



# DU PAGE COUNTY

## Technology Committee

### Final Summary

421 N. COUNTY FARM ROAD  
WHEATON, IL 60187  
www.dupagecounty.gov

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Tuesday, March 5, 2024

11:00 AM

Room 3500B

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1. **CALL TO ORDER**

11:00 AM meeting was called to order by Chair Yeena Yoo at 11:00 AM.

2. **ROLL CALL**

<b>PRESENT</b>	Berlin, Cronin Cahill, Carrier, Eckhoff, Galassi, Gustin, Henry, Kaczmarek, Rutledge, White, and Yoo
<b>ABSENT</b>	Mendrick

3. **CHAIRWOMAN'S REMARKS - CHAIR YOO**

Chair Yoo thanked Network System Manager Joe Hamlin and his team for their work in rewiring the monitors and sound in the Board room renovation. She then discussed a project the IT department worked on with the State's Attorney's Office and the Secret Service. She said it was a sting to capture three individuals who were running a "pig butchering" scam against DuPage residents. She said CIO McPhearson will be presenting more information on that project later. Lastly, she said GIS Manager Tom Ricker will be presenting on a new application later in the meeting.

4. **PUBLIC COMMENT**

No public comments were offered.

5. **APPROVAL OF MINUTES**

5.A. [24-0684](#)

Approval of Minutes for the Technology Committee - Regular Meeting - Tuesday, February 6, 2024

**Attachments:** [2024-02-06 Technology Minutes \(summary\).pdf](#)

<b>RESULT:</b>	APPROVED
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Cynthia Cronin Cahill

6. **PROCUREMENT REQUISITIONS**

6.A. [TE-P-0006-24](#)

Recommendation for the approval of a contract purchase order to Toshiba Business Solutions, for multi-functional device equipment, supplies, software and service solutions, for all County Departments, for the period of April 1, 2024 through March 31, 2029, for a contract total amount not to exceed \$1,500,000; per lowest responsible bid

24-019-IT.

Member Carrier said according to the proposal, implementation begins in April 2024, to which Mr. McPhearson responded it actually begins after the contract is approved by the full County Board. He said the existing Canon contract ends March 31st, so we have to have the new contract and equipment in place by April 1st. Member Carrier asked when we will see the physical products installed in our departments. Mr. McPhearson said our plan is to implement over the two weeks following County Board approval. He said IT will also provide training so staff will know how to use the new equipment. Member Carrier asked if the machines are larger than the Canon equipment we currently have. Operations Manager Shanita Thompson said the proposal includes the most common copier, as it is closest to what we currently have. Mr. McPhearson said we are working with departments and elected officials' offices to identify their needs, such as larger or smaller devices. Member Carrier asked if there is a schedule for the rollout, to which Mr. McPhearson said there is not yet a schedule, but staff is working on everything in the background and will be able to share more information once the contract is approved.

**Attachments:**     [Toshiba \(Copiers\) - PRCC](#)  
                               [Toshiba \(Copiers\) - Bid Tab 24-019-IT](#)  
                               [Toshiba \(Copiers\) - Technical Proposal](#)  
                               [Toshiba \(Copiers\) - VED](#)

<b>RESULT:</b>	APPROVED AND SENT TO FINANCE
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Kathleen Carrier

6.B. [TE-P-0007-24](#)

Recommendation for the approval of a contract purchase order to Insight Public Sector, for the replacement of backup appliances and annual maintenance and support of Veritas Netbackup software, for Information Technology, for the period of April 1, 2024 through March 31, 2026, for a contract total amount of \$374,718.84; contract pursuant to the Governmental Joint Purchasing Act, 30 ILCS 525/2 (OMNIA Partners Contract #23-6692-03). (ARPA Item)

Mr. McPhearson explained that the Veritas system backs up all of our data throughout the entire County, so it is a critical system for us to have. He said the existing software will no longer be supported by the end of this year, so we have to upgrade. He said we will get a newer solution with more functionality. Additionally, he said, this solution also provides a disaster recovery option, which saves some of our data to the cloud, so if something should happen and data is wiped out, we should be able to store it at a different site. Member Rutledge asked if that includes a cyber attack, to which Mr. McPhearson responded yes.

**Attachments:**     [Insight - PRCC](#)  
                               [Insight - Omnia Contract #23-6692-03](#)  
                               [Insight - Quote #0227062825](#)  
                               [Insight - VED](#)

<b>RESULT:</b>	APPROVED AND SENT TO FINANCE
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Sheila Rutledge

6.C.     [24-0834](#)

Recommendation for the approval of a contract purchase order to Sergeant Laboratories, Inc., for annual Aristotle Insight Network licensing, for Information Technology, for the period of March 15, 2024 through March 14, 2025, for a contract total of \$25,746.69; per 55 ILCS 5/5-1022(d) exempt from bidding - IT/Telecom purchases which do not exceed \$35,000.

**Attachments:**     [Sergeant Laboratories - PRCC](#)  
                               [Sergeant Laboratories - Invoice #011724-C](#)  
                               [Sergeant Laboratories - GSA Schedule 70 Contract 47QTCA18D00DN](#)  
                               [Sergeant Laboratories - VED](#)

<b>RESULT:</b>	APPROVED
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Kathleen Carrier

6.D.     [24-0835](#)

Recommendation for the approval of a contract purchase order to Siteimprove, Inc., for the annual license fee for web governance services, for Information Technology, for the period of May 1, 2024 through April 30, 2025, for a contract total amount of \$18,444.96; per 55 ILCS 5/5-1022(d) exempt from bidding - IT/Telecom purchases which do not exceed \$35,000.

Mr. McPhearson explained that SiteImprove allows for us to keep track of web traffic statistics and manage different links.

**Attachments:**     [SiteImprove - PRCC](#)  
                               [SiteImprove - Quote #5286](#)  
                               [SiteImprove - VED](#)

<b>RESULT:</b>	APPROVED
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Kari Galassi

## 7. INFORMATIONAL ITEMS

Member Cahill moved, seconded by Member Gustin, to combine and place on file items 7A through 7D.

### 7.A. [HS-CO-0001-24](#)

Recommendation for the approval of an amendment to purchase order 6640-0001 SERV, for a contract issued to Benevate, Inc. D/B/A Neighborly Software, for the purchase of grants management software, to increase the contract in the amount of \$8,000 for the SmartyStreets add-on, resulting in an amended contract total amount not to exceed \$142,000, an increase of 5.97%. (ERA2 Grant-Funded)

**Attachments:**     [Neighborly - Change Order.pdf](#)  
                               [Neighborly - Decision Memo.pdf](#)  
                               [Neighborly - Vendor Ethics.pdf](#)

<b>RESULT:</b>	ACCEPTED AND PLACED ON FILE
<b>MOVER:</b>	Cynthia Cronin Cahill
<b>SECONDER:</b>	Patty Gustin

### 7.B. [24-0722](#)

Recommendation for the approval of a contract purchase order to CareVoyant, Inc., for CV hosting for large database and additional licenses, for the DuPage Care Center, for the period May 1, 2024 through April 30, 2025, for a total contract amount not to exceed \$22,800, per Other Professional Services.

**Attachments:**     [CareVoyant, Inc. Comprehensive Checklist.pdf](#)  
                               [CareVoyant, Inc. Quote Pricing Pages.pdf](#)  
                               [CareVoyant, Inc. Vendor Ethic Disclosure Statement.pdf](#)

<b>RESULT:</b>	NO ACTION REQUIRED
<b>MOVER:</b>	Cynthia Cronin Cahill
<b>SECONDER:</b>	Patty Gustin

### 7.C. [24-0847](#)

Recommendation for the approval of a contract purchase order to Redsail Technologies, LLC, for software and software maintenance for the data system in the Pharmacy Department, for the period May 1, 2024 through April 30, 2025, for a total contract amount not to exceed \$17,000; per 55 ILCS 5/5-1022 "Competitive Bids" (D) IT/Telecom purchases under \$35,000.



**Attachments:** [Redsail Technologies, LLC Comprehensive Checklist.pdf](#)  
[Redsail Technologies, LLC Pricing Pages FY24.pdf](#)  
[Redsail Technologies, LLC Vendor Ethic Disclosure Statement.pdf](#)

<b>RESULT:</b>	NO ACTION REQUIRED
<b>MOVER:</b>	Cynthia Cronin Cahill
<b>SECONDER:</b>	Patty Gustin

7.D. [24-0803](#)

Recommendation for the approval of a contract purchase order to Harris Govern, for annual software maintenance and support services, as needed, for the period of April 1, 2024 through March 31, 2025, for Building & Zoning (\$10,702), Division of Transportation (\$6,421), and Public Works (\$2,140), for a contract total amount not to exceed \$19,263. Per 55 ILCS 5/5-1022 (c) not suitable for competitive bids. (Sole Source - Support for Govern System.)

**Attachments:** [Harris - PRCC](#)  
[Govern Inv #GOVMN0000247.PDF](#)  
[Harris - Sole Source Letter](#)  
[Harris - Vendor Ethics](#)

<b>RESULT:</b>	ACCEPTED AND PLACED ON FILE
<b>MOVER:</b>	Cynthia Cronin Cahill
<b>SECONDER:</b>	Patty Gustin

**8. OLD BUSINESS**

No old business was discussed.

**9. NEW BUSINESS**

Mr. McPhearson presented on the domain seizure project, as attached hereto. Member Rutledge asked what will stop these entities from setting up more websites, to which Mr. McPhearson said unfortunately nothing, as it is difficult to know if these sites are legitimate or not. Member DeSart asked how they find and contact their victims. Mr. McPhearson said they usually find their victims through social media sites such as Facebook and Instagram. Member Rutledge asked if we can do a PSA to draw attention to this sort of scam. Member Henry noted that the County recently held a seminar, primarily for seniors, to educate and address these types of scams. Mr. McPhearson said yes, we can since the project is completed. Member Gustin asked if there is any kind of legislative action being taken to protect people on social media platforms. Mr. McPhearson said he is unaware of anything, but this is a big problem globally, and we can always look into it. Chair Yoo said we may want to consider doing a press release about this project. Mr. McPhearson said he would reach out to PIO Joan Olson and her team about it.

Mr. McPhearson said the GIS division is always working on new applications to help our citizens and staff. He said GIS Manager Tom Ricker and his team created two new applications with a lot of great GIS data. Mr. Ricker shared the two applications, the first of which is general census demographics and the second of which is for WorkNet staff, which is employment demographic data. He presented an overview of each. Member Rutledge asked if both applications are available to the public. Mr. Ricker said the general census application is available but the one for WorkNet is not currently public due to lack of ESRI credits. Member Johnson (Kaczmarek) asked what the credits are and how much they cost. Mr. Ricker explained that credits are shared for internal and external use, adding that staff would need to analyze how many hits we receive for each and calculate the costs.

Member Galassi praised Mr. McPhearson and IT staff for their cybersecurity training program, nothing that she was sent a fake email and was wise enough to forward it to IT for review. Mr. McPhearson encouraged everyone to use the "Phish Alert" button in Outlook so IT can keep up with statistics and tracking, which helps them determine if more training or security is needed. Member Carrier asked what the ratio is of legitimate email vs. scams. Network Systems Manager Joe Hamlin responded we receive millions of emails daily, 99% or so of which are scams. Mr. McPhearson said scam emails are a mixture of true scams and unsolicited sales. Mr. Hamlin said because IT screens them, the majority will never hit an inbox. Member White said you may need to enable the Phish Alert option. Mr. Hamlin said if it goes unused for a period of time, Outlook may disable the button, but you can easily re-enable it.

9.A. [24-0941](#)

Domain Seizure Project

**Attachments:** [Domain Seizure Project Tech Committee\\_03-05-24](#)

<b>RESULT:</b> PRESENTED
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## 10. ADJOURNMENT

With no further business, the meeting was adjourned.



# Minutes

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
[www.dupagecounty.gov](http://www.dupagecounty.gov)

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**File #:** 24-0684

**Agenda Date:** 2/20/2024

**Agenda #:** 5.A.

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# DU PAGE COUNTY

## Technology Committee

### Final Summary

421 N. COUNTY FARM ROAD  
WHEATON, IL 60187  
www.dupagecounty.gov

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**Tuesday, February 6, 2024**

**11:00 AM**

**Room 3500B**

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**1. CALL TO ORDER**

11:00 AM meeting was called to order by Chair Yeena Yoo at 11:00 AM.

**2. ROLL CALL**

<b>PRESENT</b>	Berlin, Cronin Cahill, Carrier, Eckhoff, Galassi, Gustin, Henry, Kaczmarek, Rutledge, White, and Yoo
<b>ABSENT</b>	Mendrick

**3. CHAIRWOMAN'S REMARKS - CHAIR YOO**

Chair Yoo applauded the Senior Scam workshop that took place on January 31st. She thanked Recorder Carrier, Treasurer Henry, the State's Attorney's office, the Sheriff's Office, and Michelle Amanti from IT for their presentations.

Next, Chair Yoo stated that she is working with the DuPage Mayors & Managers Conference to gauge interest in holding a bi-annual technology roundtable, specifically for the municipalities who do not have a robust IT department.

Lastly, Chair Yoo introduced Michael Brdlik, the new IT Project Manager. She also stated that the list of Deputy CIO candidates has been narrowed down and Mr. McPhearson would be holding second round interviews soon. Mr. McPhearson said he hopes to make an offer by the end of this month.

**4. PUBLIC COMMENT**

No public comments were offered.

