



Response for

Region 4 Education Service Center
Software Solutions and Services, RFP
Solicitation Number 19-09
August 8, 2019 / 10:00AM CT

This proposal is valid for 120 days from date above.

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August 5, 2019

Crystal Wallace
Business Operations Specialist
Region 4 Education Service Center
7145 West Tidwell Road
Houston, TX 77092

Dear Crystal,

Thank you for considering Hyland Software, Inc. ("Hyland") and the Hyland solution for your project. We have thoroughly reviewed Region 4 Education Service Center's ("ESC") stated requirements, understand your needs and trust this will come through in our response. The solution proposed is well suited to meet your organization's goals for this project. Hyland commits to providing a complete, tailored and primarily point-and-click configurable solution. We are excited to share the features of our product with you.

The Hyland solution is **one platform with unlimited potential**. It is one of the most flexible and comprehensive software products on the market today. Hyland provides enterprise content management (ECM), case management, business process management (BPM), records management and capture, all on a single database, code base and content repository. This will be of particular benefit to ESC and participating members.

The Hyland solution is designed by people with proven industry expertise. It is tailored for departments and comprehensive for the enterprise – connecting with and complementing the other core line-of-business systems in use by participating members. Cloud-based file sharing or Enterprise File Sync and Share (EFSS) for the Hyland platform is available with our complementary offering, ShareBase.

Our response is based on the requirements provided in ESC's solicitation document. As your requirements evolve, we will provide additional information to your project team.

Thank you again for your interest in Hyland. Should questions arise during your review process, please contact me to discuss.

Sincerely,



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Noreen Kilbane
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TAB 1 – DRAFT CONTRACT AND OFFER AND CONTRACT SIGNATURE FORM

Hyland has chosen to provide exceptions on the General Terms and Conditions Acceptance Form provided on the following page. Therefore, Hyland has elected to provide the signed Vendor Contract Signature Form rather than providing the entire signed vendor contract, with the understanding that the proposed exceptions will be negotiated.

Note: Double-click the document icon below to open and view all pages. For hard copy full documents immediately follow.

OFFER AND CONTRACT SIGNATURE FORM (APPENDIX A)



Offer and Contract
Signature Form

a. Terms and Conditions Acceptance Form (Appendix B)

Note: Double-click the document icon below to open and view all pages. For hard copy full documents immediately follow.

APPENDIX B



Appendix B

TAB 2 – PRODUCTS/PRICING

i Offerors shall provide pricing based on a discount from a manufacturer’s price list or catalog, or fixed price, or a combination of both with indefinite quantities. Prices listed will be used to establish the extent of a manufacturer’s product lines, services, warranties, etc. that are available from Offeror and the pricing per item. Multiple percentage discounts are acceptable if, where different percentage discounts apply, they different percentages are specified. Additional pricing and/or discounts may be included. Products and services proposed are to be priced separately with all ineligible items identified. Offerors may elect to limit their proposals to any category or categories.

Hyland is providing pricing based on a discount from our manufacturer list price catalog, a verbatim extract of which is being provided with our RFP response. The pricelist being submitted for this Contract contains software, training, and services relative to various brands by Hyland.

ii Include an electronic copy of the catalog from which discount, or fixed price, is calculated. Electronic price lists must contain the following: (if applicable)

- Manufacturer part #**
- Offeror’s Part # (if different from manufacturer part #)**
- Description**
- Manufacturers Suggested List Price and Net Price**
- Net price to Region 4 ESC (including freight)**
- Media submitted for price list must include the Offerors’ company name, name of the solicitation, and date on a Flash Drive (i.e. Pin or Jump Drives).**

Hyland considers the requested information to be confidential and therefore it has been redacted.

iii Offer extensive robust line of top manufactures

Hyland is the manufacture of our software. We are offering a robust group of products that work together as a turnkey solution to our customer's unique document management needs. See our list of products below:

- OnBase
- Brainware
- Enterprise Search
- Perceptive Content
- ShareBase

Additionally, Hyland provides the following list of current partners who are authorized to market and sell Hyland solutions under our Contract. Hyland reserves the right to modify this list as needed during the duration of this opportunity, per the terms of the negotiated contract, Hyland will remain ESC and OMNIA's main point of contact, and will agree to accept all purchase orders, manage customer invoicing, provide sales reports, and manage payment of the Administrative Fee directly, according to the terms of the negotiates Contract.

Distributor/Dealer	Address	Website
Clear Data Solutions	3002 N Rocky Point Drive East, Ste 200 Tampa, FL 33607	www.cleardatait.com
Databank, IMX	12000 Baltimore Avenue Beltsville, Maryland 20705	http://www.databankimx.com
Hyland LLC	8900 Renner Blvd. Lenexa, KS 66219	http://www.hyland.com
Imagesoft, Inc.	25900 W. 11 Mile Rd. Suite 100 Southfield, Michigan 48034	http://www.imagesoftinc.com
Integrated Data Products, Inc.	1930 St. Andrews Ct. NE Cedar Rapids, IA 52402	http://www.idpcentral.com
Keymark, Inc.	105 Tech Lane Liberty, South Carolina 29657	http://www.keymarkinc.com
NEKO Industries	3017 Douglas Blvd, Suite 300 Roseville, California 95661	http://www.nekoind.com
Northwoods Consulting Partners, Inc.	5815 Wall St. Dublin, Ohio 43017	http://www.teamnorthwoods.com
Prime AE Group, Inc.	55 Capital Blvd Rocky Hill, Ct, Connecticut 06067	http://www.3sq.com
Results Engineering	130 Wetherby Lane Westerville, Ohio 43081	http://kmbs.konicaminolta.us
Sharp Business Systems	8670 Argent Street Santee, CA 92071	www.sharp-world.com
Xerox Corporation	45 Glover Ave PO Box 4505 Norwalk, Connecticut 06856-4505	www.xerox.com

iv Is pricing available for all products and services?

A line item pricelist specific to this Contract has been provided in the Pricing section above, question [ii](#) on page 3. Any item on this list that has custom pricing has been called out specifically; all other items have a distinguished price.

v Describe any shipping charges.

N/A

vi Provide pricing for warranties on all products and services.

Hyland provides a warranty which is included with the purchase of software. The terms of our warranty are included in the applicable Master Software License, Services, and Support Agreements.

vii Describe any return and restocking fees.

N/A

viii Describe any additional discounts or rebates available. Additional discounts or rebates may be offered for large quantity orders, single ship to location, growth, annual spend, guaranteed quantity, etc.

N/A

ix Describe how customers verify they are receiving Contract pricing.

Customers may verify contract pricing by checking the public pricelist available online after award on Hyland's Contract landing page on the OMNIA website. In addition, customers may reach out to their assigned Hyland Account Manager for more information on pricing, or may contact the Government Contracts team directly at governmentcontracts@hyland.com with pricing verification questions.

x Describe payment methods offered.

Hyland delivers invoices electronically via email with invoices as PDF attachments. Invoices are delivered to the address instructed by the customer. Payments can be submitted via check, ACH, wire transfer or credit card.

xi Propose the frequency of updates to the Offeror's pricing structure. Describe any proposed indices to guide price adjustments. If offering a catalog contract with discounts by category, while changes in individual pricing may change, the category discounts should not change over the term of the Contract.

Changes are made to Hyland's commercial fee schedule (internal pricelist) on a monthly basis. At least twice per year, Hyland releases new versions of our software products. Each release also initiates a change in the fee schedule to add new products and features and remove items that are no longer sold. Hyland will seek to update the OMNIA Contract pricing in accordance with changes made to our fee schedule in order to offer OMNIA participating agencies Hyland's most current products and services. Hyland will not request to update the Contract pricelist more frequently than once per month. Hyland's Contract pricing is calculated based on the established commercial fee schedule, and discounts are given at the category level, with a few specific exceptions that have been noted in the Contract pricelist. Hyland understands that category discounts should not change over the term of the Contract.

xii Describe how future product introductions will be priced and align with Contract pricing proposed.

Future product additions to the Contract will be priced according to Hyland's commercial fee schedule rates, and category discounts outlined in the Contract pricelist where similar items already exist on the pricelist. In the event a new category of products is introduced, Hyland will consider the commercial fee schedule rates as well as any associated costs incurred by Hyland to support the products, and provide a proposed Contract discount structure accordingly. Whenever possible, Hyland will align the discount procedures for new product categories with categories already on the Contract pricelist.

xiii Provide any additional information relevant to this section.

Hyland is providing pricing for multiple owned product lines, document management functionalities, and software deployment methods.

Not to Exceed Pricing. Region 4 ESC requests pricing be submitted as not to exceed pricing. Unlike fixed pricing, the Contractor can adjust submitted pricing lower if needed but, cannot exceed original pricing submitted. Contractor must allow for lower pricing to be available for similar product and service purchases. Cost plus pricing as a primary pricing structure is not acceptable.

It appears that the Not to Exceed Pricing language and Appendix A, Term 17 are in conflict. Hyland is open to discussion regarding these two sections.

TAB 3 – PERFORMANCE CAPABILITY

i Include a detailed response to Appendix D, Exhibit A, OMNIA Partners Response for National Cooperative Contract. Responses should highlight experience, demonstrate a strong national presence, describe how Offeror will educate its national sales force about the Contract, describe how products and services will be distributed nationwide, include a plan for marketing the products and services nationwide, and describe how volume will be tracked and reported to OMNIA Partners.

Company

A. Brief history and description of Supplier.

Hyland is a leader in providing software solutions for managing content, processes and cases for organizations across the globe. For 25+ years, Hyland has enabled customers to digitalize their workplaces and fundamentally transform their operations.

We thrive on new ideas and diverse perspectives. Our mission is to help our employees, customers and partners achieve their full potential. We believe Hylanders can accomplish anything when they have the freedom to innovate, be creative and embrace the future. That, and an intense dedication to our core values, is what our award-winning software is built on.

Our customers continue to see the ongoing value of partnering with us. Hyland is a high-value, low-risk company built on stability and focus, as evidenced by our industry leading customer retention rates and year-after-year double-digit growth. Named one of Fortune's Best Companies to Work For® since 2014, Hyland is widely known as both a great company to work for and a great company to do business with.

