

made, pertaining to the underlying Contract or the FTA assisted project for which this Contract Work is being performed.

In addition to other penalties that may be applicable, Contractor further acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification, the Federal Government reserves the right to impose the penalties of the Program Fraud Civil Remedies Act of 1986 on Contractor to the extent the Federal Government deems appropriate.

Contractor also acknowledges that if it makes, or causes to be made, a false, fictitious, or fraudulent claim, statement, submission, or certification to the Federal Government under a contract connected with a project that is financed in whole or in part with Federal assistance originally awarded by FTA under the authority of 49 U.S.C. § 5307, the Government reserves the right to impose the penalties of 18 U.S.C. § 1001 and 49 U.S.C. § 5307 (n)(1) on the Contractor, to the extent the Federal Government deems appropriate.

*Contractor agrees to include the above clauses in each subcontract financed in whole or in part with Federal assistance provided by FTA. It is further agreed that the clauses shall not be modified, except to identify the subcontractor who will be subject to the provisions.*



## 9.5. Federal Required Signatures

### **FEDERAL REQUIRED SIGNATURES**

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Offeror certifies compliance with all provisions, laws, acts, regulations, etc. as specifically noted in the pages above. It is further acknowledged that offeror agrees to comply with all federal, state, and local laws, rules, regulations and ordinances as applicable.

Offeror Global Solutions Group, Inc.

Address 25900 Greenfield Road, Suite 220

City/State/Zip Oak Park, MI 48237

Authorized Signature 

Date November 16, 2022

**9.6. Antitrust Certification Statements Texas Government Code § 2155.005**

**ANTITRUST CERTIFICATION STATEMENTS  
TEXAS GOVERNMENT CODE § 2155.005**

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

- (1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;
- (2) In connection with this bid, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;
- (3) In connection with this bid, neither I nor any representative of the Company has violated any federal antitrust law; and
- (4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this bid to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

Company Name Global Solutions Group, Inc.

Address 25900 Greenfield Road, Suite 220

City/State/Zip Oak Park, MI 48237


Telephone Number 248-291-5440

Fax Number None

Email Address lisas@globalsolgroup.com

Printed Name Lisa Salvador

Title Vice President

Authorized Signature 

**9.7. *State Notice Addendum***

GSG acknowledges that potential participants may include all county, city, special district, local government, school district, private K-12 school, higher education institution, state, tribal government, other government agency, healthcare organization, nonprofit organization and all other Public Agencies located nationally in all fifty states.

# GLOBAL

SOLUTIONS GROUP, INC.

**FORTINET**  
AUTHORIZED PARTNER

**ORACLE**  
PARTNER NETWORK

**MANDIANT**



**CISCO**  
Partner

**Microsoft**  
Gold Partner

**MICRO FOCUS**  
BUSINESS PARTNER

**Trellix**

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