**5. APPROVAL OF MINUTES**

5.A. [24-0546](#)

Approval of Minutes for the Technology Committee - Regular Meeting - Tuesday, January 16, 2024

**Attachments:** [2024-01-16 Technology Minutes](#)

<b>RESULT:</b>	APPROVED
<b>MOVER:</b>	Gwen Henry
<b>SECONDER:</b>	Patty Gustin

**6. BUDGET TRANSFERS**

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6.A. [24-0547](#)

Transfer of funds from 1100-2900-53828 (Contingencies) to 1100-2900-51040 (Employee Med & Hosp Insurance), in the amount of \$29,057, to cover GIS employee costs for FY2023.

**Attachments:** [\\$29,057.00 \(GIS - Employee Med & Hospital Insurance FY23\)\\_signed\\_Redacted.pdf](#)

<b>RESULT:</b>	APPROVED
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Sheila Rutledge

6.B. [24-0548](#)

Transfer of funds from 1000-1110-50099 (New Program Requests-Personnel) to the following: \$850 to 1000-1110-50010 (Overtime) and \$4,700 to 1000-1110-50050 (Temporary Salaries), for a total transfer amount of \$5,550, to cover overtime and temporary salary costs for FY2023.

**Attachments:** [\\$5,550.00 \(IT - OT & Temp Salary Costs FY23\)](#)

<b>RESULT:</b>	APPROVED
<b>MOVER:</b>	Sheila Rutledge
<b>SECONDER:</b>	Patty Gustin

## 7. INTERGOVERNMENTAL AGREEMENTS

7.A. [TE-R-0003-24](#)

Correction of a Scrivener's Error in Resolution TE-R-0002-24 (Information Technology - GIS Division)

<b>RESULT:</b>	APPROVED AT COMMITTEE
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Kari Galassi

## 8. PROCUREMENT REQUISITIONS

8.A. [TE-P-0003-24](#)

Recommendation for the approval of a contract purchase order to Carahsoft Technology Corporation, for the procurement of Workiva Audit Management Software, for the County Auditor, for the period of March 1, 2024 through February 28, 2025, for a contract total not to exceed \$42,437.99. Contract pursuant to the Intergovernmental Cooperation Act (NASPO Master Contract #AR2472).

Auditor White said his office currently maintains paper files, so everything is printed and filed in file cabinets. He said it is labor intensive. He said this software will automate their internal processes, including their reporting and retention. He said the templates they use will be in the software. He said private sector auditors have been using this software for twenty years.

**Attachments:**     [Carahsoft \(Workiva\) - PRCC](#)  
                               [Carahsoft \(Workiva\) - Quote #42127053](#)  
                               [Carahsoft \(Workiva\) - SOW](#)  
                               [Carahsoft \(Workiva\) - NASPO - Master Agreement #AR2472](#)  
                               [Carahsoft \(Workiva\) - VED](#)

<b>RESULT:</b>	APPROVED AND SENT TO FINANCE
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Bill White

8.B.     [TE-P-0004-24](#)

Recommendation for the approval of a contract purchase order to BMC Software, Inc., for annual software licensing and maintenance for MainView zEnterprise Automation and VSAM file management software, for Information Technology, for the period of March 1, 2024 through February 28, 2025, for a total contract amount of \$46,481.97; per 55 ILCS 5/5-1022(c) not suitable for competitive bids. (Sole Source - BMC is the owner of the proprietary source code for this software.)

**Attachments:**     [BMC - PRCC](#)  
                               [BMC - Quote # 00760863.0](#)  
                               [BMC - Sole Source Letter](#)  
                               [BMC - VED](#)

<b>RESULT:</b>	APPROVED AND SENT TO FINANCE
<b>MOVER:</b>	Sheila Rutledge
<b>SECONDER:</b>	Patty Gustin

8.C.     [24-0549](#)

Recommendation for the approval of a contract purchase order to Luminex Software, Inc., for maintenance of the virtual tape server, for Information Technology, for the period of April 1, 2024 through March 31, 2025, for a total contract amount of \$24,310.13; per 55 ILCS 5/5-1022(c) not suitable for competitive bids. (Sole Source - this is proprietary hardware and software; service and maintenance is offered exclusively through Luminex.)

Mr. McPhearson said this Luminex software allows us to backup our data on the mainframe. He said the vendor did not want to continue supporting our current system

because it is old, but rather they wanted us to purchase a new tape system, which is, at a minimum, \$50,000. He said Operations Manager Shanita Thompson negotiated with Luminex to extend their support one more year until we can get off the mainframe.

Mr. McPhearson said we have a plan to move all applications off the mainframe except for one that the Sheriff uses. He said their office is in the process of identifying a replacement solution. He said if they are not able to find one, we may need to extend support another year.

**Attachments:**     [Luminex - PRCC](#)  
                           [Luminex - Quote #DUP020124](#)  
                           [Luminex - Sole Source Letter 2024.pdf](#)  
                           [Luminex - VED](#)

<b>RESULT:</b>	APPROVED
<b>MOVER:</b>	Sheila Rutledge
<b>SECONDER:</b>	Patty Gustin

8.D.     [24-0550](#)

Information Technology - CDW Government 4216-1-SERV - This Purchase Order is decreasing in the amount of \$971,210.96, and closing due to the contract expiring.

Member Rutledge asked what this purchase order was for. Mr. McPhearson explained it was for Microsoft licenses; however, CDW lost the State contract to Dell, so staff cancelled the CDW purchase order and opened a new one with Dell. He said IT funds were shifted from one PO to the other.

**Attachments:**     [CDW - 4216-0001-SERV - Change Order #3](#)

<b>RESULT:</b>	APPROVED
<b>MOVER:</b>	Patty Gustin
<b>SECONDER:</b>	Kathleen Carrier

9.     **OLD BUSINESS**

No old business was discussed.

10.    **NEW BUSINESS**

No new business was discussed.

11.    **ADJOURNMENT**

With no further business, the meeting was adjourned.



# Technology Requisition \$30,000 and Over

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
www.dupagecounty.gov

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**File #:** TE-P-0006-24

**Agenda Date:** 3/5/2024

**Agenda #:** 19.A.

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AWARDING RESOLUTION ISSUED TO  
TOSHIBA BUSINESS SOLUTIONS  
TO PROVIDE MULTI-FUNCTIONAL DIGITAL COPIERS AND PRINTERS  
FOR VARIOUS DEPARTMENTS AND LOCATIONS  
(CONTRACT TOTAL AMOUNT NOT TO EXCEED \$1,500,000.00)

WHEREAS, bids have been taken and processed in accordance with County Board policy; and

WHEREAS, the Technology Committee recommends County Board approval for the issuance of a contract to Toshiba Business Solutions, to provide multi-functional digital copiers and printers, for the period of April 1, 2024 through March 31, 2029, for various departments and locations.

NOW, THEREFORE BE IT RESOLVED, that said contract is to provide multi-functional digital copiers and printers, for the period of April 1, 2024 through March 31, 2029 for various departments and locations, be, and it is hereby approved for issuance of a contract by the Procurement Division to Toshiba Business Solutions, 25530 Commercentre Drive, Lake Forest, CA 92630, for a contract total amount not to exceed \$1,500,000.00, per lowest responsible bid #24-019-IT.

Enacted and approved this 12th day of March, 2024 at Wheaton, Illinois.

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DEBORAH A. CONROY, CHAIR  
DU PAGE COUNTY BOARD

Attest: \_\_\_\_\_

JEAN KACZMAREK, COUNTY CLERK





Procurement Review Comprehensive Checklist  
 Procurement Services Division  
 This form must accompany all Purchase Order Requisitions

<b>SECTION 1: DESCRIPTION</b>			
<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#: 24-0808	RFP, BID, QUOTE OR RENEWAL #: 24-019-IT	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$1,500,000.00
COMMITTEE: TECHNOLOGY	TARGET COMMITTEE DATE: 03/05/2024	PROMPT FOR RENEWAL: 6 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$1,500,000.00
	CURRENT TERM TOTAL COST: \$1,500,000.00	MAX LENGTH WITH ALL RENEWALS: FIVE YEARS*	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Toshiba Business Solutions, a division of Toshiba America Business Solutions, Inc	VENDOR #: 14171	DEPT: Information Technology	DEPT CONTACT NAME: Shanita Thompson
VENDOR CONTACT: Frank Colucci	VENDOR CONTACT PHONE: 800-866-4361	DEPT CONTACT PHONE #: 630-407-5023	DEPT CONTACT EMAIL: Shanita.Thompson@dupagecounty.gov
VENDOR CONTACT EMAIL: frank.colucci@tbs.toshiba.com	VENDOR WEBSITE: toshiba.com	DEPT REQ #:	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). To furnish and deliver Multi-Functional Digital (“MFD”) Copiers and Printers to various Departments and Locations in accordance with the Request for Proposal Specifications for a five (5) year term from April 1, 2024, through March 31, 2029, not to exceed \$1,500,000.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished Multifunctional devices (MFDs) combine several functions—such as copying, printing, scanning, and faxing—into a single machine. Organizations can reduce costs associated with purchasing and maintaining separate devices. This consolidation not only saves money on initial procurement but also streamlines ongoing maintenance and supplies management.			

<b>SECTION 2: DECISION MEMO REQUIREMENTS</b>	
DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required.
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.
RFP (REQUEST FOR PROPOSAL)	

<b>SECTION 3: DECISION MEMO</b>	
STRATEGIC IMPACT	Select an item from the following dropdown menu of County’s strategic priorities that this action will most impact. FINANCIAL PLANNING
SOURCE SELECTION	Describe method used to select source. Competitively sourced via RFP # 24-019-IT.
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action). 1.) Approve RFP and allow for county-wide contract per competitively sourced RFP # 24-019-IT. 2.) Do nothing and let current contract expire.

### SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

<b>JUSTIFICATION</b>	Select an item from the following dropdown menu to justify why this is a sole source procurement.
<b>NECESSITY AND UNIQUE FEATURES</b>	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
<b>MARKET TESTING</b>	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
<b>AVAILABILITY</b>	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

### SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: Toshiba Business Solutions, a division of Toshiba America Business Solutions, Inc	Vendor#: 14171	Dept: Information Technology	Division:
Attn: Frank Colucci	Email: frank.colucci@tbs.toshiba.com	Attn: Sarah Godzicki	Email: Sarah.Godzicki@dupagecounty.gov
Address: 25530 Commercentre Drive	City: Lake Forest	Address: 421 N. County Farm Road	City: Wheaton
State: CA	Zip: 92630	State: IL	Zip: 60187
Phone: 800-866-4361	Fax: 949-462-2557	Phone: 630-407-5037	Fax: 630-407-5001
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: SAME AS ABOVE	Vendor#:	Dept: Information Technology	Division:
Attn:	Email:	Attn: Shanita Thompson	Email: Shanita.Thompson@dupagecounty.gov
Address:	City:	Address: 421 N. County Farm Road	City: Wheaton
State:	Zip:	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5023	Fax:
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Apr 1, 2024	Contract End Date (PO25): Mar 31, 2029
Contract Administrator (PO25): Shanita Thompson			

**Purchase Requisition Line Details**

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/Activity Code	Unit Price	Extension
1	1	EA		Leasing of Multi-Functional Copiers & Printers, per bid #24-019-IT - FY24	FY24	1000	1110	53410		200,000.00	200,000.00
2	1	EA		Leasing of Multi-Functional Copiers & Printers, per bid #24-019-IT - FY25	FY25	1000	1110	53410		300,000.00	300,000.00
3	1	EA		Leasing of Multi-Functional Copiers & Printers, per bid #24-019-IT - FY26	FY26	1000	1110	53410		300,000.00	300,000.00
4	1	EA		Leasing of Multi-Functional Copiers & Printers, per bid #24-019-IT - FY27	FY27	1000	1110	53410		300,000.00	300,000.00
5	1	EA		Leasing of Multi-Functional Copiers & Printers, per bid #24-019-IT - FY28	FY28	1000	1110	53410		300,000.00	300,000.00
6	1	EA		Leasing of Multi-Functional Copiers & Printers, per bid #24-019-IT - FY29	FY29	1000	1110	53410		100,000.00	100,000.00
<b><i>FY is required, assure the correct FY is selected.</i></b>										Requisition Total	\$ 1,500,000.00

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Please send correspondences to Sarah Godzicki and Shanita Thompson.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached:  W-9  Vendor Ethics Disclosure Statement



THE COUNTY OF DUPAGE  
 FINANCE - PROCUREMENT  
 LEASING OF MULTI-FUNCTIONAL COPIERS & PRINTERS 24-019-IT  
 BID TABULATION

√

Criteria	Available Points	Canon USA	genesisONE	Image Tech	Toshiba
Firm Qualifications	20	19.54	19.00	10.15	<b>19.54</b>
Key Qualifications	30	25.62	27.54	12.31	<b>25.54</b>
Project Understanding	30	25.54	28.46	10.77	<b>27.23</b>
Price	20	20.00	11.93	12.26	<b>18.84</b>
Total	100	90.69	86.93	45.49	<b>91.14</b>

Fee and Rate Proposal (Design Only)	\$ 266,036.40	\$ 445,882.20	\$ 434,027.88	<b>\$ 282,472.68</b>
Percentage of points	100%	60%	61%	<b>94%</b>
Points awarded (wtd against lowest price)	20.00	11.93	12.26	<b>18.84</b>

NOTES  
 1) Marco Technologies LLC has been deemed non-responsive due to not meeting the bid requirements.  
 2) Proven IT has been deemed non-responsive due to not meeting the bid requirements.