Additional facts:

- More than 3,300 employees worldwide
- Industry leading customer retention rates
- 15% of revenue is reinvested in ongoing product research and development
- 20% compound annual revenue growth rate since 2007
- Sold direct and through channel – VARs, OEMs and system integrators
- Built and delivered by industry experts in Healthcare, Government, Financial Services, Insurance, Commercial and Higher Education
- Partners with Microsoft®, HP®, Oracle®, SAP®, Infor®, Esri®, Workday®, Konica Minolta, Xerox and CITRIX®

B. Total number and location of sales persons employed by Supplier.

Hyland has more than 3,300 employees globally (does not include interns or temporary employees). Departmental breakdown is as follows (percentages are rounded)

- Human Resources – 75
- Information Systems – 115
- Operations – 139
- Development / R&D – 1,088
- Hyland Global Services – 649
- Technical Support/Global Cloud Services – 517
- Other (Diner, CEC, Facilities) – 92
- Sales & Marketing – 657
 - Channel/Commercial Sales – 58
 - Financial Services Sales - 22
 - Government Sales - 27
 - Healthcare Sales - 130
 - Higher Ed Sales - 27
 - Insurance Sales - 25
 - International Sales – 103

C. Number and location of support centers (if applicable) and location of corporate office.

Hyland has Technical Support professionals located across the globe to ensure time zone coverage, with support centers in the following cities:

United States

- Westlake, Ohio
- Olathe, Kansas
- Lincoln, Nebraska
- Bloomington, Minnesota
- Pleasanton, California
- Irvine, California
- Phoenix, Arizona
- Alpharetta, Georgia
- Salt Lake City, Utah
- Tampa, Florida
- Monroe, North Carolina

International

- London, United Kingdom
- Nottingham, United Kingdom
- Amersfoort, Netherlands
- Berlin, Germany
- Sao Paulo, Brazil
- Tokyo, Japan
- Melbourne, Australia

Hyland's headquarters are located in Westlake, Ohio. We have 30 office locations and dozens of remote Hylanders around the world in 22 countries.

U.S. offices:

- Alpharetta, GA
- Andover, MA
- Auburn, CA
- Bloomington, MN
- Greenwood Village, CO
- Irvine, CA
- Lansing, MI
- Lincoln, NE
- Olathe, KS
- Phoenix, AZ
- Pleasanton, CA
- Salt Lake City, UT
- Tampa, FL
- Westlake, OH (corporate headquarters)

Global offices:

- Melbourne, Australia
- Sydney, Australia
- Jundiai, Brazil
- Sao Paulo, Brazil
- Toronto, Canada
- Santiago, Chile
- Berlin, Germany
- Freiburg, Germany
- Kolkata, India
- Lima, Peru
- Tokyo, Japan
- Amersfoort, Netherlands
- Cham, Switzerland
- Neuchâtel (Corcelles), Switzerland
- London, United Kingdom
- Nottingham, United Kingdom

D. Annual sales for the three previous fiscal years.

Fiscal Year	Annual Sales (US Dollar Amounts in Thousands)
2016	\$430,131
2017	\$518,301
2018	\$696,311

E. Submit FEIN and Dunn & Bradstreet report.

Hyland Software's Federal Tax ID# is 34-1699247

Hyland Software's Dun & Bradstreet# is 787515550

F. Describe any green or environmental initiatives or policies.

Hyland is dedicated to helping our community, and with this dedication, Hyland recognizes that it has a responsibility to the environment beyond legal and regulatory requirements. We are committed to reducing our environmental impact and continually improving our environmental performance as an integral part of our business strategy and operating methods.

Whether it's how we build our facilities or dispose of waste, or through the vendors we use, Hyland supports practices that intelligently recycle and reuse materials.

Preserving resources and logically reducing waste is critical in all parts of our community, and Hyland is proud to support initiatives that contribute to a clean environment.

Hyland endeavors to:

- Comply with or exceed all relevant regulatory requirements.
- Continually improve and monitor environmental performance.
- Continually improve and reduce environmental impact.
- Incorporate environmental factors into business decisions when appropriate.
- Increase employee awareness with respect to environmental responsibility.

Paper

- We will minimize the use of paper in the office.
- We will reduce and recycle packaging when appropriate.
- We will buy recycled and recyclable paper products when possible.
- We will reuse and recycle paper products.
- We instituted reusable cups and mugs in all offices, disposable cups are available for visitors only.

Energy & Water

- We will seek to reduce the amount of energy used by Hyland.
- Lights and electrical equipment will be switched off when not in use.
- Heating will be adjusted with energy consumption in mind.
- The energy consumption and efficiency of new products will be taken into account when purchasing.

Office Supplies

- We will seek to buy from environmentally friendly vendors.
- We will evaluate and monitor how to better reuse and recycle office supplies.

Transportation

- We will promote the use of travel alternatives, such as email and video/phone conferencing.
- We will make additional efforts to accommodate the needs of those using public transportation or bicycles.

Maintenance and Cleaning

- Cleaning materials will be as environmentally friendly as possible.
- We will seek to reuse materials when completing an office refurbishment.
- We will only use licensed and appropriate organizations to dispose of waste.

Monitoring, Improvement, and Culture

- We will publish internal posts containing sustainable living suggestions.
- We will make continuous efforts to evaluate practices and identify potential improvements.
- We will update this policy in consultation with Hyland staff as appropriate.

G. Describe any diversity programs or partners supplier does business with and how Participating Agencies may use diverse partners through the Master Agreement. Indicate how, if at all, pricing changes when using the diversity program.

Hyland engages in the following initiatives to increase business with diverse suppliers:

Hyland's Supplier Diversity Mission Statement - The Sourcing department realizes the value and long-lasting supplier relationship that is gained by utilizing Small Businesses. We have created the following diversity statement, which is also included as part of Hyland's Supply Chain Transparency on www.hyland.com.

Hyland Sourcing Department Diversity Statement - Hyland's Sourcing Department actively seeks out, develops and attempts to build significant vendor relationships with Small Disadvantaged Businesses, Women-Owned Small Businesses, Veteran-Owned Small Businesses, including Service-Disabled Veteran-Owned Small Businesses and HUB-Zone Small Businesses, to ensure full and equitable opportunities when procuring goods and services.

Supplier Diversity Program - We have centralized our purchasing at Hyland in order to create a more streamlined approach to purchasing which allows the Sourcing department to oversee our goals when it comes to Small Business spend. Sourcing has a Vendor Management system that allows us to indicate who our Small Businesses are and their Small Business type. We then track our spend by running monthly reports based on these vendors that are marked as Small Business. Sourcing attends at least two Small Business networking events each year in order to meet Small Businesses and learn how their capabilities will meet our purchasing needs. Sourcing also maintains contact with many Small Businesses throughout the year to proactively determine if there is an area where they can meet our purchasing needs.

Marketing/advertising business opportunities to diversity vendors - Sourcing attends Small Business networking events to meet Small Businesses each year. We also have developed a Vendor Portal (vendors.hyland.com) where any Small Business can register and let Hyland know the goods/services they can supply. When it comes time for Sourcing to send out RFPs, we gather our list by looking at our Vendor Management System to ensure we are including diverse suppliers.

Human Rights - Hyland Sourcing will actively seek out and attempt to build vendor relationships with businesses committed to upholding fundamental human rights and believe that all human beings around the world should be treated with dignity, fairness, and respect. We will only engage vendors who demonstrate a serious commitment to the health and safety of their workers and operate in compliance with human rights laws.

Hyland is committed to creating an inclusive environment for every person. We have programs and partnerships that integrate diversity and inclusion into many aspects of the business, product innovation and recruitment.

H. Describe any historically underutilized business certifications supplier holds and the certifying agency. This may include business enterprises such as minority and women owned, small or disadvantaged, disable veterans, etc.

Hyland is a large business and as such, does not qualify for any small business certifications.

I. Describe how supplier differentiates itself from its competitors.

Every vendor has strengths and weaknesses compared to the competition. Hyland differentiates ourselves from our common competitors in three distinct areas: Product, Expertise, and Support.

Hyland is a proven, leading content services platform that can deliver a lower total cost of ownership (TCO) because of our passionate commitment to configurable solutions rather than customizable solutions (i.e., custom code). This approach has been validated by both our customers and industry analysts like Gartner and Forrester. For solutions involving content management, case management, process automation, archiving, records management and forms, the Hyland solution has proven to be easier to administer, easier to maintain, and faster to deploy than other comparable suites in the market today. Lower TCO means lower software-to-service ratios on content management projects, and it means less effort, training, and resources required.

As a fully comprehensive content services platform, the core of our strategy serves as:

- A central, enabling infrastructure that integrates with core enterprise applications and augments them with configurable content, process and case management functionality.
- A reusable framework to build low-code, content-enabled applications that can do a better job than “point” and “shadow IT” solutions in filling information management gaps that exist between core enterprise applications.

Hyland is scalable. It can easily scale upwards and downwards in scope, performance, and sophistication. Few, if any, other ECM vendors can use the same suite to compete for business in small organizations like credit unions or small community colleges as well as geographically distributed and multinational deployments in healthcare and higher education.

Hyland is configurable with minimal need for scripting: Competitive solutions can deliver much of the same functionality of Hyland, but only with the use of scripting on their forms or in their workflow processes. Hyland does not require knowledge of scripting and will not itemize out specific charges for scripting because the same functionality is likely a configurable option in Hyland.

Integrated Case Management capabilities. Case management functionality is integrated within the full Hyland platform. We provide a low-code platform that equips organizations to rapidly configure content-enabled case and other applications. We also have a growing offering of packaged and point applications, including public record request management, contract management and incident case management.

Mobile Device Access: Competitive solutions are browser-based, not optimized using the native features of the device's operating system, such as the ability to pinch zoom, slide, upload from the device, etc.

Integration with Outlook: For so many customers, the true system in which users do the majority of their work is Outlook. Forcing users to leave this interface is not the best way to drive user adoption. Hyland fully immerses the Hyland experience into Outlook, allowing users to easily import emails, act on workflows, and search and retrieve documents from the familiar Outlook interface. Other solutions will have integration points that link to the external imaging application.