RFP Posted on 1/15/2024	
Bid Opened On 2/5/2024, 2:30 PM CST by	NE, VC
Invitations Sent	29
Total Requesting Documents	1
Total Bid Responses Received	6

# TOSHIBA



**Submitted By:**

Frank Colucci, Senior Account Executive  
Toshiba Business Solutions  
1130 W. Lake Cook Road, Suite 250  
Buffalo Grove, IL 60089  
Phone: (224) 213-3930  
Email: frank.colucci@tbs.toshiba.com

## Technical Proposal

*Prepared For:*

# DuPage County

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**Leasing of Multi-Functional Copiers and Printers 24-019-IT**

**February 5, 2024**

**REDACTED COPY**



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## Cover Letter

**Corporate Office:**  
Toshiba America Business Solutions, Inc.  
25530 Commercentre Drive  
Lake Forest, CA 92630

**Local Marketplace:**  
Toshiba Business Solutions  
1130 W. Lake Cook Road, Suite 250  
Buffalo Grove, IL 60089

February 5, 2024

Anthony McPhearson  
Chief Information Technology  
**DuPage County**  
Finance – Procurement, 3-400  
421 North County Farm Road  
Wheaton, IL 60187

**Re: Response to Leasing of Multi-Functional Copiers and Printers 24-019-IT**

Dear Anthony,

Toshiba Business Solutions, a division of Toshiba America Business Solutions, Inc., (TBS/Toshiba) is pleased to respond to the **DuPage County's RFP for Leasing of Multi-Functional Copiers and Printers 24-019-IT**, and we thank you for extending us this opportunity. This response incorporates a creative and competitive solution that will meet your printing needs and provide the best value to the County.

Toshiba's overall objective is to create a well-structured program that allows the County to leverage the newest technology products for enhanced productivity thereby supporting the County's objectives outlined in your RFP. Our full-featured multifunction devices are fast and productive, providing DuPage County with the capability and versatility to produce what you need, when you need it. Our local account team can transition your staff to the new technology quickly and seamlessly, and with the least administrative burden possible.

### Addenda

Toshiba acknowledges receipt of Addendum 1 on January 25, 2024.

### Brief Description of Firm

Headquartered in Lake Forest, CA, Toshiba America Business Solutions, Inc. delivers imaging and retail solutions and services that help our clients control productivity, communicate better with end-customers and increase efficiency. Toshiba is the leader in the digital imaging and business products industry. Our extensive client portfolio includes local, national and global clients from all industries such as distribution, retail, government, education, energy, healthcare, manufacturing, financial services and legal.

Toshiba serves over 60,000 customers globally and we have an established program dedicated to supporting clients in every sphere, including state and local government, education, healthcare, financial, manufacturing and logistics, industrial, retail, and legal vertical markets in the U.S. and abroad.

### Brief Background

Since 1875, we have been developing and pioneering multiple technologies within different industries and have a reputation for leveraging solutions to raise our products to the next level. When Tanaka

# TOSHIBA

Engineering Works merged with Tokyo Electric Company to form Toshiba Corporation in 1939, the resulting company became a leading pioneer of some of the world's most significant technologies. Toshiba is the brains and brawn behind more than 500 major technologies including digital imaging and document management products, telegraph machines, MRI technology, air traffic control systems, semiconductors, flat panel displays, disk drives, telephone systems, and laptop computers.

Toshiba has been manufacturing copiers since 1974; multifunctional products since 1997; printers since 2000; and providing Managed Print Services (MPS) since 2003. Our customer base represents a broad range of vertical markets including local and state government; higher education; K-12 schools; healthcare; retail; entertainment; manufacturing; financial; legal; transportation; and construction, including long-term relationships with major account clients both in the U.S. and abroad.

## Services Offered

We have been recognized consistently as a valued vendor partner for our clients, allowing them to develop strong, yet flexible programs that blend innovative solutions, quality products, expedient service and strong account management.

Toshiba is about much more than products. Toshiba has earned the reputation as a true MPS partner by working collaboratively with our clients to provide detailed assessments, fleet rightsizing, optimization and value-added services to reduce cost and reduce print. MPS has been the fastest growing portion of Toshiba's portfolio and an area where we excel. Our MPS model incorporates everything from assessments and fleet optimization, device and fleet management, document workflow efficiencies, and support for various product brands, all while addressing a corporate commitment to improve security and decrease paper consumption and power usage. The scalability of our offering allows us to meet the MPS needs of small, medium, and large customers anywhere in the world.

## In Closing

Throughout our proposal we have highlighted the many great benefits DuPage County will experience when partnering with Toshiba. We look forward to further demonstrating our strengths in print management and helping the County achieve its goals and objectives during this bid process. You will receive multifunction devices as well as solutions to help you improve workflows, better manage your print environment, reduce costs and improve productivity, all managed by our local team and certified field technical support. We would value your business and look forward to the opportunity to demonstrate our strengths in a comprehensive enterprise print management solution and to present our vision of how we can help DuPage County achieve your goals and objectives through the bid process.

On behalf of the entire Toshiba team, we look forward to re-establishing a long-standing partnership with DuPage County. Feel free to contact Frank at (224) 213-3930 or by email at [frank.colucci@tbs.toshiba.com](mailto:frank.colucci@tbs.toshiba.com) should you have any questions regarding this proposal.

Signature on File

›

Larry White  
President and CEO





## Firm Qualifications

Provide a statement that portrays the firm’s qualifications in relation to the Scope of Services. The response should include the following:

- a) A summary of the firm’s general qualifications including specific disciplines represented that are applicable to the proposed work, number of employees, office locations, etc.

### Qualifications

Toshiba is the leader in the digital imaging and business products industry. Our extensive client portfolio includes local, national and global clients from all industries such as distribution, logistics, retail, government, education, energy, healthcare, manufacturing, financial services and legal. Toshiba has a vast understanding of the education sector and what solutions would be most beneficial for our clients.

Our core business encompasses all areas of managed print services, security, environment, assessment, asset management, workflow solutions and fleet optimization as it pertains to your document life cycle. For these reasons described throughout this response, Toshiba is the vendor of choice to manage all aspects of your Print Services Program. We stand ready to deliver on this promise.

With Toshiba, you get a company who cares for the people, the environment, and future of the communities where we work and live. Locally in Buffalo Grove and headquartered in Lake Forest, CA, Toshiba America Business Solutions, Inc. delivers imaging and retail solutions and services that help our clients’ control productivity, communicate better with end-customers and increase profitability. Our proposal highlights Toshiba’s offerings and qualifications to best satisfy the RFP requirements and DuPage County’s expectations. We offer a breadth of business communications solutions with a single point of accountability, integrated technology solutions and proven cost savings that allow our clients to do more and print less, setting Toshiba apart as a world class services provider.

Management of the program will be centralized through a single point-of-accountability to ensure we deliver the highest level of service consistently for all County locations. All efforts will be supported by a complete corporate support organization, equipped to manage all account aspects – including initial contract activities, implementation, billing, and service.

In addition to full-time service staff, our customer support infrastructure includes vast corporate resources including IT specialists, technical advisors, marketing solutions engineers, specialists, and other critical disciplines. Customer support in the areas of operations, product marketing, IT, and billing are also available to facilitate contract operations.

We recognize DuPage County is looking for a vendor who can serve both your current and future needs by utilizing the latest technologies, security, and best practices while lowering your overall costs. Most importantly, you are seeking a true partner – someone that will engage with you to improve your entire document management environment, so you can focus on providing quality education for your students. Toshiba is confident that we can be your partner of choice and that our solutions will exceed all of your goals and expectations.

### Number of Employees

In Illinois alone, Toshiba has over 100 employees comprised of management, professional, technical and administrative staff who stand ready to serve its customers. Locally, in Buffalo Grove, there may be anywhere from 5 to 20 individuals involved on your account at any one time. Our core group will be



# TOSHIBA

comprised of the Executive and Account Management and Implementation teams, service technicians, Account Specialists and contract administration staff.

At a corporate level, Toshiba has 2,014 employees; parent company Toshiba TEC Corporation has over 20,000 employees.

## Local Presence

Partnering with Toshiba provides you with the benefit of a local company with national resources. Each DuPage County location will receive local attentive support delivering client-specific solutions with proven, effective, and efficient results. The program will be centralized through a single point-of-accountability to ensure we deliver the highest level of service consistently for all locations.

## Local Marketplace

Toshiba Business Solutions  
1130 W. Lake Cook Road, Suite 250  
Buffalo Grove, IL 60089

## Principal Place of Business

Toshiba America Business Solutions, Inc.  
25530 Commercentre Drive  
Lake Forest, CA 92630

b) An outline of the firm's depth and breadth to carry out the scope and the extent of the work required, especially that of the project lead.

## Project Approach

Toshiba Business Solutions is pleased to submit this proposal in response to the County and we are committed to deliver on your requirements, and more, to replace your current copiers with Toshiba's latest monochrome and color MFDs, as well as the two coin-op devices.

Toshiba is proposing our award-winning multifunction devices to replace your current copiers, as well as the two coin-op devices. All products being offered are newly introduced and boast some exciting new enhancements. Our proposal offers not only award-winning products, but also unmatched customer service and our most competitive pricing.

Conveniently located in Buffalo Grove, Illinois, (*only a 30-mile drive from DuPage County*) this contract will be managed by an experienced and results-driven Account Management Team comprised of local sales, service, technical, and administrative staff. **Senior Account Executive, Frank Colucci** will be the County's dedicated Account Manager to ensure a seamless transition to Toshiba products and ongoing responsive service and support.

Our Team will hit the ground running on day one. We will perform an inventory of all devices, as well as gather information on the workflow, user population, and print volume. This will help clarify how printers, multifunction devices, copiers, and scanners are being operated throughout your workspace. We seek to uncover common trouble spots such as redundant, underutilized, or outdated hardware; overly expensive color machines; user-to-device ratios; an overabundance of personal printers; and any workflow





# TOSHIBA

bottlenecks which are hindering your productivity. In addition, can conduct security assessments to identify and recommend remediation for security gaps at the device, access, and document levels.

## Assessment Plan

The most important decision for DuPage County is to select the right partner who can help you design the best print environment across all County locations and offices. It will not benefit the County to find the cheapest vendor. There is no tradeoff between shortcuts and the best total value. Toshiba is the only vendor that offers the extensive knowledge, experience, guidance and vendor agnostic approach that will help you realize your overall printing goals.

At the core of Toshiba's commitment to DuPage County is a program that continually drives print standardization and optimization, along with resulting cost reductions, over the life of the contract and beyond. While a customer often realizes significant cost savings upon initial implementation, we continue to look for areas of inefficiency and fleet optimization over time. Toshiba markets this program of fleet assessment, rightsizing, and ongoing optimization as our exclusive **Encompass™ X Fleet Analysis Program**.

## Encompass™ X Fleet Analysis Program

If selected to move to the next phase of this RFP, Toshiba would welcome the opportunity to perform an assessment of your print environments and provide our recommendations. Toshiba will offer recommendations to drive fleet optimization and improve operational efficiencies. Judging by the fleet makeup and volumes in the RFP, it is possible that your print environment is not ideal for your current situation. Ensuring you are equipped with the right number of secure, cost efficient and productive devices is a key component of our program for DuPage County. However, the savings can only truly be gauged once we have had the opportunity to examine your current fleet, device locations, business processes, copier applications, and end user requirements.



Using our proprietary Encompass Document Analysis Program, Toshiba Print Analysts can develop a total cost of ownership (TCO) model of your current print environment through quantitative and qualitative analysis of your print environment. This assessment will also give us the opportunity to examine the make, model, age, and condition of your printer fleet as this data was not available in the RFP. Along with the copier fleet, Toshiba can optimize your printer fleet through rightsizing to remove inefficient and non-productive printers and replace them with new, creating optimal workgroups and workflow solutions that promote your objectives.

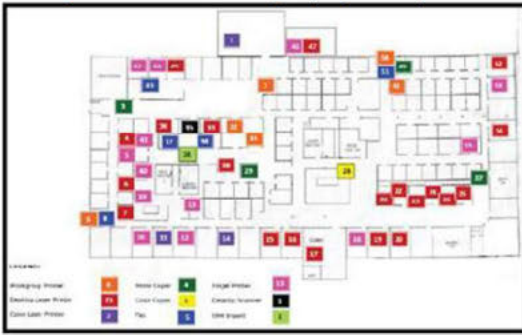
In conjunction with the device-based recommendations, Toshiba may recommend that software-based technologies be deployed to improve the overall efficiency and technology available to staff. This may include secure release print software, fax server solution, mobile printing, or the like. We would provide the necessary skilled staff to assist with implementation and training.

Examples of this mapping are included in the sample Encompass report on the following page.



# TOSHIBA

*Example: Current Design (Before Optimization)*



*Example Future Design (After Optimization)*



## Implementation

The rollout and deployment of Toshiba devices will be administered by a Toshiba Implementation and Transition Team comprised of experienced individuals who have participated in many successful deployments. As head of our Account Management Team, Frank Colucci will support every aspect of the implementation process, coordinate support, and facilitate the account review process. He will serve as the focal point for program management. Throughout the term of this agreement, the account management team will be supported by corporate-based service, IT, operations, contracts, product marketing and others who will drive their respective contract commitments.

To ensure the transition phase is fluid, members of our Executive Management Team, led by **Martin Schopp, Vice President and General Manager**, will oversee the client relationship, program and support County's objectives throughout the contract term to ensure little or no disruption to day-to-day business operations. They will monitor and measure the business relationship between the parties, establish direction and priorities, and act as a final decision board for escalated problems.