Deep Expertise in Content Services and Industry-Specific Solutions. Hyland is a leader in content management according to the 2018 Gartner Magic Quadrant for Content Services Platforms, and building content enabled solutions is our sole focus as a company. We are also a very stable organization. Since 1991, financial analysts have consistently viewed Hyland as a growth organization, a designation usually only placed on new companies in their infancy. Our compound annual revenue growth rate has been 20% since 2007.

Hyland has a focus on strong horizontal- and industry-specific content solutions. We have been recognized by the analyst community for our deep expertise in healthcare, higher education, insurance, government and financial services.

Customer Support. Hyland has a dedicated 24/7 Technical Support department that is focused on compressing the time frame from issue inception to resolution while providing a remarkable support service experience. None of our support is outsourced, and each technical support representative goes through the same Hyland training as developers, quality assurance representatives, installers, and consultants.

J. Describe any present or past litigation, bankruptcy or reorganization involving supplier.

Although Hyland has been involved in litigation, no litigation exists that would impact Hyland's ability to provide the products or services proposed in Hyland's RFP response.

Hyland has not declared bankruptcy or reorganized in the past and is not currently involved in either activity.

K. Felony Conviction Notice: Indicate if the supplier

- i is a publicly held corporation and this reporting requirement is not applicable;
- ii is not owned or operated by anyone who has been convicted of a felony; or
- iii is owned or operated by and individual(s) who has been convicted of a felony and provide the names and convictions.

Hyland Software, Inc. is not owned or operated by anyone who has been convicted of a felony.

L. Describe any debarment or suspension actions taken against supplier

None.

Distribution, Logistics

A. Describe the full line of products and services offered by supplier.

Hyland is a single enterprise information platform for managing content, processes and cases. Hyland has transformed thousands of organizations worldwide by empowering them to become more agile, efficient and effective.

Hyland provides enterprise content management (ECM), case management, business process management (BPM), records management and capture all on a single database, code base and content repository. Cloud-based file sharing, also called Enterprise file sync and share (EFSS) for the Hyland platform is available with our complementary offering, ShareBase.

Hyland meets your IT needs, long into the future because it is:

- *Configurable without code* – Hyland is point-and-click configurable, allowing you to use checkboxes, radio buttons and drop-down menus to quickly configure and easily change solutions. That means no expensive, time-consuming and difficult-to-maintain coding or scripting.
- *Scalable across your organization* – Hyland scales as requirements evolve, so you will never outgrow your Hyland system. Start in one department and grow your solution over time as needs and requirements change. Maintain speed and performance, even as you continue to expand and enhance your solution.
- *Easily upgradable* - With Hyland, all your solution components are upgraded together, eliminating the challenges of upgrading multiple custom-coded or point solutions. Take advantage of incremental parallel upgrades, minimizing downtime by allowing more than one Hyland version to run simultaneously.

Please see the following pages which speak to Hyland products and services.

Hyland overview

Capture: Regardless of format or location, our content services solution allows users to capture documents and the critical information they hold right at the source. It then organizes them into a single system with minimal human interaction – removing tedious and error-prone manual data entry.

Whether paper or electronic, our solution captures almost any file type and quickly extracts necessary information, automatically sending it to all relevant systems.

- *Scan paper documents:* Capture a single page or thousands of documents directly from where you receive them, saving time and minimizing costs associated with transportation.
- *Import electronic documents and information:* Automatically capture electronic documents in their native format, directly from the applications you use on a daily basis. From CAD files to email messages to PDFs, our solution ingests any file format. You can even use your mobile device to quickly upload photos and content while in the field, whether you are connected or offline.
- *Extract data from your documents:* While capturing documents, our solution pulls the relevant data off the page, validates it against existing information and shares it with your other systems – saving time associated with manual data entry. The extracted data is then used to automatically index documents into the system, making them instantly accessible.

Manage: Our content services solution combines the ability to manage processes, documents and data in one system so customers' information flows seamlessly throughout their organization. This allows customers the ability to minimize process delays, data silos and disconnected documents and automate repetitive tasks while equipping workers to make better decisions.

Customers can build content-enabled applications, without custom coding, that support their requirements today and grow with them.

- *Manage documents:* Work electronically with all critical content, regardless of format. Empower users to easily search for documents while leveraging digital folders and file cabinets to keep content organized. Effectively handle revisions and versions, electronically sign and automatically generate documents for distribution to customers and constituents.
- *Manage processes:* Decrease processing time and increase employee productivity by optimizing your processes. Our solution automates predictable tasks while delivering exceptions and decisions to the right people, at the right time. Leverage our solution to send notifications, enable approvals from mobile devices and load balance important work – increasing efficiency and keeping processes flowing.
- *Manage data:* Create data-centric and case management applications with our solution, replacing antiquated databases, shared spreadsheets and legacy systems. Minimize the need for custom-developed or off-the-shelf solutions for areas such as HR onboarding, vendor management and fraud investigation. Provide users with access to all data, documents, tasks and conversations that support a customer, case or project – from one interface.

Access: With our content services solution, customers can access their content easily, from anywhere. Hyland's solution allows your information finds you and becomes instantly available to the people who need it, wherever they are, from almost any device or application. Empower your users to access content the way that makes the most sense for them – allowing them to work more effectively from the office, on the road or in the field.

By providing the right information at the right time, our content services solution equips your users to make better decisions, effectively serve customers and keep processes flowing.

With our solution, provide access to information:

- *From a personalized, intuitive user interface:* Put the documents, forms, business processes and reports that are important right at users' fingertips.
- *While working in another business application:* Hyland integrates with other applications, such as your ERP system or Microsoft® Office products, equipping users to access content directly from their familiar screens.
- *While on the go:* Use Hyland mobile applications to instantly access your information, make decisions and monitor processes wherever you are – from an iPhone, iPad, Android or Windows phone or tablet.
- *When disconnected:* Give field workers the ability to retrieve, create and update documents, complete forms and upload photos while offline.
- *To those outside your organization:* Improve the experience of your customers, patients, constituents and students by allowing them to easily submit forms, track process status and access documents online.

Integrate: Integrate our solution with your other applications.

Hyland's content services solution provides a variety of integration methods to equip users with instant access to all the information they need from their preferred application.

Leverage information from another application to automatically launch processes in the system- such as composing documents, filling out forms or triggering business workflows. That way, users make critical business decisions faster and with the most accurate information.

Our solution integrates with your key applications via a variety of integration options:

- *Purpose-built integrations:* Purpose-built integrations for many widely adopted applications, including PeopleSoft®, SAP®, Microsoft Office®, Outlook®, ESRI®, Datatel® and Infor Lawson®. These specific integrations seamlessly feed information and documents between Hyland and the other applications.
- *Screen-level integrations:* With a point-and-click configuration tool, our solution empowers your users to access documents, create forms and even begin solution processes directly from the screens of other business applications.
- *Data-level integrations:* Our solution offers its Enterprise Integration Server to coordinate an instantaneous, guaranteed exchange of data between your applications. By integrating your applications at the data-level, you ensure that the data across all your systems is consistent and up-to-date.

Measure: Monitor your process and system performance.

Our content services solution provides real-time insights into the status of your processes, the completeness of your records and the health of your system – allowing you to take action when and where it's needed. The system also facilitates audits and supports compliance initiatives by identifying the existence and accuracy of information.

With your solution, you gain visibility into key content and processes:

- *Monitor:* Our solution provides immediate, actionable information about the status of business processes. With interactive reporting dashboards – available via web browser, Microsoft® SharePoint and mobile devices – managers and process owners proactively monitor processes and determine areas for improvement.
- *Audit:* Easily view what's in the system, as well as what's missing, aging or expired. Our content services solution also facilitates easier external audits by equipping auditors with access to content through a convenient web portal.
- *Report:* With comprehensive reporting capabilities, you have visibility into process status, outcomes and the health of the Hyland system. End users run the reports they need with an intuitive interface and without burdening IT or compromising system security.

Store: Our content services solution minimizes risk and supports compliance by securely storing, protecting and destroying your information in accordance with applicable regulations – without needing to purchase additional third-party software or hardware.

By consolidating all of your important content into one system, our solution solves the problems associated with managing content across a variety of databases, systems and physical storage locations.

- *Secure:* Via powerful encryption, Hyland secures your important data when it's at rest, in motion and being accessed – supporting standards like PCI and DSS compliance. By working with your existing NT or LDAP authentication protocols, our content services solution simplifies administration of your security policies while providing granular control over exactly who can access information and what they can do with it.
- *Protect:* Our solution protects your information by creating multiple electronic copies of each document on servers across different locations. Should the main file server become inoperable, the system automatically switches over to the next server in line, allowing continuous access. Our Cloud users benefit from having up to three duplicate copies of data in datacenters across multiple geographical locations for maximum business continuity.
- *Destroy:* Our solution simplifies the implementation of retention plans and policies. When content is ready for disposition, the system sends it for review or automatically destroys it according to your requirements.

Hyland Global Services

The Hyland Global Services organization provides a broad range of services; from strategic planning and needs assessment, to solution deployment and training on a global basis. The underlying philosophy of Hyland Global Services is to empower customers to operate, maintain, modify, and extend their Hyland solutions—maximizing the value of their ECM investment and minimizing their total cost of ownership over time. Hyland Global Services team members are employed to develop customer competence with the technology and confidence in the potential solution sets they can develop using Hyland ECM technology. We use a mentoring approach that builds partnerships, not merely attains customers.

Our intent is to empower our customers because it's the right thing to do. To that end, in our experience, end users want a services relationship built on partnership, not dependency. Our experts lead them in successful projects, which builds confidence and increases their self-sufficiency for future projects and growth. Our services are designed to be highly collaborative. We also share information including providing documentation detailing the project, the personnel involved and often recommendations for next steps.

Hyland Global Services offers the following:

Implementation Services: Rely on experienced solution implementation specialists to ensure your configuration, implementation and testing stays on time and within budget to maximize the investment in your Hyland solution.

Custom Integrations: Our API and integration experts design applications and scripts extending Hyland document availability to other systems, including SAP, Infor Lawson, PeopleSoft, Ellucian, Workday, Salesforce, and to kiosks, web portals and WorkView Case Manager.

Upgrade Services: Collaborate with our experts for upgrade assistance or guidance, especially when Hyland is multiple versions behind, the upgrade has high visibility or tight deadlines, or involves multiple technologies, integrations or custom solutions.