## Toshiba Hardware

Toshiba delivers an impressive selection of color and monochrome MFPs in small, medium, and large workgroups to meet the diverse printing requirements for County administrators. Toshiba's color A4 MFPs additions are especially ideal for the education market. Offering many of the desirable features of the company's larger counterparts, the company's recently introduced systems perform virtually any document management task for school personnel within a space-saving footprint.

Our newest lineup of full-featured color and monochrome multifunction products are designed to help customers operate more efficiently while improving workflow. A more powerful multi-core processor, exceptional color quality, customizable tablet-style user interface (UI), Embedded Application Platform and Dual-Scan Document Feeder highlight the product portfolio.



Out the box, Toshiba MFPs have the ability to scan to a Network Folder, static or variable based on the logged on user, to the logged on users email or to another email address via manual entry or LDAP integration, to a local folder on the Toshiba MFP hard drive, to a Windows Scan location, to a USB drive located on the front of the MFP. Most external applications have the ability to upload documents automatically from a "hot folder" location. We can program buttons on the Toshiba home screen to scan directly to that hot folder, based on user permissions, and style the button with the application's icon. To the end user, it appears as if the copier is directly connected with the external application.



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Toshiba's e-BRIDGE technology utilizes a high-performance print controller, enabling concurrent job processing for copying, printing, network scanning, and Internet faxing. The all-in-one architecture offers easy set-up and installation. The controller shares system resources, integrating CPU, Memory and hard disk functions to efficiently control multiple functions.



Toshiba's Open Platform connectors offer a high level of third-party application integration with all of Toshiba's Open Platform MFPs. Through these purchased connectors, Toshiba can integrate our MFPs with external applications and systems that include Microsoft SharePoint, Microsoft Exchange as well as cloud-based applications such as Microsoft Office 365, Google Docs and Google Apps. By storing data on the cloud, you can download data anytime, anywhere, including to and from mobile devices. This allows you to take your office with you wherever you go.

All multifunction devices are extremely user friendly, easy and convenient to operate and can be used safely and securely. For ease of use and to maintain the same positive user experience, each model performs print, copy, scan and fax the same way across the entire product family. The front panel interface is standardized across all product lines, allowing users once they learn one device to easily use other Toshiba models. This makes our products easy to learn and use, regardless of the model. Users only have to learn once and they are able to use any standard Toshiba model.

New Product Features	Benefits to DuPage County
<i>Next Generation e-BRIDGE Technology</i>	Next generation e-BRIDGE Technology (eBN) built on Linux enables 3 <sup>rd</sup> -party integration and support for internally driven solutions.
<i>Fast Processor, 4GB RAM &amp; 320GB SED</i>	Intel Atom™ E3825 1.33GHz (Dual Core) processor provides the power to crunch tough jobs and perform multi-tasking such as embedded OCR
<i>eFMS &amp; Cloud Connect</i>	e-BRIDGE Fleet Management Software and e-BRIDGE Cloud Connect minimizes downtime allowing IT and facilities managers to easily manage entire fleet of Toshiba and selected other devices
<i>New 10.1" Tablet-Style Full-Color Tilting Touch Screen Panel</i>	New Tablet Style Touch Swipe User Interface (U/I) is Section 508 Compliant, easy to read and intuitive to use. Same U/I across entire product line to allow for easy operation between models.
<i>"Print Around"</i>	Moves to next job in queue when current job requires toner or paper that has run out in MFP
<i>Saddle/Fold Capabilities</i>	Saddle-stitch finishing and ability to fold without stapling. Cascade finishing allows for double the capacity before needing to empty the saddle tray
<i>Server-less Multi-Station Printing</i>	Retrieve your print job from any available MFP via simple authentication without costly 3 <sup>rd</sup> -party solutions – Now supports up to 50 devices!

<b><i>Safe and Secure</i></b>	320GB Self-Encrypting Drive (SED) with Automatic Drive Invalidation (ADI) & Data Overwrite capability provides unparalleled level of security.
<b><i>Environmentally Friendly</i></b>	RoHS compliant, Recycled plastics, Low-Power (1W) Super Sleep Mode, e-BRIDGE Plus for Green front panel app. ecoSmart Recycling Program
<b><i>EPEAT Gold Certification</i></b>	EPEAT is the definitive global registry for greener electronics. It's designed to help purchasers choose products that reduce environmental impact
<b><i>Energy Star Tier 2*</i></b>	Product family meets the latest, most stringent requirement.
<b><i>Single Pass Dual Scan Document Feeder (Optional, 35ppm+ devices)</i></b>	Scans both sides of the page in a single pass, saving time and increasing productivity
<b><i>New High-Speed, High Capacity Dual Side Document Feeder (Optional, 35ppm+ devices)</i></b>	300-sheet DSDF provides 120 SPM simplex (70 SPM when copying) and 240 SPM duplex scan speed improve overall document processing time
<b><i>PCL 6, PS3, XPS Univ Drivers</i></b>	Connectivity to Windows, Macintosh & More – No Problem!
<b><i>Cloud Based App Support</i></b>	Scan-to or Print-from popular cloud-based apps like Google Drive, DropBox and more - right from the front panel - No PC required.
<b><i>Driver Plug-ins</i></b>	Driver Plug-ins improve productivity and increase functionality Job Point – Split large print jobs over multiple Toshiba MFPs (up to 10) Job Replicator – Multi-part form replacement (3 prints) Job Separator – Easily perform batch printing from any Windows app Job Build – Print different document types together as a set
<b><i>Mobile Printing Support</i></b>	Support for Apple AirPrint & Android mobile printing with advanced document control using e-BRIDGE Print & Capture application
<b><i>Embedded Optical Character Recognition (Optional)</i></b>	Simplifies the creation of searchable PDFs or editable document formats such as Microsoft Word
<b><i>Elevate Customized U/I (Optional)</i></b>	Unique approach simplifies menu structure, improving productivity and minimizing user errors for those with more specific task-oriented routines
<b><i>External Keyboard Support (Optional)</i></b>	Optional Accessory Tray allows the addition of an external keyboard for document workflow processes
<b><i>Card Reader Pocket (Optional)</i></b>	Enables Authentication Reader to reside inside MFP for a safe & clean look



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## Proposed Hardware

Toshiba's proposal under this RFP features competitive pricing for Toshiba's award-winning ENERGY STAR multifunction devices and services for a like-for-like replacement options for your current devices at all DuPage County locations. All of our proposed products meet or exceed the specifications and requirements for Walk-Up and Coin-op devices outlined in the RFP. Product brochures are included under the Product Literature tab of this proposal. Proposed hardware is also provided in Toshiba's Price Proposal.

## Fleet Management Tools

As a value-added benefit, Toshiba is offering DuPage County several fleet monitoring tools:

### e-BRIDGE® Global Print

Toshiba's **e-Bridge Global Print** provides users a simple and secure way of printing that can be done from anywhere in the workplace by simplifying a print job from wherever you work.



e-BRIDGE Global Print simplifies printing from wherever users work, allowing you to send print jobs directly to the cloud and then release when ready at the cloud-connected Toshiba MFPs of your choice. And, thanks to built-in security, the entire experience is worry-free.

#### ***e-Bridge Global Print provides:***

- Device authentication with the latest security standards
- Insights into device usage and printing trends
- Eliminate the need for on-premises print servers
- Document security with secure print release with user authentication
- Submit print jobs from Windows, Apple and Chrome OS devices

Using this solution, users may submit print jobs from their workstations, authenticate at an MFP, and release the print job at the panel. All the user activities at the panel are tracked for reporting purposes. No servers or on-premises installations are required.

Toshiba's e-BRIDGE Global Print gives you and your employees the flexibility to print from a home office, client's office, coffee shop, or from anywhere, really. Once users simply install the universal print driver onto their computer, they can send print jobs from virtually anywhere, and from any network.

With e-BRIDGE Global Print, you can easily sign in from your Google Workspace™ or Microsoft 365® accounts to quickly enable printing. All documents are securely transmitted to and from the cloud hosted by Microsoft® Azure® and Amazon Web Services™ (AWS). And we've also simplified secure authentication by allowing users to log into our multifunction printers using a dedicated PIN, or access card or badge. It's your choice and best of all, little to no training is required.

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## Elevate Sky

Toshiba's Elevate Sky™ platform features a broad portfolio of Toshiba and third-party cloud-enabled systems, software and services including print, document and printer fleet management, workflow and beyond.



Together, these allow users to manage devices and content entirely in the cloud. While Toshiba has utilized cloud technology across its portfolio for years, the company's Elevate Sky platform aligns such capabilities within one platform to make the transition to cloud easier and more successful for end users. It also enables seamless connectivity from on-premises hardware to the cloud for easy and secure interactions between physical documents and digital workflows.

Elevate Sky achieves a superior cloud customer experience through the following:

- **Cloud-enabled systems:** Toshiba multifunction printers dramatically enhance productivity by enabling workforces to share documents seamlessly and securely via cloud providers such as Google, Microsoft, Box and Dropbox.
- **Cloud-ready software:** From output management to document management and workflow solutions, Toshiba helps companies transform physical documents into digital cloud-based workflows to any location or device, 24/7 through the cloud.
- **Cloud-based management:** Elevate Sky's cloud-based fleet tools allow businesses to centrally facilitate print and document environments – regardless of location.

Toshiba moreover simplifies the transition to cloud print and document environments via its Cloud Print Optimization Study service offering, which integrates decades of implementation insight with continuous delivery and deployment practices.

With the goal of streamlining the entire print-to-digital cloud journey through a single platform, Toshiba will simplify the management of print and document environments for organizations of all sizes.

## e-BRIDGE Fleet Management System (eFMS)

Toshiba's eFMS is a no-cost software solution providing customers complete centralized monitoring, management, and administration of their networked Toshiba's MFPs. Key features include:

- Instantly gather information from networked systems throughout your company.
- Monitor meter defined grouped devices by model, cost center, department, or location (machine availability, as well as toner and paper supply status).
- View detailed device data including errors, consumables levels, status alerts, and current usage and history.
- Develop customized reports covering groups of devices which can be defined as templates.
- Configure multiple MFPs at the same time (address books, templates, network configuration).

Administrators using eFMS can monitor all networked Toshiba MFPs through one common, intuitive user interface. They also can receive status reports on jams or service issues and other device information updates via pop-up or e-mail. In the case of more severe technical difficulties where service is required, an email notification can be directly sent to the service provider to speed response times and increase machine availability and user productivity. Administrators may also deploy and manage device settings and configurations, all directly from the desktop.



# TOSHIBA

## e-BRIDGE Remote Diagnostic Tool (eRDT)

Toshiba's Remote Diagnostics Tool (eRDT) enables service technicians to access their customer's fleet via a mobile or desktop device while taking any necessary proactive steps based on the recommendation. For example, eRDT could predict that a specific part (say fuser or roller) on certain devices on the fleet may fail by a specific date in the future.

### Such predictions occur by:

1. Monitoring error trends on the device over time.
2. Analyzing large volumes of data from similar devices in the field.
3. Monitoring the maintenance cycle of parts.
4. Monitoring the usage pattern of the MFD by the customer.

When such predictions occur with high probability, the prediction is reviewed, and a call is placed along with related parts for faster resolution. Dealers may utilize these predictions to optimize service calls. Combining multiple service calls into a single dispatch also reduces resellers' service costs. More importantly, resellers may proactively resolve customer issues before they occur, thus improving customer service substantially.

## Cloud Based Diagnostics

Toshiba's technical staff can, with the County's approval, utilize our exclusive e-BRIDGE CloudConnect (eCC), a cloud-based application to remotely update firmware, push down service codes and find error history within Toshiba products to help with diagnostics and the proactive maintenance of your fleet. Via the cloud, we can collect operation data securely and reliably from your MFPs for remote diagnostics and troubleshooting purposes.

e-BRIDGE CloudConnect works behind the scenes for you in managing your devices remotely by gathering information about your machine via the cloud. That means you can spend less time managing your devices and free up your resources with remote meter reads, firmware updates, and toner alerts to trigger automatic supplies deliveries. It is easy to set up too, with no software installation required—it is simply installed as a firmware update.

e-BRIDGE CloudConnect only handles data concerning billing and maintenance such as information on counter data (the number of sheets used, etc.), device failures, consumables replacements, and device settings and adjustments. This data is totally isolated from documents such as copies, faxes, and scans.

eCC uses the same principles used by client PCs accessing secure data over a browser with HTTPS (server authentication and encryption). Data can only be sent from MFPs, and access is limited to eCC servers with valid authentication certificates. To prevent server spoofing and to make sure data is transmitted to the correct server, eCC features a server authentication functionality that confirms whether the server to be accessed is the actual server that has been specified. All transmitted and received data is encrypted to preserve confidentiality and safety and to protect against stealing, leaking and tampering.

eCC enables our service staff to provide better service in the following areas:

### Increased Uptime

- Real-time alerts go to the service technician to update the status of MFPs.
- Service technicians can set policies that adjust internal MFP codes to control copy, scan, and other configuration settings.

# TOSHIBA

- Using the data sent from the MFPs, service staff will be better prepared for onsite service calls with correct parts and action plans for faster resolution.

## Reduced Customer Workload

- MFP alerts are sent directly to the technician, helping reduce your IT burden.
- Meter data updated daily is automatically transferred to various back-end systems.
- Toner alerts can be monitored to provide automated supplies delivery.

## Keeping Toshiba MFPs Up to date

- Firmware can be updated automatically, or purposely maintained and monitored at a customer designated level. Updates can be scheduled for off-peak hours.
- Remote Data Backup and Restore.
- MFP configuration data/templates/settings/contacts can be maintained, stored, restored from the CloudConnect server.

## FM Audit

FMAudit, an integrated software platform, is a data collection agent (DCA) for reporting across the fleet regardless of make, model or manufacturer. Information is captured by MIB via SNMP. It collects information related to meter reads, device alerts consumable levels, etc. across the entire fleet.

FMAudit can identify fields such as manufacturer, model, serial number, and IP address of each system. FMAudit will also capture meters; totals as well as monochrome and color meters. This will also be a tool used to track toner levels. FMAudit captures all this information regardless of the type of system or manufacturer of each system.

## TopAccess

At the device level, Toshiba's browser-based software, TopAccess, resides on each MFP controller. TopAccess is a web-based job and device management tool developed and owned by Toshiba that allows users to monitor all jobs, control their own current jobs and confirm the status of the system. TopAccess also allows network administrators to configure the device for their specific network environment and establish the parameters to suit their facility's needs. The only requirement is that the user has Internet browser software, i.e., Internet Explorer or Chrome. TopAccess enables us to:

- ✓ Remotely change the configuration of some or all networked devices quickly.
- ✓ Provide automated alerts to the service team.
- ✓ Enable remote diagnosis which facilitates proactive service resolution.
- ✓ Provide automated volume statistics which will feed into quarterly reports.



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## HIPAA

Our offered hardware and document solutions streamline common healthcare workflow applications and help ensure compliance with government regulations including HIPAA (the Health Insurance Portability and Accountability Act). Our security protocols and proprietary self-encrypting hard drives with wipe technology to safeguard personally identifiable information (PII) and protected healthcare information (PHI).

### Hard Disk Drive Security

Toshiba recognizes that security is a growing concern for companies of all sizes; therefore, we employ innovative methods to protect valuable data.

Each Toshiba MFP comes standard with Self-Encrypting Drive (SED) Technology using Toshiba's proprietary Wipe Technology which allows sensitive user data to be securely erased when a system is powered down or when a SED Hard Disk Drive (HDD) is removed. The SED encrypts all data on the HDD using an Advanced Encryption Standard (AES) 256-bit algorithm. Therefore, even if the HDD is stolen and installed in another product and an attempt is made to read data from the HDD, data invalidation works to prevent information leaks. When an MFP is at the end of its lease or removed from company premises, data can be instantly invalidated by the service technician.



Toshiba's Data Overwrite Kit, also standard on Toshiba products, overwrites the HDD from one to five times at the end of each copy, print, scan, or facsimile job or at regular time intervals to prevent storage of private or confidential data. This overwrite process meets the standards established by the U.S. Department of Defense 5220.22M. These outstanding security features have earned Toshiba's latest e-STUDIO line an exceptional Common Criteria Evaluation Assurance Level rating of three (EAL3).

### Secure MFP

For the products and services being offered to DuPage County, Toshiba has developed a comprehensive portfolio of security countermeasures, which we brand as *Secure MFP*.

The security measures fall into four categories:

#### I. Device Security

Device security focuses on the built-in securities in the device hardware, controller and software. Toshiba not only protects the MFP at every layer of the technology stack, but we also ensure that our MFPs are secure during the entire device lifecycle from installation to operation to end-of-life (EOL).





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Toshiba's e-BRIDGE Open Platform provides an Embedded Web Browser (EWB) and Web Service interface for the development of web apps for Toshiba MFPs. These interfaces work in conjunction with all the built-in security features on the MFP itself, allowing application developers to ensure the security and confidentiality of their data. Toshiba's Embedded Web Browser uses the Apple® WebKit rendering engine for web applications developed on the e-BRIDGE platform. All the standard security applicable to web applications applies to the MFP Embedded Web Browser as well.

Toshiba MFPs use a hardened Linux operating system that is widely used in mission-critical systems across the globe. By using the highly secure and reliable Linux system controller, we ensure that Toshiba MFPs are not affected by network malware, ransomware or viruses targeted for Windows systems or other embedded systems, which have been the target of recent attacks on devices of other manufacturers. Viruses like MSBLAST, WannaCry, and others are unable to reach our MFPs as a result. In addition to the platform being secure by design, each version of the controller goes through a formal assessment by security experts before they are released.

All Toshiba MFPs are equipped with self-encrypting HDD with Wipe function which ensures that the data stored on the HDD are encrypted with an AES 256-bit algorithm. Therefore, even if the HDD is stolen or removed from the Toshiba MFP, the data is invalidated immediately to avoid any information leakage.

The Data Overwrite feature on Toshiba MFPs allows data that is temporarily stored on the HDD from copying, printing, scanning or faxing operations to be automatically overwritten and erased by a Department of Defense (DoD) standards-compliant method once they're completed. This Data Overwrite feature also has the function of completely erasing the data in all HDD areas. On Toshiba MFPs, evidence of the overwriting appears on the front panel as "Erasing Data" immediately after the device is done with any temporary data gathered during the copying, printing, scanning or faxing process.

Toshiba also offers a FIPS 140-2 Validated HDD specifically for those government agencies and private sector businesses where data protection is of utmost importance. FIPS 140-2 is designed to address the encryption and tamper resistance of an HDD. . Under certain regulations, U.S. federal agencies must use FIPS-140 certified systems to meet security requirements in order to protect sensitive information in computers, telecommunication systems and other IT-related products, such as MFPs).

## II. Access Security

Access security ensures that the right people have access to the right features, functionality and data on the print device. Any intrusion is proactively monitored and managed. To enforce this, Toshiba MFPs restrict physical access in the following ways:

User Authentication may be enabled on Toshiba MFPs to prevent unauthorized access to MFP functions. The user authentication feature allows an administrator to restrict operations on the touch panel, including restricting access to MFP configurations or log information, restricting available operations such as copying, printing, scanning or faxing to users, managing the meter counter on a per-user basis and setting user authentication requirements for each function.

Several authentication methods are supported on Toshiba MFPs:

- Department code authentication
- User ID/password authentication
- PIN authentication
- Badge authentication
- Two-factor authentication, using badge and PIN
- NFC (Near-Field-Communication) authentication



Password Policies may be set so that the user password is required to have the following attributes:

- Minimum password length
- Password validity period
- Prohibited character strings in a password
- Account lockout caused by login failure

**USB Port Disable:** As an additional security measure, the USB ports on Toshiba MFPs may be completely disabled so that those ports cannot be used for intrusion attacks. Even if these ports are open, they are already equipped with protection from malware or harmful scripts.

**Digital Access Security:** In addition to managing physical access to the device, Toshiba MFPs also have numerous built-in features to protect themselves from unauthorized digital access.

**IP/MAC Address Filtering:** All Toshiba MFPs support IP/MAC address filtering so that access requests from only a specific network node(s) or a client PC(s) are accepted. Also, certain network devices or segments may be restricted access. This helps ensure that the MFP is accessed from authorized network equipment only. This restriction applies to both IP and MAC addresses. Additionally, the MFP may be configured for port filtering so that only certain ports stay open in the MFP, and an administrator can configure the MFP to respond or reject ICMP requests.

**Transport Layer Security (TLS):** Toshiba MFPs may be configured to allow all communication over secure TLS1.2 protocol, with older, less secure SSL protocols (SSL3.0/TLS1.0) no longer supported. TLS1.2 communication is much more secure than its predecessors because it allows the use of more secure algorithms and advanced cipher suites. TLS 1.2 is the de-facto security standard currently used in HTTP Server/Client, IPP, LDAP, SMTP Client, POP3, FTP Server, Web Service Print, FTP Client, Web Services Scan, Syslog and SOAP.

**IP Layer Security:** Toshiba MFPs support IPV6 with IP Security Protocol (IPsec) which protects data communication in the IP layer, ensuring that both the sender and the receiver are authenticated, and the integrity, as well as the authenticity of the data, is protected in order to secure confidentiality and entirety.

As per IPsec standard, Toshiba MFPs support both AH (Authentication Header) and ESP (Encapsulating Security Payload) security protocols. AH secures the entirety of the IP packet, and ESP secures the confidentiality and entirety. For key management protocol together with IPsec, both IKEv1 and IKEv2 are also supported. Security certificates may be imported manually or automatically via Simple Certificate Enrollment Protocol (SCEP).

**Network Authentication:** Toshiba MFPs support several network authentication schemes:

- IEEE802.1X is standard for network authentication utilized in Toshiba MFPs.
- LDAP/AD authentication supports CRAM-MD5, Digest-MD5 and Kerberos to protect the username and password required for access to an LDAP/AD server.
- SMTP authentication supports CRAM-MD5, Digest-MD5, Kerberos and NTLM to protect the username and password required for access to an SMTP server.
- POP3 authentication supports Kerberos, NTLM (SPA: Secure Password Authentication) and APOP to protect the username and password required for access to a POP3 server.
- SMB authentication supports NTLMv2 and Kerberos.
- Dynamic DNS supports Secure Dynamic DNS. When Secure Dynamic DNS is used, only the MFP in which the resource record has been registered or device with management authority for a DNS server can update zone information.



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- SNMP supports SNMP authentication, enabling authentication of an SNMP session between the MFP and an SNMP server.
- Toshiba MFPs also support SNMPv3, which has both a data encryption and a user authentication function to enhance security features.

**Wireless Security:** To prevent unauthorized usage by a third party, such as a falsification of data and spoofing over Wi-Fi, Toshiba's MFP wireless option supports WPA/WPA2 Mixed Mode and WPA2, which encrypts data and allows user authentication. WPA and WPA2 are security standards established by the Wi-Fi Alliance. It's strongly recommended that organizations use WPA2 standard because it provides more enhanced encryption and connectivity.

In addition to the features to restrict access, Toshiba devices also have controls to manage access across devices.

**Role-Based Access Control:** It is easy to manage and implement authentication policies and prevent unauthorized usage of the MFP via role-based access control. The administrator may create different roles and assign them to specific users of the MFP. These roles may be defined as MFP local, or they may be retrieved from a corporate directory attribute. When the user logs in, the MFP retrieves the role information allocated to the user from the directory server, checks the access rights allocated to its role from an ACL (Access Control List) and assigns appropriate access to MFP functions.

Access rights can be managed at a very granular level to ensure users only have access to the functions necessary for their job role. Here is a sample list of access rights that can be associated to a role: Device Setting, Copy, Send Email, File Save, iFax Send, Print, e-Filing, Fax Send, Color Output (Copy, Print), Remote Scan, USB Print/Save, Editing Address Book and Log Management.

**Intrusion Detection:** Toshiba MFPs can take monitoring to the next level with the ability to send alerts. All Toshiba models utilize standard Syslog functionality, which can forward any security-related messages or alerts to an external Security Information & Event Management (SIEM) server for further analysis. This allows any third-party SIEM server or security software to remotely monitor security events on Toshiba devices in real time. This provides flexibility to IT managers to monitor all the network endpoints using a single security software rather than managing the multifunction devices separately.

All Toshiba MFP models are equipped metadata, with an integrity checker functionality. This allows administrators to verify and confirm the integrity of the data within the MFP. It is strongly recommended that the administrator periodically performs integrity checks on the MFP so that illegally modified data (if any) can be reported.

### III. Document Security

Document security protects sensitive documents as they enter the MFP, as they are stored on the MFP and as they leave the MFP through physical or digital means, including print, fax, scan, copy & more—thus securing the documents from end-to-end.

All Toshiba devices support Internet Printing Protocol (IPP) print over HTTPS. The IPP is a specialized Internet protocol for communication between client devices (e.g., computers, mobile phones and tablets) and printers (or print servers). It allows clients to submit print jobs to the printer or print server and perform tasks such as querying the status of a printer, obtaining the status of print jobs or canceling individual print jobs. IPP also supports access control, authentication and encryption, making it a much more capable and secure printing mechanism.

Toshiba MFPs offer several standard print security options.



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- Private Print and Hold Print provide confidential printing of documents. Private Print allows a personal identification number (PIN) to be associated with the print job, only allowing the job to be released after that PIN has been entered at the control panel. Hold Print allows you to hold a job in the hold queue until you continue the job from the touch panel with no PIN required.
- Secure PDF protects scanned documents by enabling users to assign a password that restricts viewing, printing, editing and copying of the scanned information. This is the perfect solution for those wanting to email or store scanned documents without compromising the content.
- The Job Log feature allows you to track data and documents. Print, copy, fax and scan jobs are tracked with detailed information including user, date, time, number of pages, type of paper, and type of job.
- The Security Stamp feature automatically prints the user's information on each page during a print job or fax transmission, inhibiting users from removing internal hard copy documents from the premises. When this feature is enabled, the MFP prints a time/date stamp and user information on the printed page or on the transmitted data during copying, printing, or fax transmission. This stamp shows who generated the output, inhibiting data breaches and provides an audit trail back to the user.
- Hardcopy Security printing allows you to embed a security pattern on the background of a document. The security pattern consists of a background pattern and a string (embedded text in the background pattern). The string embedded in the security pattern emerges when the security pattern-embedded original is copied. This feature will deter the duplication of confidential documents.

## IV. Fleet Security

Finally, Fleet security helps manage security settings and policies across the fleet. Toshiba's e-BRIDGE CloudConnect (eCC) is Toshiba's integrated system of embedded and cloud-based applications that enables remote monitoring and management of Toshiba MFPs. e-BRIDGE CloudConnect securely and reliably collects operation data transmitted from MFPs. Additionally, the administrator can create policies related to the security settings of the MFP and deploy those settings to the fleet via the eCC portal. Any violations to these MFP security policies are flagged and notified to the administrator.

For further information on Print Security, please see the provided attachment.