Conversion Services: Work collaboratively with our certified, experienced conversion experts to bring your legacy documents and data into your new or existing Hyland solution.

Database Platform Migration: Whether upgrading to a new version of an existing database, or migrating to a new platform, our Oracle and Microsoft certified database engineers partner with you, ensuring a seamless transition.

Imaging Services: Secure document scanning, indexing and physical document storage/retention services for when you need help with a single backfile conversion, day-forward scanning, or until in-house resources are ready.

Education: Hyland education programs reflect a mentorship approach to customer technical and solution training. Hyland executes an industry-recognized, certification program supporting the career and professional development of both business and IT professionals.

On Demand Services: Engage On-Demand Services for rapid response to questions and guidance on the wide range of areas you maintain in your Hyland solutions. This partnership provides assurance you're receiving the most qualified help to carry on your initiatives and address any challenges you encounter.

Business Process Outsourcing: Outsource scanning and indexing of high document volume areas of your organization, enabling rapid accessibility of documents—whether from the Hyland Cloud or your enterprise systems—utilizing our automated workflow and integration capabilities.

Outsourced System Administration: Fill temporary gaps with a certified Hyland expert (on-site or remote) when your SA is new to the role, goes on leave, or role changes or expansion projects require support for day-to-day admin tasks.

Staff Augmentation: Our certified experts join your team for a project you've defined—including Workflow, WorkView and advanced capture projects—but don't have resources in-house to execute in required timeframes.

Enterprise Planning: We work with you to identify and roadmap how to maximize your Hyland investment, and ensure your solutions continue to meet evolving enterprise goals—including improved service, ROI and risk mitigation.

Infrastructure Planning: Expert analysis and guidance ensure optimal performance of your Hyland solutions, equipping you to maintain high-performing solutions despite changing workloads, requirements and SLAs.

Program Management: Perpetual support for multiple enterprise-wide projects promotes a close understanding of your users, systems and ongoing success criteria, ensuring alignment with executive vision and continued project success.

Consulting Services: In all we do, Hyland Global Services professionals strive to be your trusted advisors and enterprise technology consultants. Our Global Services customers find their solutions are built to evolve with their business. They consistently earn quantifiable ROI, both immediate and over time.

Change Management: Having a structured approach to manage change is proven to significantly increase overall project success and user adoption rates. Ours is built on a four tier framework, scalable based on your needs.

Project Management: Leverage our experienced and certified project managers to ensure your project stays on track, on time and within budget, while providing a single-point-of-contact for your organization.

Contract Management: The Contract Management Point Application provides organizations with a powerful, purpose-built solution that is both rapid to deploy and easy to setup. It simply lets customers get to the starting line right away with the pre-configured installation.

B. Describe how supplier proposes to distribute the products/service nationwide. Include any states where products and services will not be offered under the Master Agreement, including U.S. Territories and Outlying Areas.

Hyland agrees to offer products and services domestically across the United States. Due to the nature of the software offerings, no additional costs will be incurred by the supplier or customers in delivery of software components. Maintenance and support services are provided remotely via phone and web. Any related services required by the customer may be performed remotely or onsite. When Hyland professional services are deployed onsite, travel and expenses will be billed to the customer in accordance with Hyland’s internal travel and expense policy, or as negotiated at the task order level.

C. Identify all other companies that will be involved in processing, handling or shipping the products/service to the end user.

These activities are conducted at our U.S. Headquarters.

D. Provide the number, size and location of Supplier’s distribution facilities, warehouses and retail network as applicable.

Hyland products are hardware-independent, allowing your organization to leverage existing hardware or procure any hardware that can support the platforms upon which the solution can reside. For this we do not have distribution facilities or warehouses. Please see question [C](#) on page 8 under [Tab 3 – Performance Capability](#) for a list of our locations.

Marketing and Sales

- A. Provide a detailed ninety-day plan beginning from award date of the Master Agreement describing the strategy to immediately implement the Master Agreement as supplier's primary go to market strategy for Public Agencies to supplier's teams nationwide, to include, but not limited to:**
- i Executive leadership endorsement and sponsorship of the award as the public sector go-to-market strategy within first 10 days**
 - ii Training and education of Supplier's national sales force with participation from the Supplier's executive leadership, along with the OMNIA Partners team within first 90 days**

As Hyland currently holds the Software Solutions and Services contract with OMNIA Partners, we have already positioned this contract as a valuable tool that eligible customers can take advantage of. We will continue the existing marketing and sales outreach strategies to keep building interest in and use of the Contract. For a large organization like Hyland, the 10 and 90 day timeline expectations are unrealistic. Hyland will put forth a good faith effort to implement the plans below within a realistic timeframe for our organization and commits to continuing to partner with OMNIA Partners to ensure the success of a new Master Agreement.

Hyland markets and sells our products and services primarily through our reseller partner channel and directly from our Sales team here at Hyland. Procurement marketing strategies use a mix of best practices that stress face-to-face marketing and thought leadership, web presence, online communities, email campaigns and social media, to reach potential customers and educate them about the value of our products and solutions. The following represents various marketing and sales steps Hyland will take after award of the Contract, which have proven very successful with the current OMNIA Partners contract that Hyland holds:

Press Releases – Upon award, and with the collaboration of ESC and OMNIA, Hyland will create and distribute press releases to appropriate media outlets about selection for participation in the Contract. We will also publish this release to the News section of the Hyland website.

Websites – Hyland will create a landing page within our own website as a resource for customers who wish to use the awarded Contract. The webpage will consist of pricing and contact information, order process information, and a link to the OMNIA site landing page.

Video – Hyland will create informational videos and instructional webinar recordings as a way to communicate the value of the Hyland products and services, and to demonstrate solutions. Marketing videos will present Contract information and will direct potential customers to the Hyland landing page and OMNIA website for purchase procedures and other information.

Organization Participation – As a part of our marketing strategy, Hyland participates in many governmental and public procurement associations at all levels. Customers can use these platforms as a way to learn more about Hyland's offerings and procurement options.

Social Media – Hyland makes use of Twitter, Facebook, the corporate blogs and online communities to publish content, take thought leadership positions and pursue marketing strategies.

Sales – Information regarding this specific Contract will be added to existing sales playbooks. An announcement of the award will be made in the monthly sales and management meetings, as well as communicated via email to our sales organization through executive leadership's quarterly sales update email. Additionally, a separate email communication will be released directly to the government, higher education, and public sales branches within Hyland.

Furthermore, Hyland will work with OMNIA to implement joint education initiatives with Hyland's national public sales teams. Hyland's partner network will be notified via an announcement email as well as a post on our blog in the Hyland partner Community online. Partner training webinars will also be held to ensure the sales and partner network understands the terms and usage requirements under the Contract.

- B. Provide a detailed ninety-day plan beginning from award date of the Master Agreement describing the strategy to market the Master Agreement to current Participating Public Agencies, existing Public Agency customers of Supplier, as well as to prospective Public Agencies nationwide immediately upon award, to include, but not limited to:**
- i Creation and distribution of a co-branded press release to trade publications**
 - ii Announcement, contract details and contact information published on the Supplier's website within first 90 days**
 - iii Design, publication and distribution of co-branded marketing materials within first 90 days**
 - iv Commitment to attendance and participation with OMNIA Partners at national (i.e. NIGP Annual Forum, NPI Conference, etc.), regional (i.e. Regional NIGP Chapter Meetings, Regional Cooperative Summits, etc.) and supplier-specific trade shows, conferences and meetings throughout the term of the Master Agreement**
 - v Commitment to attend, exhibit and participate at the NIGP Annual Forum in an area reserved by OMNIA Partners for partner suppliers. Booth space will be purchased and staffed by Supplier. In addition, Supplier commits to provide reasonable assistance to the overall promotion and marketing efforts for the NIGP Annual Forum, as directed by OMNIA Partners.**
 - vi Design and publication of national and regional advertising in trade publications throughout the term of the Master Agreement**
 - vii Ongoing marketing and promotion of the Master Agreement throughout its term (case studies, collateral pieces, presentations, promotions, etc.)**
 - viii Dedicated OMNIA Partners internet web-based homepage on Supplier's website with:**
 - OMNIA Partners standard logo;**
 - Copy of original Request for Proposal;**
 - Copy of contract and amendments between Principal Procurement Agency and Supplier;**
 - Summary of Products and pricing;**
 - Marketing Materials**
 - Electronic link to OMNIA Partners' website including the online registration page;**
 - A dedicated toll-free number and email address for OMNIA Partners**

As stated above, Hyland currently holds the Software Solutions and Services contract with OMNIA Partners, and has already positioned this contract as a valuable tool that eligible customers can take advantage of. We will continue the existing marketing and sales outreach strategies to keep building interest in and use of the Contract. These strategies have shown proven success, as we've seen a tremendous increase in sales throughout the life of the existing OMNIA Partners contract. Hyland will continue marketing and selling our products and services through our reseller channel and directly from our Sales team here at Hyland, but will take specific actions after selection to begin increasing awareness of a new contract award. Our marketing and sales strategies will include a mix of face-to-face marketing, web presence, online communities, email campaigns, and social media to reach customers and educate them about the value of our solutions as well as the benefits of the Contract.

For a large organization like Hyland, the 10 and 90 day timeline expectations are unrealistic. Hyland will put forth a good faith effort to implement the plans below within a realistic timeframe for our organization and commits to continuing to partner with OMNIA Partners to ensure the success of a new Master Agreement.

Hyland cannot commit to the requirements to design and publish co-branded marketing materials and advertise in trade publications. Print marketing is not a part of Hyland's current marketing and sales strategies. Furthermore, without more details on the actual commitment requested, Hyland cannot commit to attending and participating in the OMNIA Partners national, regional, and supplier-specific tradeshows as well as the requirement to attend and exhibit at the NIGP Annual Forums. The requirement to participate in OMNIA Partners tradeshows is vague. It is not clear how many events Hyland would be required to attend on an annual basis, or how much the participation in these events would cost. Hyland's marketing budget is reviewed and approved on an annual basis and these commitments need to be planned for. Hyland requires additional information to be provided by OMNIA in order to be able to determine the budgetary impacts of these requirements and seek approval from the Marketing Team.