### Service Solutions

Our local Toshiba branch located in Buffalo Grove, IL, will be responsible for delivery and installation of all MFDs, accessories, and software; network connections; testing; removal of packaging material; and initial training. To minimize any potential disruption to your business operations, we will complete all initial installations as promptly as possible.

Toshiba's dedicated Major Account Executive, Frank Colucci, will ensure the adequate allocation of resources and personnel to accomplish all the tasks outlined in the implementation plan and schedule. Integral to this plan is the delivery and installation of all devices in a timely manner and in accordance with contract requirements. He will also put in place the processes for receiving orders, staging hardware, servicing the new assets, and training DuPage County personnel.





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Toshiba's differentiator is that we ship all products directly to the Toshiba installation facility, who will verify that equipment is free of damage and all parts are in place. Any rejected shipments due to damage, shortages, or other discrepancy are handled by Toshiba. Once accepted, the product is assembled, tested, and configured in accordance with customer specifications and any associated set-up criteria prior to delivery to the customer's place of business.

The installation technician will arrange with DuPage County personnel the appropriate date and time for delivery to and placement at each location. As requested in the RFP, Toshiba can accommodate the County working hours of 8:30 a.m. to 4:30 p.m. (CST). Technicians will comply with all building regulations regarding hours, method, and location of delivery as set forth by the member.

Any changes to the approved delivery schedule are communicated to users to ensure all parties are aware and approve, and that key personnel are available for training.

## Service Methodology

Toshiba is recognized as the service leader in the industry, as evidenced by numerous industry awards and an outstanding performance record. This also is due to the high standards that we require of, and enforce with, our service providers as well as the training and certification programs we administer to ensure that all service technicians are knowledgeable and have all the necessary resources when they are dispatched for service.

Toshiba's service and support model focuses on the use of highly experienced, certified, and responsive technicians; adherence to strict maintenance schedules; tracking product performance; and compliance with manufacturer specifications. With local technicians and support staff, we can provide DuPage County with consistent, high-quality service throughout the term of the contract. Our value-added service and maintenance programs include:

- **Service Dispatch** - Toshiba's local Dispatch Center will support all County end users by receiving, logging, and tracking all service and supply requests in a centralized environment.
- **On-Site Service** - Trained and certified service technicians will correct any deficiencies and perform repairs in response to service calls. This includes necessary adjustments to product, repairs, or replacement of parts which Toshiba determines to be unserviceable.
- **Preventive Maintenance** - We will perform all scheduled preventive maintenance on time and to your satisfaction to ensure your products are always running at optimum levels, to increase the uptime of your units and reduce the number of service calls.
- **Escalation Management** - We offer a clearly defined escalation process to resolve poor performance issues quickly, efficiently, and to your complete satisfaction.
- **Parts/Supplies** - We will provide all parts, labor, service, supplies and consumables, including staples (excluding paper) on time and in the correct types and quantities.
- **Fleet Monitoring** - Remote and continuous fleet monitoring is part of ensuring business continuity through improved device uptime and reliability.
- **Total Satisfaction Guarantee** - Each Toshiba MFD product comes with our exclusive Total Quality Commitment (TQC) guarantee that your product will perform to specifications during the term of the lease, or the product will be replaced. No other manufacturer matches this guarantee.
- **Account Reviews** - Toshiba will hold performance review meetings with County personnel where Account Team members will consult with you and address any issues you may have. During the meeting, we will discuss our service performance and present metrics.
- **Service Level Commitments** – Respond to service calls within four (4) hours or less, and 98% fleet average uptime, quarterly.



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## User Training

At no cost, Toshiba will conduct user training on all Toshiba products for as many users as required. As the fleet is installed, Toshiba's Training Team at each campus location will coordinate onsite training covering basic copying, printing, scanning and faxing. Basic training will ensure your staff's ability to perform common daily functions; Key Operator training will cover more advanced functions.

Training schedules, location, and frequency of sessions will be mutually agreed upon with appropriate DuPage County representatives. The actual length of each course will vary based on training users' needs and background, previous knowledge and machine features and software applications. Training is considered complete when users and key operators are comfortable and feel competent in the complete operation of the hardware.



This training is designed to ensure that all end users are proficient in our product and achieve maximum benefits from our products and solutions. Training is delivered on site by specialized instructors or via web-based applications. The instructor will work closely with your staff to explain, in detail, the features, functions, and benefits of our product to ensure the transition to Toshiba product is a positive experience.

During each session, we will cover product features, programming, functional operations, operator maintenance, replacement of toner cartridges and paper, and address any questions. Toshiba's assigned Implementation Project Manager will coordinate the scheduling of your initial training sessions. The number and types of units by location, system functionality, and specialized applications will be used in designing our training curriculum. These sessions cover, at a minimum:

- Basic print, copy, scan and/or facsimile functions
- Hands-on operating experience
- Feeder functionality and paper supplies
- Finishing options and exposure settings
- How to make a copy from glass and/or PC
- How to make a duplex copy
- How to reprogram drawers
- Zoom features and functions
- Special Applications
- Who to notify if service is needed

### Key Operator Training:

This training provides a dedicated individual (Key Operator) with a more in-depth overview of the product than a basic user. An important objective of the training is to give these individuals hands-on training in non-technical maintenance, such as replacing toner, and cleaning the glass. These sessions cover topics such as:

- Overview of all functions of the product
- Problem determination/correction procedures
- How to add paper and staples
- How to clear a misfeed
- Administrative issues (supplies ordering, requesting service, service contacts and procedures, etc.)

### Additional / Customized Training:

Toshiba will work with the County to determine any additional tools and training that may be appropriate and can provide customized training specific to your company and organization. Our goal is



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to support you and ensure the entire team understands the basic and value-added features and benefits of our machines and program. If there are additional charges associated with this training, we will first receive approval prior to conducting any sessions.

## c) Main attributes that differentiate your firm from other competitors.

Solving business communication challenges using our unique approach and methodology is a key Toshiba differentiator and what distinguishes us as a market leader. Our valued partner focus includes a diverse and powerful array of business communications systems with a single point of accountability, being a vendor-agnostic partner providing proven cost savings and solutions enabling our clients to do more and print less sets Toshiba apart as a world-class technology provider.

- **Industry Experts** –Toshiba experts are trained to determine exactly what your business needs are, and how to improve them. We design our business processes on speed and quality of resolution for the client with solutions backed by in-depth data analytics and robust reporting. Transparent online reporting and detailed information sharing enable us to *provide the client with a better and more efficient experience with Toshiba*. Beyond asset management, Toshiba provides solutions to help our clients:
  - Eliminate redundancy and waste
  - Improve document security
  - Meet industry compliance
  - Create workflow automation
  - Integrate Cloud Solutions
  - Monitor your print fleet locally or via the cloud
  - Easily store and retrieve documents
- **Valued Client Relationships** – Toshiba considers our client relationships and partnerships our most valued asset within our service offerings. We strive to consistently exceed customer expectations and closely collaborate with them to resolve any issues - service, technical or otherwise - timely and to a mutually beneficial resolution. We approach each account with the goal of delivering exactly what the customer requires and expects. We do this by first gaining a clear understanding of our customers’ challenges and then developing meaningful solutions that address their unique requirements. We offer a strategic partnership like no other, this by combining our consultative approach with leading technologies.
- **Client Service** –Toshiba offers local, national and global account management services. Our business processes are based on speed and quality of resolution for the client. Transparent online reporting and detailed information sharing enables us to provide the client a better and efficient experience with Toshiba. Beyond asset management, Toshiba provides benchmarking savings analysis to ensure the client is achieving the objectives we described and agreed upon in our contract while providing us a framework for continuous improvement. Our goal is to maintain client relationships while helping ensure consistent and incremental customer revenue.
- **Focused on Business Communications Solutions** – Unique to Toshiba is our ability to address client needs relating to output management (Managed Print as a Service and print reduction strategies), capture and workflow (helping corporations and organizations tackle challenges transitioning from paper to digital communications), thermal/barcode printing, and finding high-definition destinations for their content (digital display signage). A key differentiator is our



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ability to adapt to clients' operating requirements and provide a sound improvement strategy that considers budgetary, cultural, best practices, technology and security requirements. We work together *to enable clients to print smarter, improve their process workflow and inspiring communications*. Toshiba's background as a global information technology company allows us to offer the latest in business communications systems such as digital signage, retail kiosks, thermal label and receipts printers and POS systems.

- **Vendor Agnostic Approach** – Toshiba differentiates ourselves via our brand-agnostic approach, meaning we can support all types and brands of office printers (A4). When partnering with Toshiba, you partner with a *global technology leader*. Toshiba holds strategic partnerships with leading manufacturers including Brother, HP, KIP, Kodak Alaris, Lexmark, and others.
- **Managed Print as a Service (MPaaS)** – Toshiba is about much more than products. Toshiba is a genuine MPaaS partner that collaborates with our clients to provide detailed assessments, fleet rightsizing, optimization and value-added services to reduce cost and reduce print. MPaaS is the fastest-growing element of Toshiba's portfolio and an area where we excel. Toshiba develops *secure, sustainable and cost-saving solutions* that are scalable to meet the MPS needs of small, medium, and large clients anywhere in the world. This approach enables us to accommodate a more remote workforce as well as needing to keep brick-and-mortar locations running.
- **Printing to Toshiba MFDs from Anywhere** – Toshiba offers our e-BRIDGE Plus application, as part of our e-Bridge Cloud Service, with built-in support for Microsoft's Universal Print infrastructure. Via Universal Print, *users may print to Toshiba MFDs from anywhere* without on-premises print servers or software thereby reducing print and IT infrastructure costs. As with all cloud implementations, security is extremely important, so Toshiba works to provide *end-to-end security* in numerous ways. Highly secure cloud platforms such as Microsoft Azure and Amazon Web Service (AWS) host Elevate Sky Service tools to provide peace of mind. Encrypting client data while helping safeguard information handling are other leading security elements the cloud tools deliver.
- **Award Winning Products** – Our full line of award-winning multifunction printers (MFDs) range from compact desktop to high-speed digital systems to *meet the demands of any size business*. Toshiba products and underlying technology consistently win major awards from prestigious industry and consumer organizations including *Newsweek, Forbes, Fortune, CIO Magazine, Better Buys, Keypoint Intelligence, Industry Analysts, Inc., The Merit Awards, Stevie Awards, The Cannata Report*, and others. Each e-STUDIO MFD features our advanced e BRIDGE™ single board technology that integrates copy, print, scan, facsimile and other networking capabilities in one single board within the device. A completely *scalable open architecture allows seamless integration* of our MFDs into client workflows and a wide variety of business applications.
- **Print Less** – Unlike our competitors, Toshiba's strategy to improve cost savings and sustainability helps clients print less. While moving to a completely paperless office may seem like too ambitious a task, a great place to start is by eliminating unnecessary printing and related paper, toner and cost-per-page charges. Toshiba enables our clients to *print less by providing education, tools and powerful print management software to help reduce paper and toner consumption* by as much as half. As experts in MPaaS, we help businesses print smarter, reduce office waste, and practice sustainable consumption by carefully managing office printing behavior.



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## d) Relevant previous experience with public sector entities.

State and Local Governments (SLG) and public sector entities are our primary markets. For over 30 years Toshiba has been providing solutions to satisfied government and public entities in Illinois and throughout the country. We offer local leadership and decision making with the support of a global manufacturer. Our strong local presence means we can respond quickly and efficiently to all your equipment and service needs. Nationwide Toshiba has provided equipment, service, and support to dozens of public sector clients.

### Relevant Projects

Our extensive client portfolio includes local, national, and global clients from all industries such as education, government, healthcare, financial services, and others. Government entities include States, Cities, and Counties as well as other government agencies and municipalities and consortiums that have education members.

We are pleased to provide the following examples of the positive financial impacts that similar clients have realized because of Toshiba's technology and operational efficiencies:

- Toshiba's Unified Print Program with Los Angeles Unified School District (LAUSD) encompasses over 3,000 MFDs (both mono and color devices) and brought over 2,000 Printers into the MPS program. The program involves assessing each district location and optimizing the fleet. Selecting Toshiba as a single source has resulted in a cost savings to LAUSD of over 60%.
- Toshiba conducted an Encompass analysis and fleet optimization for the City of Minneapolis, Minnesota, one department at a time and subsequently created and presented an optimized solution for each department. The resulting operational cost savings came in at an astounding 73 percent.
- Toshiba performed an Encompass Study of both Cuyahoga County, Ohio, and State Government offices to assess fleet dynamics and develop an optimization strategy. The final solution removed over 2,000 printers and saved the county \$900,000.00 per year.
- Toshiba performed an assessment for Hennepin County, Minnesota and provided a cost effective, secure, and green friendly solution managed by an automated management services/integrated information system to restructure the existing office print environment. The optimization eliminated costly devices, reduced waste, and operating expenses, and saved the County \$3M annually.



## e) Provide a copy of Business License, Tax ID and any significant certification document supporting your firm's expertise.

- Toshiba has been in Good Standing with the Office of Illinois Secretary of State since 1999. Our file number is 60702446.
- Toshiba has been in Good Standing with the California Secretary of State since 1999.
- Our entity number is 2144805.
- Toshiba's Taxpayer Identification Number is 33-0865305

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f) List of three (3) references, preferably from public sector entities, from contracts similar in size and scope to DuPage County including engagement profile, client name, contact name and title, email and telephone contact information.

Client	Contact	Title	Email	Phone
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]



## Key Qualifications

Provide a statement that portrays the firm’s engagement team qualifications in relation to the Scope of Services. The response should include the following:

- a) Background and credentials profile for the team and sub-consultants (if used) that would be assigned to the DuPage County account, including name, position/title, location, years of industry experience, years with firm and number of clients currently assigned.

Partnering with Toshiba provides the dual benefit of a local company with national resources and expertise. With a local sales and service force in Buffalo Grove, Toshiba has the personnel and resources to fully support the requirements of DuPage County. Toshiba will not need to utilize any sub-contractor(s).



Toshiba is currently involved in hundreds of projects similar to the County’s scope of work, both regional and national. Our current and future projects will in no way hinder Toshiba’s commitment to DuPage County on this important project.

Toshiba’s commitment to excellence begins at the top and flows throughout our organization. **Senior Account Executive, Frank Colucci** will be your dedicated Account Manager and single point of contact. The following are Toshiba’s dedicated personnel assigned to DuPage County’s important project:

**Frank Colucci, Senior Account Executive** *(main point-of-contact)*

**Toshiba Business Solutions**

1130 W. Lake Cook Road, Suite 250, Buffalo Grove, IL 60089

Frank has over 35 years of successful experience in the copier industry and manages many key account relationships in Illinois. He is well versed in Toshiba’s complete portfolio of products and solutions. Frank has access to an extensive infrastructure of corporate and field experts and will work closely with Toshiba’s local sales and service teams.

Frank Colucci will ensure the adequate allocation of resources and personnel to accomplish all the tasks outlined in the implementation plan and schedule. Integral to this plan is the delivery and installation of all devices in a timely manner and in accordance with contract requirements. He will also put in place the processes for receiving orders, staging hardware, servicing the new assets, and training DuPage County personnel.

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**Martin Schopp, Vice President & General Manager**

**Toshiba Business Solutions**

1130 W. Lake Cook Road, Suite 250, Buffalo Grove, IL 60089

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Frank is backed by executive leadership in Martin Schopp, Vice President & General Manager in the Illinois marketplace. Martin will serve as your personal advocate to champion your concerns with our corporate leadership. Martin has access to and authority to draw upon our corporate resources as needed to support the DuPage County contract and resolve escalated issues. Executive Sponsorship is facilitated by John Applegate, who will ensure continued high visibility of your account throughout the organization.

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**John Applegate, Region VP, KY/IL/IN**  
**Toshiba Business Solutions**  
2600 Stanley Gault Parkway, Louisville, KY 40223



Regional Vice President, John Applegate will provide executive leadership and support DuPage County's objectives throughout the contract term. In addition, John has access to and authority to draw upon our corporate resources in product marketing, operations, accounting, contracting, IT, and service, as well as our technical field staff, as needed to support the County.

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**John Nick, Senior Solutions Sales Consultant**  
**Toshiba Business Solutions**  
11800 Exit 5 Pkwy, #124, Fishers, IN 46037



John Nick has over 15 years of proven experience in the solution sales field. John will assess, build, and implement strategic solutions based on best practices, his client's needs, and corporate directives. His experience ranges from small county offices, schools, and businesses of all sizes, from small firms to Fortune 500 corporations.

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**Matt Coomes, VP of Service**  
**Toshiba Business Solutions**  
2600 Stanley Gault Parkway, Louisville, KY 40223



Matt Coomes has been in the industry for 43 years, the last 16 at Toshiba. Matt is responsible for Service, the Client Service Center, Supply Fulfillment, the Toshiba Help Desk along with Warehouse/ Operations for Multiple Sates including Illinois. Matt's motto for his entire team is Respond, Respect & Resolve. Matt's Technical Services organization is consistently ranked at or near the top of the rankings inside of Toshiba Business Solutions receiving high marks for client satisfaction, response time and quality of work.

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Tom Riegel, Manager of Services and Operations  
Toshiba Business Solutions  
1220 W. Thorndale Avenue, Itasca, IL 60143

Tom Riegel has over 30 years of industry experience and twenty years with Toshiba. He is the Director of Service and manages the Toshiba service team and makes sure that Toshiba adheres to all contract service commitments. Tom is also responsible for ensuring contract service levels are adhered to and is available for escalated situations.

**b) Areas of expertise of each officer.**

**Senior Account Executive, Frank Colucci** will be DuPage County’s dedicated Account Manager to ensure a seamless transition to Toshiba products and ongoing responsive service and support. Frank is a seasoned sales management professional with over 35 years of successful experience in the copier industry. Our local marketplace, mentioned in the previous question where we described all areas of expertise, will be responsible for delivery and installation of all MFDs, accessories, and software; network connections; testing; removal of packaging material; and initial training.

**Martin Schopp, Vice President/General Manager**, who will provide executive support and deploy Toshiba resources at the corporate level, if they become necessary. Martin will be fully engaged driving Toshiba’s local sales and service efforts to meet the program's objectives. In addition, he will interface with key DuPage County decision makers to validate that Toshiba’s performance exceeds program expectations.

In addition to our dedicated team previously mentioned, Toshiba has over 3,500 service technicians as well as regional experts nationwide to support our customers. Our service infrastructure includes Toshiba Engineers, Advanced Technical Service Specialists, Network Professionals, Solutions Design Experts, and other support personnel to attend to your product and service needs. Each technician servicing your product is backed by a service manager, network specialists, and alternate technicians, if needed who serve as backup during emergency situations.

**c) Communications skills – Interaction with staff and participants.**

Toshiba will work closely with DuPage County to ensure continuous and effective communication at each stage, from the award notification and throughout the duration of the contract term. We recognize that DuPage County has many different cultures, and department heads and users alike need to understand how this shift to a new product will affect their daily business. We are sensitive to these challenges and will work closely with County officials to develop a comprehensive communication plan that announces Toshiba as the new vendor, details our transition strategy and schedules, and promotes the features and benefits of our products and services.

Toshiba’s communication strategy includes identifying the key stakeholders at all levels of your organization. Frank Colucci and other members of the transition team will meet with DuPage County representatives initially and throughout the planning and implementation process to ensure a smooth rollout.



# TOSHIBA

During the initial kick-off meeting, the primary objectives will be project implementation team introduction, scope review, confirmation of roles and responsibilities, determination of implementation preferences, development of the high-level implementation plan, and finalizing first steps. The team will work through tough implementation decisions, such as balancing implementation priorities and identifying machines in mission critical areas.

This team will meet at least weekly throughout the transition phase to review written status reports and address progress, issues, problems, and planning. Throughout the transition, DuPage County will be kept apprised of transition timelines and progress. Any adjustments to transition schedules to accommodate the County's business operations will be made to the maximum extent practical. If desired, Toshiba can develop a SharePoint site for the project to facilitate project team communications. This site would then serve as a repository for all key project documents, as well as allow collaboration on the implementation plans, with access given to appropriate DuPage County and Toshiba personnel.

## Project Understanding

Describe your firm’s interest, understanding and approach to providing services for this engagement, including a schedule for accomplishing the project.

a) Describe the ongoing management for services.

Toshiba is offering DuPage County a local seasoned team of highly successful management professionals to expertly implement, manage and maintain your account. This team will develop the program structure, scope of work and rules for engagement, and oversee and monitor the day-to-day activities of our organization. Toshiba’s account management team comprises comprehensive account management, service, customer service, implementation, professional services, contract administration, and customer service professionals.

Senior Account Executive, Frank Colucci, will be your primary interface and will support every aspect of the transition and ongoing operations. Our Executive Management Team, led by Martin Schopp, Vice President and General Manager, will provide executive leadership and support to all your objectives throughout this term.

Toshiba understands that DuPage County’s anticipated start date for implementation will be April 2024. Upon award, Toshiba will develop an implementation timeline, similar to the example shown to the right, to establish tasks and timeframes to meet your project schedule.

Task Name	Duration	Start Date	End Date
Award Notification	1	TBD	
Pre Installation Planning	1	05/23/16	06/03/16
On-site Meeting	1	05/23/16	06/03/16
Develop deployment strategy	1	05/23/16	06/03/16
Determine Department Contacts	1	05/23/16	06/03/16
Discuss Print Policy	1	05/23/16	06/03/16
Formalize Billing Requirements	1	05/23/16	06/03/16
Program Implementation Planning	5	06/13/16	06/30/16
On-site assessment and network mapping	5	06/13/16	06/30/16
Collect current IP addresses	5	06/13/16	06/30/16
Develop Roll Out Schedule	5	06/13/16	06/30/16
Develop Training Schedule	5	06/13/16	06/30/16
Installation of Fleet Manager	1	06/30/16	07/01/16
Installation and Planning	1	06/30/16	07/01/16
Onsite Execution	1	06/30/16	07/01/16
Maintenance and Support			ongoing
Measure and Control			ongoing
Pre-Flight Set Up	25	06/13/16	06/30/16
MFDs Built to Client Specifications		06/13/16	06/30/16
Equipment Pre-configured at Toshiba		06/13/16	06/30/16
Network information pre loaded		06/13/16	06/30/16
Quality Test run on each MFD		06/13/16	06/30/16
Placement of TEST equipment on Campus		06/13/16	06/30/16
Fleet Installation	10	07/01/16	07/14/16
Fleet Installation by location/department		07/01/16	07/14/16
Removal and Return of Existing Equipment		07/01/16	07/14/16
Training & Professional Development	10	07/01/16	08/05/16
End User Training by Department		07/01/16	08/05/16
Follow up Training by Request			ongoing

Toshiba takes great care to ensure a smooth and seamless implementation across all locations/areas. Implementation goals range from mitigating impact on the business to initiating and communicating account specifics, deployment schedules, identifying workflow processes for device configuration and ease of replication across the fleet, overseeing site surveys and network requirements, portal configuration for service and supply requisitioning, establishing print policies and control processes, overseeing knowledge transfer for training schedules and deployment of training tools.

This includes product mix with projected installation timelines for each location/area. The initial planning phase includes identifying areas and may be prioritized by a variety of characteristics, such as operational expense of fleet, age of fleet, location, usage trends, device to employee ratios, scheduling to limit disruption on work productivity, etc.

Implementation consists of three (3) phases: **Planning, Transition, and Steady State**. Each phase would be characterized by unique teams, activities and deliverables, data requirements, and key success factors. The following illustrates the activities and deliverables Toshiba would provide during the Implementation process.



Phase 1 Planning	Phase 2 Transition	Phase 3 Steady State
<ul style="list-style-type: none"> <li>✓ Client change management</li> <li>✓ Monitoring software</li> <li>✓ Device certification</li> <li>✓ Assessment</li> <li>✓ Policies &amp; procedures</li> <li>✓ Service &amp; supplies</li> <li>✓ Billing format</li> <li>✓ Network requirements</li> </ul>	<ul style="list-style-type: none"> <li>✓ Hardware installation</li> <li>✓ Asset tagging</li> <li>✓ Consumables ordering</li> <li>✓ Output management</li> <li>✓ Weekly reviews</li> </ul>	<ul style="list-style-type: none"> <li>✓ Break/fix</li> <li>✓ Supplies</li> <li>✓ Billing</li> <li>✓ Reporting</li> <li>✓ Account Management</li> </ul>

## PHASE 1: PLANNING

**Planning.** This phase comprises understanding your business needs and our contractual commitments, developing milestone and detailed schedules, providing effective project communications to all stakeholders and project resources, and monitoring and controlling project activities. Roles and responsibilities will be established, as well as communication planning, risk planning, and preliminary schedules. This phase is the most critical phase and will determine the success of the subsequent phases in meeting DuPage County’s objectives. Toshiba will implement the plan according to the customer’s schedule and priorities.

Following approval of our planning strategy which will be put into action in five stages: executing the plan, meeting commitments, making mid-course corrections as needed, measuring customer satisfaction and reviewing performance against program objectives. Regularly scheduled account reviews ensure cost savings and productivity improvements.

## PHASE 2: TRANSITION

**Transition.** This phase will include hardware installation, software installation, and end-user training. Great care is taken during deployment to minimize disruption while getting new equipment installed. In order to ensure a smooth installation process, Toshiba will schedule a meeting with County project leaders and your current contracted vendor who will be removing your existing hardware, to synchronize pre-installation activities so that all parties are well prepared and there is no interruption to the County’s daily operations.

We recognize that DuPage County has many different cultures, and department heads and users alike need to understand how this shift to a new product will affect their daily business. We are sensitive to these challenges and will work closely with County officials to develop a comprehensive communication plan that announces Toshiba as the new vendor, details our transition strategy and schedules, and promotes the features and benefits of our products and services. Additionally, Toshiba will ease the transition to the new devices through extensive in person and on-demand product training.

## PHASE 3: STEADY STATE

**Steady State.** With the proposed solution implemented, Toshiba follows a structured process to transition the processes to the appropriate operational support groups. Toshiba will conduct a formal meeting to share lessons learned and ask for participation in a survey to share feedback. We are well-suited to provide a consistent ongoing support process to ensure continuous cost savings and an exceptional service level.



# TOSHIBA

The transition from Implementation to day-to-day operations will be transparent to the County. The Toshiba Implementation and Operations teams will work in tandem during the transition phase to ensure a seamless changeover to steady state operations.

During regularly scheduled meetings with DuPage County, Toshiba's Account Management Team will review utilization and costs of individual assets and efficiencies for each office and facility. We will discuss any significant changes in models, upgrades, improvements, new software developments, and enhancements to ensure you remain equipped with the most technologically advanced products and solutions to keep your print management fleet optimized and assist in decreasing your operational spend.

The soft cost impacts result from improvements in areas such as processes for creating/revising content, bottlenecks, manual labor and outsourcing costs, hard copy and electronic document filing systems, records retention/disposal policies, government regulatory requirements, enterprise-wide document search and retrieval capabilities and requirements, off-site and on-site disposal/storage usage and costs and current security goals.