Press Releases – Upon award, and with the collaboration of ESC and OMNIA, Hyland will create and distribute press releases to appropriate media outlets about selection for participation in the Contract. We will also publish this release to the News section of the Hyland website as well as through a blog post on our Community page for partners to see.

Organization Participation – As a part of our marketing strategy, Hyland participates in many governmental and public procurement associations at all levels. Hyland will endeavor to continue advertising efforts through these mediums throughout the term of the Contract.

Social Media – Hyland makes use of Twitter, Facebook, the corporate blogs and online communities to publish content, take thought leadership positions, and pursue marketing strategies. We will use these platforms to drive traffic to our site.

Websites – Hyland will create a landing page on our own website specifically for this Contract. The webpage will contain pricing information, contact and ordering information, information on how to become a Participating Agency with OMNIA, as well as links back to Hyland's vendor webpage on the OMNIA site. Hyland takes exceptions to the requirement of having a toll-free phone number dedicated to OMNIA Partners.

Video – Hyland will create informational videos and instructional webinar recordings as a way to communicate the value of the Hyland products and services, and to demonstrate solutions. Marketing videos will present Contract information and will direct potential customers to the Hyland landing page and OMNIA website for purchase procedures and other information.

Events – Hyland attends a number of conferences and trade shows each year. Attendance and exhibits at events will be determined on an annual basis based on budget. These events are supported by the other elements of this marketing plan.

Direct Email Campaigns – Hyland utilizes automated email campaigns as a way to reach the greatest number of people across many titles and roles in the public sector. Should OMNIA Partners provide a list of eligible customers, Hyland will, upon selection, utilize these of customers eligible to announce the availability of the Hyland products and services through the Contract. Additionally, Hyland runs a number of solution-based and CIO campaigns that review the features and functionalities of the Hyland products and services.

Typically, Hyland runs approximately 15-18 of these campaigns annually. Callers and account managers will reinforce the Contract as a procurement vehicle in follow-up calling to interested customers.

C. Describe how Supplier will transition any existing Public Agency customers' accounts to the Master Agreement available nationally through OMNIA Partners. Include a list of current cooperative contracts (regional and national) Supplier holds and describe how the Master Agreement will be positioned among the other cooperative agreements.

Hyland has a number of public agency customers who previously purchased software solutions and services by means other than a procurement contract. These customers are currently subject to different pricing and terms and conditions than typically offered to customers who utilize a procurement contract for purchasing. As a result, Hyland cannot transition all existing public agency customer accounts to the OMNIA Master Agreement, but Hyland will agree to work with any public agency customer who currently owns a perpetual solution acquired by other means, to transition to a subscription licensing model that includes hosting by Hyland through the OMNIA Master Agreement.

Hyland currently holds the following cooperative purchasing agreements:

Cooperative Purchasing Agreement	Expires	Annual Sales Volume
General Services Administration (GSA)	March 31, 2021	Approximately \$12,000,000
Ohio State Term Schedule	March 31, 2021	Approximately \$6,000,000
Texas Department of Information Resources	August 15, 2021	Approximately \$2,000,000
South Carolina State Term	October 23, 2018	Approximately \$1,500,000
Pennsylvania COSTARS	May 20, 2019	Approximately \$600,000
OMNIA Partners (TCPN/NIPA)	May 30, 2020	Approximately \$5,000,000
NASPO ValuePoint	September 15, 2026	New Award as of July 2019

As you can see, Hyland's existing OMNIA Partners contract is our largest cooperative at the national level. Because this contract can be used by customers all across the United States, it is the cooperative agreement that we market the most to customers whose procurement regulations allows them to use this particular cooperative. While some State government customers are mandated by procurement regulation to use their State-run vehicles, many customers are able to use and prefer the OMNIA Partners Contract. When procurement regulations allow for us to market this Contract directly to end users, we will educate customers on the value of OMNIA, the benefits of using the Contract, and walk them through the process of registering with OMNIA if necessary.

D. Acknowledge Supplier agrees to provide its logo(s) to OMNIA Partners and agrees to provide permission for reproduction of such logo in marketing communications and promotions. Acknowledge that use of OMNIA Partners logo will require permission for reproduction, as well.

Acknowledged.



E. Confirm Supplier will be proactive in direct sales of Supplier's goods and services to Public Agencies nationwide and the timely follow up to leads established by OMNIA Partners. All sales materials are to use the OMNIA Partners logo. At a minimum, the Supplier's sales initiatives should communicate:

- i Master Agreement was competitively solicited and publicly awarded by a Principal Procurement Agency**
- ii Best government pricing**
- iii No cost to participate**
- iv Non-exclusive contract**

Hyland confirms we will be proactive in direct sales under the Contract and will follow up promptly to any leads established by OMNIA. The marketing plans outlined in numbers A and B above will be started immediately after award and continued throughout the life of the Contract. Our Account Managers in the public sector and in the partner channel will be educated to ensure the communications to our customers include information about the master OMNIA agreement being a non-exclusive, competitively bid Contract that involves no cost to participate. Hyland will agree to educate the customers on best pricing and pre-negotiated terms that come along with use of the Contract. All of the initiatives will be incorporated into the already proven successful sales processes used by the Hyland sales teams.

F. Confirm Supplier will train its national sales force on the Master Agreement. At a minimum, sales training should include:

- i Key features of Master Agreement**
- ii Working knowledge of the solicitation process**
- iii Awareness of the range of Public Agencies that can utilize the Master Agreement through OMNIA Partners**
- iv Knowledge of benefits of the use of cooperative contracts**

Information regarding this Contract will be available to our internal sales organization via an internal website managed by the Government Contracts team. The site will act as a hub for information and additional resources for Account Managers that wish to provide this data to customers. Additionally, we'll include information about the Contract in our existing sales playbooks, on our Sales Academy site, as well as the on our partner Community website. Hyland will create informational marketing pieces and other content that address the burdens of traditional procurement and how OMNIA may simplify buying procedures, and will include those pieces for download for sales internally as well as to our partner channel. Making the marketing material easy to find and reference will allow for a streamlined approach to selling under this vehicle.

Training for new employees, existing Account Managers, and partner resellers will be performed through recorded media, in-person training, and online webinars. The training will include information about the master OMNIA agreement being a non-exclusive, competitively bid Contract that involves no cost to participate. Hyland will agree to educate the sales departments on best pricing terms and how to provide this pricing to customers based on internal controls and procedures. Training will be completed by Sales Management and the Government Contracts team. These internal and external training initiatives will allow anyone in a sales role at Hyland to effectively communicate the most important features of the Contract to customers, and integrate the advertisement of this Contract into our existing sales processes.

G. Provide the name, title, email and phone number for the person(s), who will be responsible for:

- i **Executive Support**
- ii **Marketing**
- iii **Sales**
- iv **Sales Support**
- v **Financial Reporting**
- vi **Accounts Payable**
- vii **Contracts**

At Hyland, the Government Contracts team is the first point of contact for all procurement contract questions, issues and requests for assistance.

The primary point of contact for this Contract is:

Lisa McNeeley
Manager, Government Contracts
Phone: (440) 788-5468
Email: Lisa.McNeeley@hyland.com

H. Describe in detail how Supplier's national sales force is structured, including contact information for the highest-level executive in charge of the sales team.

Hyland's national sales force is broken up first and foremost by direct sales and sales made through our partner channel. The direct sales segment of Hyland is further broken down by vertical, or customer segment (i.e. healthcare, public sector, financial services, commercial, etc.). In each vertical, the Hyland Account Managers are assigned to specific regions.

The sales and marketing teams are managed at the highest level by:

Ed McQuiston
EVP, Chief Commercial Officers, Global Sales and Marketing
Phone: (440) 788-5000
Email: Ed@hyland.com

I. Explain in detail how the sales teams will work with the OMNIA Partners team to implement, grow and service the national program.

The Contract will be implemented within the guidelines of the marketing plan as outlined above. Hyland will also provide education to Account Management teams in order provide next level education opportunities to existing customer base with the help of the OMNIA. Hyland will look to our Supplier Relationship partner at OMNIA to schedule OMNIA-led training sessions with our sales and marketing teams upon award and whenever necessary throughout the life of the Contract. As previously discussed, Hyland will also educate and train our authorized partner network on this Contract in order to reach the largest number of prospective public agency customers.

J. Explain in detail how Supplier will manage the overall national program throughout the term of the Master Agreement, including ongoing coordination of marketing and sales efforts, timely new Participating Public Agency account setup, timely contract administration, etc.

Hyland's marketing and sales departments will be engaged in the efforts outlined throughout the Marketing and Sales section of this RFP response. The Government Contracts team will be responsible for providing administration support related to the Contract. Hyland will also engage OMNIA to coordinate regular marketing sync calls and engage with our sales team directly for education initiatives. Throughout the life of the contract, Hyland will work with OMNIA in support of customer inquiries as necessary. New customers will be set up quickly after expressing interest in using the Contract. The Government Contracts and sales teams will work together to set up customer accounts appropriately in our Salesforce system and will flag accounts to ensure pricing and terms of the Contract are referenced appropriately.

K. State the amount of Supplier's Public Agency sales for the previous fiscal year. Provide a list of Supplier's top 10 Public Agency customers, the total purchases for each for the previous fiscal year along with a key contact for each.

Hyland is a privately held company. It is Hyland's policy that we do not disclose sales data specific to particular customers or industries. For approximate sales figures relating to Hyland's cooperative contracts, please see the chart on page 22.

For a list of references, please see the attached [References](#) on page 39.

L. Describe Supplier's information systems capabilities and limitations regarding order management through receipt of payment, including description of multiple platforms that may be used for any of these functions.

Hyland uses a number of internal and third party solutions to manage customer information, quotes, purchases, invoices, and contracts. Hyland uses Salesforce as its primary CRM for the sales team. Hyland has configured our Salesforce instance to use an account flag to identify specific customer accounts using the Contract. The account flags also permit access to Contract pricing for generating quotes for Contract customers through the use of the Configure Price Quote (CPQ) tool that is integrated into Salesforce. The account flags also serve as a checkpoint for pricing and terms tracking when Purchase Orders (POs) are submitted to our Order Processing team. Once POs are processed and entered into our system, the orders are sent to the Licensing and Invoicing teams to issue licenses and invoices as applicable. Invoices are generated through Workday. Workday allows us to keep track of Contract pricing and terms on the backend as well.

M. Provide the Contract Sales (as defined in Section 10 of the National Intergovernmental Purchasing Alliance Company Administration Agreement) that Supplier will guarantee each year under the Master Agreement for the initial three years of the Master Agreement (“Guaranteed Contract Sales”).

\$ _____.00 in year one

\$ _____.00 in year two

\$ _____.00 in year three

To the extent Supplier guarantees minimum Contract Sales, the administration fee shall be calculated based on the greater of the actual Contract Sales and the Guaranteed Contract Sales.

\$1M in year one

\$1M in year two

\$1M in year three

Through the current OMNIA/Hyland partnership, Hyland has been very successful in working with prospective customers to adopt the OMNIA Contract for their purchasing needs. However, many of these customers determine their own procurement policies or are subject to state procurement requirements that dictate how they procure and whether they are permitted to use procurement contracts generally or the OMNIA Contracts in particular. As a result, Hyland is not in a position to guarantee sales under the Contract.

N. Even though it is anticipated many Public Agencies will be able to utilize the Master Agreement without further formal solicitation, there may be circumstances where Public Agencies will issue their own solicitations. The following options are available when responding to a solicitation for Products covered under the Master Agreement.

- i Respond with Master Agreement pricing (Contract Sales reported to OMNIA Partners).
- ii If competitive conditions require pricing lower than the standard Master Agreement not-to-exceed pricing, Supplier may respond with lower pricing through the Master Agreement. If Supplier is awarded the contract, the sales are reported as Contract Sales to OMNIA Partners under the Master Agreement.
- iii Respond with pricing higher than Master Agreement only in the unlikely event that the Public Agency refuses to utilize Master Agreement (Contract Sales are not reported to OMNIA Partners).
- iv. If alternative or multiple proposals are permitted, respond with pricing higher than Master Agreement, and include Master Agreement as the alternate or additional proposal.

Detail Supplier’s strategies under these options when responding to a solicitation.

Hyland takes exception to this section as it seeks to impose obligations on Hyland beyond the scope of the ESC/OMNIA relationship. Hyland cannot be in a position where Hyland is subject to contractual obligations, reporting or otherwise, for its commercial sales that do not involve the ESC/OMNIA relationship.

ii **The successful Offeror will be required to sign Appendix D, Exhibit B, OMNIA Partners Administration Agreement prior to Contract award. Offerors should have any reviews required to sign the document prior to submitting a response. Offeror’s response should include any proposed exceptions to OMNIA Partners Administration Agreement on Appendix B, Terms and Conditions Acceptance Form.**

This is acceptable, subject to the parties’ execution of a mutually acceptable final and binding agreement which may include mutually acceptable revisions to such terms. For your reference, a form of Hyland’s standard licensing and support agreement has been included in Tab 6 – Additional Required Documents under [e. Any additional agreements Offeror will require Participating Agencies to sign, Sample Agreements](#) on page 46.

Please see the attached draft of Appendix D, Exhibit B below.

Note: Double-click the document icon below to open and view all pages. For hard copy full documents immediately follow.

APPENDIX D, EXHIBIT B











Appendix D, Exhibit C - Per Hyland's edits to Section 10 of the proposed Administration Agreement, this does not need to be included as an exhibit to the contract.

a. OMNIA Partners documents (Appendix D)

iii **Include completed Appendix D, Exhibits F. Federal Funds Certifications and G. New Jersey Business Compliance.**

Note: Double-click the document icon below to open and view all pages. For hard copy full documents immediately follow.

EXHIBIT F – FEDERAL FUNDS CERTIFICATIONS	 Exhibit F
EXHIBIT G, DOC 1 – OWNERSHIP DISCLOSURE FORM	 Exhibit G, Doc 1
EXHIBIT G, DOC 2 - NON-COLLUSION AFFIDAVIT	 Exhibit G, Doc 2
EXHIBIT G, DOC 3 - AFFIRMATIVE ACTION AFFIDAVIT	 Exhibit G, Doc 3
EXHIBIT G, DOC 4 - POLITICAL CONTRIBUTION DISCLOSURE FORM	 Exhibit G, Doc 4
EXHIBIT G, DOC 5 - STOCKHOLDER DISCLOSURE CERTIFICATION	 Exhibit G, Doc 5
EXHIBIT G, DOC 6 - CERTIFICATION OF NON-INVOLVEMENT IN PROHIBITED ACTIVITIES IN IRAN	 Certification of Non-Involvement
EXHIBIT G, DOC 7 – NEW JERSEY BUSINESS REGISTRATION CERTIFICATE (HYLAND CERTIFICATE OF GOOD STANDING)	 Hyland Certificate of Good Standing

iv Describe how Offeror responds to emergency orders.

Hyland will work with customers at the task order level to expedite orders when necessary.

Hyland offers a standard maintenance program that includes 24x7 support of all licensed software. Customer requirements for enhanced response can include on-call, on-site presence and specified error correction, and solution support time frames. Premium support services are contracted under service level agreements. In addition, database verification and database administration services can be negotiated as addendums to standard and premium support services. All maintenance offers 24x7 support, upgrade support, fixes, and new releases. Support is extended to a free instance for testing and development.

v What is Offeror's average Fill Rate?

Fill Rate is not applicable to software or related services.

vi What is Offeror's average on time delivery rate? Describe Offeror's history of meeting the shipping and delivery timelines.

Hyland provides software licenses immediately upon processing a customer's Purchase Order. Our services offerings are timely, and provided as requested by the customer and as outlined and agreed upon in the Services Proposal.

vii Describe Offeror's return and restocking policy.

Pursuant to the terms of Hyland's standard Master Software License, Services and Support Agreement, Hyland offers a performance warranty on the software, which provides that, during the warranty period, the software will perform in accordance with the applicable documentation. During this warranty period, you are permitted to use the software in any type of environment that you deem appropriate (i.e., production or non-production) and are permitted to test the software using any testing criteria that your organization deems appropriate. In the event a non-conformity is found during such warranty period and you notify Hyland of the same, Hyland will repair/replace the non-conforming software (at no additional charge). In the event that Hyland is unable to make such repair or deliver a replacement, Hyland will refund any applicable software license fees to you. Please note that in the event a non-conformity arises after the expiration of the warranty period, Hyland will work to correct any such non-conformities as part of your purchase of annual maintenance and support.

viii Describe Offeror's ability to meet service and warranty needs.

Hyland has 25+ years of experience working with different solutions. There are more than 600 resources delivering solutions and/or redefining project methodologies and providing support to those directly in the field in Hyland Global Services, as well as the support of the entire Technical Support, Quality Assurance, and Development teams. The combination of these resources brings enormous amount of knowledge to our customer's solution, whether it be business cases, or technical detail, down to software code for enhancements. Hyland Global Services has direct experience across multiple industries, as well as extensive back office knowledge which crosses all industries.

Pursuant to the terms of Hyland's standard Master Software License, Services and Support Agreement, Hyland offers the following 60-day warranty on the software: For a period of sixty (60) days from the date that license codes or a certificate necessary for a user to activate the software for production use have been delivered to such user, Hyland warrants to user that the software, when properly installed and properly used, will function in all material respects as described in the user documentation.

ix Describe Offeror's customer service/problem resolution process. Include hours of operation, number of services, etc.

Hyland Technical Support is available 24/7, excluding major US holidays (New Year's Day, July 4th, Thanksgiving Day, and Christmas Day). We will provide production emergency support via our after-hours paging system during the observed holidays. In cases where Technical Support is closed, or all analysts are busy assisting others, you will be asked to leave a voicemail with your name, company name, and a phone number where you can be reached. The support analyst on-call will be paged and will respond within a reasonable amount of time (usually within 20 minutes, but not more than three hours).

Hyland Technical Support offers multiple self-service and assisted support opportunities to assist customers in resolving issues being experienced with their implemented Hyland technology solution.

Self-service support

Product documentation and a knowledge base are available on the online support portal for customers to grow their expertise as well as to research and resolve issues without the need to engage the Technical Support team directly. Technical Support knowledge team members are continually contributing robust technical content to ensure the knowledge base is a relevant and dynamic reference repository.

Additionally, the functionality of the online support portal provides a superior and tailored online experience that empowers users to:

- Create, update and view the status of support issues
- Securely download software and utilities
- Search the online product documentation
- Search the knowledge base for solutions to common technical issues
- Review training course schedules, outlines and agendas
- Access available e-learning modules for self-study
- Keep informed of the latest Hyland technology announcements
- Access user-driven, peer forums and user groups focused on technologies, solutions and industries

Assisted support

Technical Support is focused on compressing the time frame from issue inception to resolution while providing a remarkable support service experience. In support of this goal, we deliver support via a strategic, multi-layered approach:

- Hyland Technical support is readily accessible through two channels: online support portal or phone for high-impact issues.
- Support requests submitted via the support portal are routed to an available and knowledgeable Technical Support resource with the proper alignment of experience and product expertise to resolve each specific issue.
- High impact issues reported by phone are addressed based on the product and scope of impact.

- The assigned Technical Support resource works directly with you, following up as often as needed based on the nature of your issue to drive issue resolution.
- A Technical Support success advisor is engaged for any concerns related to the delivered support experience, and assists with any non-technical support requests. The success advisor monitors issue progress, engages additional Hyland resources and communicates with the customer as needed until the issue is resolved.
- The Technical Support analyst team has direct access to Research & Development for assistance with software errors. For solution related issues, the analysts work with the Global Services team to provide resolution.
- Technical Support management is notified of issues that have an acute business impact in your environment so they can provide any additional resources that may be necessary to resolve the issue.

x Describe Offeror's invoicing process.

Purchase Orders are received by Hyland typically via email, and are processed by the Hyland Order Processing team. This team ensures Contract pricing is adhered to when the order is entered into Hyland's internal order management system. The orders are then forwarded to the Licensing and Invoicing teams within Hyland's Finance department. The Licensing team is responsible for issuing any new licenses and the Invoicing team is responsible for generating an invoice for the customer. The Finance department is responsible for ensuring invoices are paid by following up and tracking any additional contractual invoicing requirements for each customer with the use of our Workday system.

xi Describe Offeror's contract implementation/customer transition plan.

Hyland uses a number of internal and third party solutions to manage customer information and contracts. Hyland uses Salesforce as its primary CRM. Hyland's particular Salesforce instance uses an account flag to identify the purchasing contracts used by each customer. When customers choose to use the OMNIA Partners Contract, Hyland's Government Contracts team will update the account flag accordingly in Salesforce. This account flag will then permit access to Contract pricing for generating quotes through the use of the Configure Price Quote (CPQ) tool. The account flags also serve as a checkpoint for terms tracking when Purchase Orders (POs) are submitted to our Order Processing team. Once POs are processed and entered into our system, the orders are sent to the Licensing and Invoicing teams to issue licenses and invoices as applicable. Invoices are generated through Workday. Workday notes and term tracking features allow us to reference Contract pricing and terms effectively on the backend as well. As soon as the customer's account is set up to reflect the OMNIA Partners contract in Salesforce, the rest of our system provides much of the transition and contract implementation processes automatically.

xii Describe the financial condition of Offeror.

Hyland is recognized as a leader in Content Services Platforms. Our software solution suite enables organizations to capture, manage, access, integrate, measure and store content, processes and cases with employees, business partners, customers and other constituents, deployed on-premises or in the cloud. Our software is sold directly to end users as well as indirectly through a channel of solution providers made up of value-added resellers and original equipment manufacturers. We also perform a broad set of services related to our software including hosting, consulting, implementation, education, project management and other services. We have provided software and services to more than 20,000 organizations in 103 countries, making Hyland one of the largest independent content services vendors in the world.

Hyland is a high-value, low-risk company built on stability and focus, as evidenced by our industry leading customer retention rates and year-after-year double-digit growth. Our compound annual revenue growth rate since 2007 is 20%.

We maintain this stability by continually reinvesting in the development of our products. We typically spend approximately 15% of our revenue annually on research and development (R&D) of our product suite. In 2018, we spent \$107.6 million on R&D.

Financial statements can be made available upon the execution and return of an appropriate non-disclosure agreement.

xiii Provide a website link in order to review website ease of use, availability, and capabilities related to ordering, returns and reporting. Describe the website's capabilities and functionality.

Hyland does not permit electronic ordering due to the sophisticated nature of our software solutions and services offerings. Customers should work with their existing Account Managers to address questions relating to product or technical information, as well as ordering, returns, and reporting. Prospective customers can connect with Hyland's Government Contracts team at governmentcontracts@hyland.com for more information.

xiv Describe the Offeror's safety record.

Hyland has various safety/security policies and programs in place, in the way of a Disruption Action Plan, Safety Task Force Team, Safety Captain Team, etc. These policies can be provided upon request. As far as a safety record or log, incidents are tracked in the event there is a campus safety incident.

xv Provide any additional information relevant to this section.

None at this time.

TAB 4 – QUALIFICATION AND EXPERIENCE

i Provide a brief history of the Offeror, including year it was established and corporate office location.

Hyland is a leader in providing software solutions for managing content, processes and cases for organizations across the globe. Founded in 1991, Hyland has enabled customers to digitalize their workplaces and fundamentally transform their operations.

We thrive on new ideas and diverse perspectives. Our mission is to help our employees, customers and partners achieve their full potential. We believe Hylanders can accomplish anything when they have the freedom to innovate, be creative and embrace the future. That, and an intense dedication to our core values, is what our award-winning software is built on.

Our customers continue to see the ongoing value of partnering with us. Hyland is a high-value, low-risk company built on stability and focus, as evidenced by our industry leading customer retention rates and year-after-year double-digit growth. Named one of Fortune's Best Companies to Work For® since 2014, Hyland is widely known as both a great company to work for and a great company to do business with.

Our headquarters is located in Westlake, Ohio. We have 30 office locations and dozens of remote Hylanders in 22 countries around the world. For a complete listing of our office locations visit our website at: www.hyland.com

Additional facts:

- More than 3,300 employees worldwide
- Industry leading customer retention rates
- 15% of revenue is reinvested in ongoing product research and development
- 20% compound annual revenue growth rate since 2007
- Sold direct and through channel – VARs, OEMs and system integrators
- Built and delivered by industry experts in Healthcare, Government, Financial Services, Insurance, Commercial and Higher Education
- Partners with Microsoft®, HP®, Oracle®, SAP®, Infor®, Esri®, Workday®, Konica Minolta, Xerox and CITRIX®

ii Describe Offeror's reputation in the marketplace.

Hyland's content services focus, comprehensive product portfolio and customer-centric culture have enabled our aggressive growth in the information and content management market since our foundation in 1991. According to leading enterprise content management (ECM) industry analyst firms like Gartner's Market Share research (August 2018), Hyland is the fourth largest Content Services Platform (CSP) vendor (in terms of total CSP-related revenue). Additionally, Hyland is the second largest independent CSP vendor (in terms of total CSP-related revenue).

iii Describe Offeror's reputation of products and services in the marketplace.

Hyland has focused its enterprise information platform on content management, process management and case management capabilities for small and midsize businesses (up to 1,000 employees) and mid-tier enterprises (up to 2,500 employees) and increasingly to larger enterprises. Hyland primarily sells directly in select vertical markets including healthcare, government, financial services, insurance, higher education and other commercial industries. Additionally, Hyland leverages its broad channel of value-added resellers and OEM partners to extend into a broader customer base and international markets.

Market activities center on:

- Strong growth in North America but limited market presence in regions other than Latin America; investments have been made in EMEA and Asia / Pacific as well as for the Hyland Cloud, a software as a service (SaaS)-based offering.
- Frequent and focused M&A actions to obtain market-specific technologies, vertical market presence and professional services expertise. In 2017 Hyland acquired the Perceptive business unit from Lexmark, adding 5,000 customers across the globe and a significant range of content services capabilities, including intelligent capture, enterprise search and robust Healthcare EMI offerings.
- Emphasis on customer satisfaction, moderate deployment costs and integration with vertical market-specific vendors.

iv Describe the experience and qualification of key employees.

Just as customers have had a major impact on Hyland's development, without strong management and an employee base that believes in the driving forces behind Hyland, we would not be the elite content management solution that it is today. What once began as a two (2) employee operation has grown to more than 3,100 employees working together to deliver Hyland solutions throughout North America, Latin America, Australia, Europe and Japan.

Hyland's Executive Management team:

Bill Priemer – President, Chief Executive Officer (CEO) - Bill joined Hyland in 1997 as Vice President of Marketing. He became Vice President of Sales and Marketing in 2001, Chief Operating Officer in 2005, and CEO in January 2013. Prior to joining Hyland, Bill worked at FedEx Corporation and at AST Research, a personal computer manufacturer. Bill received a master's degree in Marketing from Northwestern University and undergraduate degrees from Boston College. He was born and raised in Northeast Ohio. While he has lived elsewhere and travels extensively, he is happy and proud to call the Cleveland area home. Bill serves on the boards of John Carroll University and of BVU: The Center for Non-Profit Excellence. He has been a member of Vistage International since 2010.

Chris Hyland – Executive Vice President (EVP), Chief Financial Officer (CFO) - Chris joined Hyland in 1992 and has served on the Board of Directors since 1993 and as Chairman of the Board since 2002. He has been the Executive Vice President since 2001 and Chief Financial Officer and Treasurer since 1994. He serves on the Board of Directors of University Hospitals Cleveland Medical Center and is a member of the Board of Directors of the Cuyahoga Community College Foundation. He is a member of the National Association of Corporate Directors. Chris earned his bachelor's degree in Economics from Ohio Wesleyan University.

Ed McQuiston – Executive Vice President (EVP), Chief Commercial Officer - Ed joined Hyland in 2001 as the Director of Healthcare Solutions. In 2016, he was promoted to Senior Vice President of Global Sales & Marketing. Having served as Vice President of Global Sales since 2012, Ed took on the responsibility of aligning Marketing and Sales in support of Hyland's global expansion. In 2017, Ed was promoted to Executive Vice President & Chief Commercial Officer. His tenure at Hyland and extensive knowledge of Hyland solutions helps support and expand Hyland's strategic initiatives. With more than 20 years of experience in the information management and advanced capture industries, Ed focuses on collaborating Hyland's global sales and marketing programs and vertical-specific initiatives with worldwide trends, positioning Hyland as the go-to vendor for information management solutions. He serves on the Board of Directors for the Association for Information and Image Management (AIIM).

John Phelan – Executive Vice President (EVP) & Chief Product Officer - John began his career at Hyland in 1999 as a Quality Assurance Representative. As the company began delivering Workflow services, he joined what would become the Professional Services group, where he consulted and managed for 10 years. In 2011, John became the Vice President of Information Systems when Hyland was looking to bring a stronger business perspective to its own internal IT. John led the team through significant growth and acquisitions. In August of 2017, he returned to Research and Development as the Vice President of R&D Operations. As EVP & Chief Product Officer, he brings a wealth of experiences as he leads Hyland's efforts to support the development of products and solutions.

Noreen Kilbane – Executive Vice President (EVP) & Chief Administrative Officer - Noreen Kilbane joined Hyland in 1993 and has been a part of several departments throughout the years. She was appointed Senior Vice President of Administration in March 2016, and in 2017 was promoted to Executive Vice President & Chief Administrative Officer. Her role in Operations has allowed her to develop and implement processes to make the Accounting department more effective and efficient. Noreen received her B.A. in Accounting from Baldwin-Wallace University.

Tim Pembridge – Executive Vice President (EVP) & Chief Risk Officer - Tim Pembridge joined Hyland in 2001 and currently serves as Executive Vice President & Chief Risk Officer. Tim manages the company's legal affairs and maintains its corporate records. Prior to joining Hyland, Tim was a shareholder with Nischwitz, Pembridge & Chriszt Co., L.P.A. from 1996 to 2001, and a partner with Calfee, Halter & Griswold LLP from 1990 to 1995. Tim received a J.D. from Cornell Law School in 1982 and a B.S. in Environmental Resource Management from Allegheny College in 1979. He is a member of the Association of Corporate Counsel and the Cleveland Bar Association.

Hyland Technical Support:

All employees hired into a technical position at Hyland start their career with four weeks of OnBase training through our Education Services department. Upon successful completion of that training, technical support staff receive an additional four weeks of training within Hyland Technical Support's internal training team before being assigned to their permanent team.

Continuing education in the many technologies that our customers depend on is a priority within the team. Technical Support team members are encouraged to enhance their skills by learning new technologies either on their own or by attending company- sponsored technology training throughout the year.

In addition to ongoing technical training, team members meet regularly to discuss all aspects of providing an exceptional support experience for our global customer base. Meetings are held to thoroughly understand customer needs, review specific issues customers are experiencing, ensure support experience quality assurance efforts are being delivered as desired, provide accurate issue documentation and ensure support delivery is timely and delivers maximum value for our customers.

Hyland's Professional Services team:

Professional Services – The Hyland Professional Services Group is comprised of Workflow and Case Management Business Consultants who have an average of 8 years' service as technical professionals. This group works directly with customers to analyze business processes and implement solutions using the Hyland product suite with a specific focus on Workflow processing and Case Management applications. These business process automation solutions are the key to realizing organizational and business process efficiencies and maximum ROI of the Hyland software.

The Professional Services Group gathers and documents business process requirements, designs and implements Hyland software solutions, trains users and administrators and supports production go-live. As well, the Professional Services Group provides recommendations on best practices and industry standards related to solution implementations. The Professional Services Group implements both enterprise level solutions across major vertical markets, as well as departmental solutions.

Implementation Services – The Hyland Implementation Services Group is comprised of professional certified Hyland Technical Consultants who have the knowledge and experience necessary to deploy Hyland solutions.

Technical Consultants design, configure and train on almost every Hyland installation performed by Hyland. A Technical Consultant's primary focus typically lies with the core implementation of Hyland, which includes the base installation and setup of all infrastructure related areas (e.g. OnBase database/file/web servers, etc.). The Technical Consultant is also responsible for designing and configuring the optimal document and keyword taxonomy, methods for processing or ingestion of documents, as well as identifying end user needs for access and retrieval of stored documents.

Our Implementation Services Group average 7 years of practical experience in technical consultation as well as general software installation and support. Collectively, the Implementation Services Group has deployed thousands of solutions, while also managing many other engagements for expansions and upgrades, just to name a few. Our expertise lies across multiple vertical markets, as well as with specific solutions and applications. Technical Consultants play a pivotal role in just about every engagement and ultimately contribute to the direct success of each and every project.

Project Management – Hyland Global Services Project Management is comprised of a group of professional Project Managers, Consultants, and Practice Leaders who have accumulated an average of 10 years of service as technical professionals with specific expertise in project management. The project management professionals have facilitated and managed many enterprise level implementations across multiple vertical markets where they have directly contributed to project success by providing expertise in budget management, project communication, resource management and scheduling, project planning and tracking, scope definition and control, and solution requirements definition.

Enterprise Solutions – The Hyland Enterprise Consulting Group is dedicated to providing enterprise planning services, strategy and support for project sponsors and customer management teams. Enterprise Consultants have an average 10 years ECM and management consulting experience.

The Enterprise Consulting Group provides services for ensuring organizations understand all the requirements for an enterprise solution. This includes performing comprehensive reviews of current state deployments and future state requirements, cost-benefit analyses, infrastructure assessments, individual solution assessments and change management practices.

The Enterprise Consulting Group also provides strategic consulting and advising on a number of core enterprise planning topics such as records management, taxonomy and classification, conversion strategies, quality control, support and team building, governance and change management. Following a proven methodology, along with Lean and Six Sigma tools, discovery is performed at all organizational layers to best understand goals, challenges, needs, and bottlenecks to help organizations discover the value in working smarter every day.

Education Services – The Hyland Education Services Group is dedicated to helping partner organizations achieve competency in their role as designers, developers, implementers, and supports of world-class Hyland solutions. Hyland’s training programs provide meaningful, relevant, and timely instruction that matches capabilities to learners’ roles. Hyland provides classroom, online, self-paced, video, conference, and e-learning education programs that ensure ECM professionals help customers realize the full potential of their investment.

Hyland’s education programs create a comprehensive and complete experience for partner organizations. The programs are dedicated to ensure the success of professionals who are ultimately responsible for the success of a Hyland implementation. Hyland is dedicated to guiding individuals to understand, learn, and grow their expertise and realize the full benefits a Hyland solution can provide to their customers in a fashion that meet best practice guidelines, is supportable, and will scale as the solution expands across the organization.

v Describe Offeror’s experience working with the government sector.

Hyland has been selling into the government sector since inception in 1991. Our solutions offer faster, affordable content services platform for every level of government. Hyland understands the challenges of modernization, tight budgets, and constituent needs. We have more than 2,300 government customers today. Our solutions allow for an easily-sustainable foundation that’s scalable across any government organization as it evolves.

More than 20 years ago, Hyland applied for and received its first General Services Administration (GSA) Schedule 70 contract, which was managed successfully for its entire term. Hyland rebid and was awarded a second contract with GSA in 2016, which has been successfully implemented and managed since its award. Additionally, Hyland has experience managing and reporting on multiple national and state term contracts, as outlined above, and we’re in the process of implementing a brand new NASPO ValuePoint Cloud Solutions contract. All of the cooperative procurement vehicles held by Hyland today can be used to support customers in various levels government.

vi Expertise working with the public sector and understanding of the unique technical and regulatory requirements

Hyland has more than 28 years' experience working in the public sector. Our government customers now number more than 2,300 and our higher education vertical accounts for more than 9,900 customers today. Our public sector solutions deliver all the information customers need in the context or core systems integrations, within budget. Many of Hyland's solutions were designed with the public sector in mind. Our software reduces cost, development time and departmental siloes by rapidly creating content-enabled solutions with low-code application

In addition, Hyland has experience managing and reporting on many federal, state, and national cooperative contracts. We have a Government Contracts team in place at Hyland. This team's responsibility is to manage the day-to-day operations of procurement vehicles. These responsibilities include being a resource for internal and external inquiries surrounding public procurement, managing pricelists and discount procedures, educating partner and customers about public procurement, and being a liaison for customers, managing agencies, and sales/marketing teams. Government Contracts' role is generally defined as providing subject matter expertise to Hyland and its customers through a robust understanding of technical and regulatory requirements.

vii License to do business in all 50 states

Yes.

viii Describe past litigation, bankruptcy, reorganization, state investigations of entity or current officers and directors.

Although Hyland has been involved in litigation, no litigation exists that would impact Hyland's ability to provide the products or services proposed in Hyland's RFP response.

Hyland has not declared bankruptcy or reorganized in the past and is not currently involved in either activity.

Cuyahoga County, Ohio is a customer of Hyland Software, Inc. In 2018, Hyland Software, Inc. received several subpoenas from the Cuyahoga County Prosecutor's office in connection with that office's investigation of public corruption issues involving personnel of the Cuyahoga County Information Technology department. To date, Hyland has received multiple grand jury subpoenas for the production of documents, other informal requests for documents and employee interviews, and has also had employees testify before the grand jury. Hyland has been cooperating with the investigation. Hyland has been advised by prosecutors that it may be a subject of one aspect of the investigation, associated with the extension by a Hyland employee of an offer to one employee of Cuyahoga County to attend an executive dinner sponsored by Hyland to which multiple customers were invited.

a. References

ix Provide a minimum of 10 customer references relating to the products and services within this RFP. Include entity name, contact name and title, contact phone and email, city, state, years serviced, description of services and annual volume.

Hyland encourages prospective customers to engage our current customers to hear for themselves why Hyland is an industry leader. However, in order to respect the privacy and time demands of our existing customers, Hyland has instituted strict controls regarding dissemination of specific customer information including individual contact details. We have included the following customer information for your reference. We ask that you be respectful of their time and contact them in advance to schedule a call.

Hyland considers the requested information to be confidential and therefore it has been redacted.

x Provide any additional information relevant to this section.

Customer references provide a testament to our ability to provide an industry-leading, flexible, yet easy to use document management solutions.

TAB 5 – VALUE ADD

i **Provide any additional information related to products and services Offeror proposes to enhance and add value to the Contract.**

Hyland offers the following value-added services to our customers when requested:

Imaging Services - Hyland Imaging Services allows you to concentrate on creating new solutions to business problems while letting your users get more work accomplished faster. Outsourcing your imaging and indexing needs to Hyland increases the value and effectiveness of your solution by reducing the time it takes to process work. Your staff has more time to focus on and meet your core business objectives while we handle your imaging needs.

LawLogix, a division of Hyland - LawLogix solutions allow organizations to become and stay I-9 compliant in a world of ever changing compliance regulations. Using an automated compliance system ensures that an organization can reach their compliance goals in the most cost-effective manner possible.

TAB 6 – ADDITIONAL REQUIRED DOCUMENTS

Per the RFP requirements the requested documents have been included on the following pages.



a. Acknowledgment and Acceptance of Region 4 ESC's Open Records Policy (Appendix C, Doc #1)

Note: Double-click the document icon below to open and view all pages. For hard copy full documents immediately follow.

APPENDIX C, DOC 1 - ACKNOWLEDGMENT AND ACCEPTANCE OF REGION 4 ESC'S OPEN RECORDS POLICY



Appendix C - Doc 1

b. Antitrust Certification Statement (Tex. Government Code § 2155.005) (Appendix C, Doc #2)

Note: Double-click the document icon below to open and view all pages. For hard copy full documents immediately follow.

APPENDIX C, DOC 2 - ANTITRUST CERTIFICATION STATEMENT



Appendix C, Doc 2

c. Implementation of House Bill 1295 Certificate of Interested Parties (Form 1295) (Appendix C, Doc #3)

Note: Double-click the document icon below to open and view all pages. For hard copy full documents immediately follow.

**APPENDIX C, DOC 3 - IMPLEMENTATION OF HOUSE BILL 1295
CERTIFICATE OF INTERESTED PARTIES (FORM 1295)**



Appendix C, Doc 3

d. Texas Government Code 2270 Verification Form (Appendix C, Doc #4)

Note: Double-click the document icon below to open and view all pages. For hard copy full documents immediately follow.

**APPENDIX C, DOC 4 - TEXAS GOVERNMENT CODE 2270
VERIFICATION FORM**



Appendix C, Doc 4

e. Any additional agreements Offeror will require Participating Agencies to sign

Sample Agreements

Hyland considers the requested information to be confidential and therefore it has been redacted.

Notice

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