## MANAGING CHANGE

Our approach to change management is **Careful Planning, Clear Concise Communication, and Sensitivity** to those affected by the changes. We work closely with administration, department heads and users alike to develop a comprehensive communication plan that announces Toshiba as your preferred vendor, details our transition strategy and schedules, and promotes the features and benefits of our program. We host sessions to ensure the staff understands how the program affects them and the process to ensure prompt resolution of any problems. Furthermore, we help each department manage the transition and end user training to ensure it is a seamless and positive experience. We work resolutely to turn each challenge into a positive learning experience.

Creating, communicating, and executing on a **Print Policy** is a great way to ensure the project remains a success after it is launched. Once in a steady state, you will want to maintain guidelines to ensure the new standards are followed. The primary purpose of a 'Print Policy' is to communicate the intention of the project to end users, and the print policy becomes something everyone can refer back to when making purchasing decisions in the future. Executive sponsorship and ongoing endorsement are extremely important components of a successful change management and print policy deployment.

Toshiba's Account Management Team will ensure that all elements of the transition are met within the predetermined timeframes, as well as continue to assist with the day-to-day activities during the County's important project. Orientation meetings will be scheduled to help staff become familiar with the Toshiba team and operation of Toshiba's products. Toshiba will provide user training and hardware operating guides to assist the end users in quickly learning to operate any new systems. These meetings also provide a forum for DuPage County staff to ask any questions.

Frank Colucci, Senior Account Executive, will be your point-of-contact to ensure the proper installation of all equipment in a timely manner and in accordance with contract requirements. Toshiba will also provide enough personnel and resources to accomplish such tasks as receiving orders, staging equipment, servicing the installing equipment, and training all County personnel.

## ASSET LIFECYCLE MANAGEMENT

Throughout our engagement, Toshiba will be on hand to make recommendations on product disposition: retention, removal, movement, or replacement based on current business needs. Periodically, Toshiba will review your current fleet and, depending upon your current business requirements, we can discuss a



# TOSHIBA

plan for refreshing some of the devices in your fleet. We examine criteria such as total life pages printed, current life remaining on consumable items such as fusers, imaging units, imaging kits, toner cartridges, etc., service history, and remaining life expectancy.

Toshiba has great flexibility in accommodating the County's existing network printer platform. Over the course of the contract, when any legacy printer becomes non-operational due to age and normal wear and tear, and the repair would require substantial investment, Toshiba can meet with DuPage County representatives and present our recommendation. In some circumstances, it may make economic sense to replace the printer. When evaluating the customer's existing legacy printers, Toshiba considers factors such as age of device and the cost of service, the need for confidential/private printing, load balancing and lowering the TCO of your printer fleet.

## BUSINESS REVIEWS TO DRIVE OPTIMIZATION

As part of the DuPage County and Toshiba Partnership, the Toshiba team will present Quarterly Business Reviews. These reviews are used to maintain and improve upon the cost and productivity benefits achieved through the initial analysis and optimization implementation and will highlight our accomplishments in helping the County attain its goals of device and cost reduction. This phase is crucial to ensure that savings are long lasting and continuous improvement goals are attained. Topics for these meetings can include, but are not limited to, the Document Workflow, Mobile and Cloud Printing, Regulatory Compliance and Sustainability.

b) Provide a list of performance metric guarantees that you provide.

### Performance Metrics

Toshiba's standard SLA for on-site response is a **call back within one (1) hour** to verify the request and an average of **four (4) hours on-site service response** after receipt of a service call.

Toshiba also has a **98 percent fleet average uptime**, quarterly.

We use key performance metrics to monitor and assess performance, such as Quality Level of Service, Price, Responsiveness, Lead Time, and Technical Support. Further, our statistical service reporting program alerts us to problem areas such as:

- An excessive number of calls on the same asset in a given month,
- Multiple service calls of the same nature in a given month, and
- Machine downtime during a given month.

Any problems that we identify are analyzed for root cause and corrective measures are promptly enacted. In addition, Toshiba can implement customer surveys to capture our customers' satisfaction with our training, service and products.

### Total Quality Commitment

Toshiba is so confident in the performance of our products that we offer an industry-leading guarantee that ensures the utmost in advanced technology, dependability, service and support. The **Toshiba Quality Commitment (TQC)** is our guarantee that Toshiba products will perform to specifications during the term of the lease or be replaced.



# TOSHIBA

- **FREE REPLACEMENT:** If your Toshiba copier or accessory does not operate within product specifications during the term of this program, and cannot be repaired to perform within product specifications, Toshiba will replace the copier or accessory at no charge with a model of equal or better features and specifications.
- **FREE LOANER:** If your copier is out of service for more than two (2) consecutive days (48 hours) after notifying Toshiba, or requires off-site service, a loaner copier will be provided by Toshiba at no additional charge.



Toshiba firmly stands behind our promise with the assurance of complete satisfaction. Everything we do contributes to that goal—from setting the industry standard for research and development, to providing instant access to Toshiba support personnel.

## Warranty

All new copiers and accessories purchased from Toshiba are subject to a 90-Day Limited Warranty, which covers defective parts and labor. Toshiba's extended maintenance plan offered is structured as a cost-per-click that includes all maintenance, including warranty repair services and the billing term for the services commence upon product installation.

All new printers and accessories purchased from Toshiba are subject to a 12-month standard warranty.

## Preventive Maintenance

Toshiba's Preventative Maintenance (PM) Program is designed to prolong equipment life, improve operation, and reduce the incidence of emergency or breakdown repairs and premature replacement of equipment. This is accomplished through periodic inspecting, cleaning, and replacement. A Toshiba service technician will conduct preventive maintenance at prescribed intervals (quarterly) during which time all major mechanical components are checked, cleaned, and lubricated and worn parts replaced to prevent any downtime.

Toshiba defines preventive (periodic) maintenance for copiers as the summary of actions and procedures necessary for ensuring optimum MFD performance, and for excellent and stable copy quality during the entire life of supplies and parts.

### Such actions include:

- Complete inspection of hardware.
- Routine cleaning and lubrication.
- All necessary adjustments.
- Replacement of worn or broken parts.
- Replacement of consumable items as recommended by Toshiba Service such as feed tires, fuser-cleaning components, and charge coronas; and
- Replacement of environmental consumable items as recommended by Toshiba Service such as ozone, developer, and optics filtration components.
- During PM visits, technicians identify and correct any minor deficiencies as well as perform major repairs in response to service calls. Identifying potential problems and correcting them before they occur helps us to keep your equipment operating at peak performance, increase uptimes, and reduce the number of service calls. Technicians make sure they have the right parts and materials in the proper quantities during the maintenance or service call so there are no delays or downtime.



# TOSHIBA

## We accomplish this through:

- Accurate forecasting.
- Maintaining a minimum 30-day supply inventory on hand at local facilities.
- Using pre-stocked inventory of high usage and critical parts
- Identifying parts and supplies that are both environmentally friendly and help to extend the life of your hardware.

Service technicians will pay particular attention to worn parts, replacing them as necessary, and all areas related to copy and print quality so that no deterioration should be noticeable between PM visits. At the conclusion, the technician will run a number of test copies, checking the copy quality, density, and registration. Where necessary, the technician will make adjustments. In addition, the technician checks the operation of all paper trays, paper feeders, and finishers and ensures that all of the features are functional. The technician also thoroughly cleans the area around the machine and removes packaging materials, old components, and debris from the premises. These steps enable the customer to immediately resume use of the machine in a clean, well-kept environment.

To simplify the PM process, Toshiba products use "service modules" that greatly lowers service costs and maximizes uptime. When you replace these modules, you are essentially refreshing the entire imaging system. Contained in these modules are the components that need to be replaced to maintain optimal image quality and system performance, such as the fuser assembly, drum, transfer assembly, charge corona wires, and developer unit. Each of the service modules is designed to go the entire span of the periodic maintenance interval.

## Service Calls

Toshiba will respond to service calls during normal working hours, **Monday through Friday, 8 a.m. to 5 p.m.**, excluding holidays. Toshiba's National Dispatch Center is open from 5 a.m. to 5 p.m. Pacific Time, Monday through Friday excluding holidays, to receive service calls and supply requests. All service calls are received by Toshiba's local Dispatch Center and entered real-time into our system by a live dispatch agent. This allows the customer to give us details of the issue so it can be communicated to the service technician. The technician is immediately notified of the service call. All field-technicians have company provided cell phones and will call the customer immediately after notification to confirm the call, provide an estimated time of arrival and, if possible, resolve the problem over the telephone.



Toshiba's local service technician will contact DuPage County upon receipt of a dispatch call. He or she will attempt to resolve the customer issue over the telephone. If remote resolution is not achieved, the technician will attend to the repairs on site.

Our service technicians maintain a full stocked inventory of parts and supplies on hand, including feed tires, blades, developer, drums, gears and rollers. For each service call, the technician also stocks their truck with the parts and supplies predicated on the information they receive from the Dispatch Center, i.e., description of the problem, general condition of the machine, and any error codes. This process approach greatly reduces machine downtime and improves service times.

The Dispatch Center can be reached online via your Encompass View Portal, by calling our toll-free number, or the Toshiba Website: <http://business.toshiba.com/tbs/support/service.html>.



# TOSHIBA

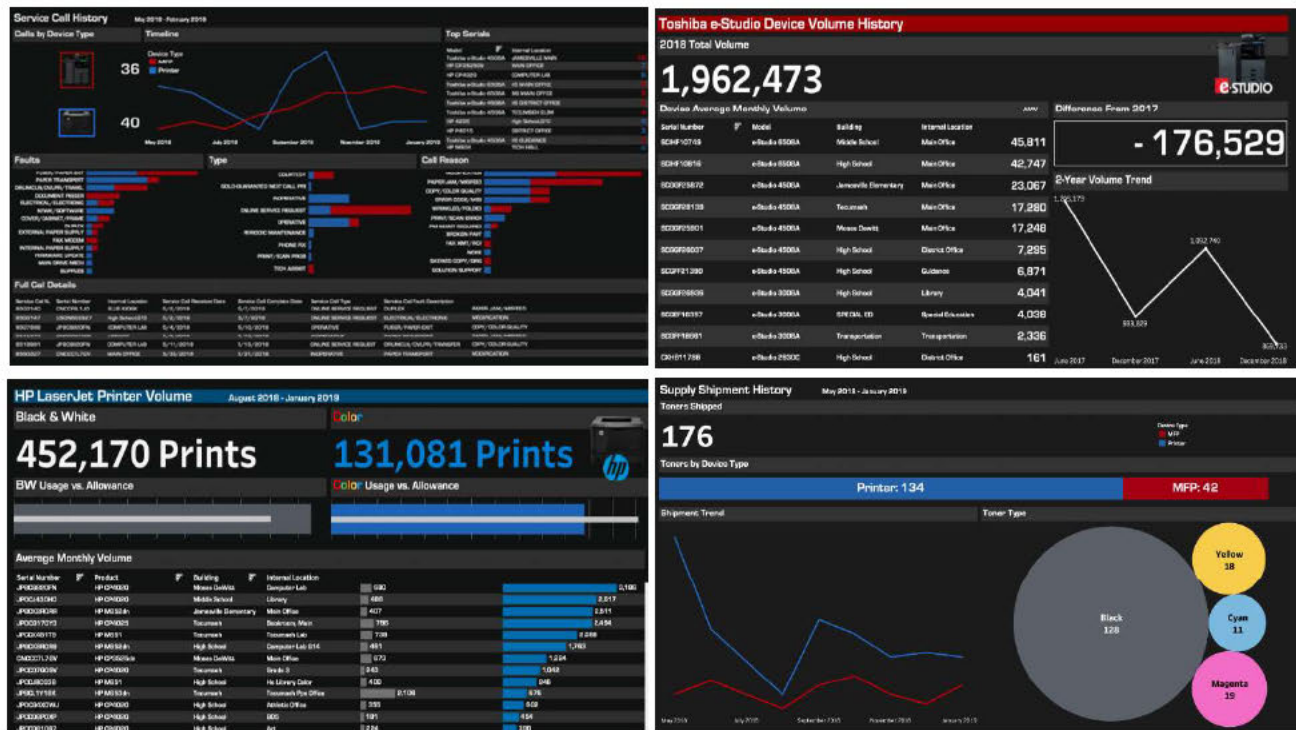
## Quarterly Business Reviews

To monitor our performance and ensure quality service has been delivered to DuPage County, Frank Colucci will attend Quarterly Business Reviews (QBRs) with key County stakeholders. This will be a forum to discuss the performance of your dedicated Account Team, your overall satisfaction with our services and areas where we may improve. Frank will also provide quarterly analysis to optimize DuPage County's managed printer fleet environment as it evolves.

Among the tools we utilize is Tableau, a powerful business intelligence software for data visualizations and during business reviews with our customers. Account data is combined to create dynamic reporting on service trends, volume trends, device utilization, optimization recommendations, billing history, fleet overviews (by dates, locations and departments) and other performance metrics.

Customized Tableau dashboards allow for interactive client engagement during the reviews. Relevant data can be sorted and viewed by an almost infinite number of variables, capable of providing high overview reports while still drilling down to the asset level. These reports can be shared with the County on demand or during our business reviews.

The following are sample Tableau dashboards:



## c) Provide sample incident reports.

TOSHIBA | enc@mpass  
Welcome Matt! (Sign out)

- HOME
- VOLUME
- ACTIVE SERVICE
- SERVICE HISTORY**
- FULL SERVICE DETAILS
- SUPPLY SHIPMENTS
- FULL SUPPLY DETAILS
- SERVICE REQUEST
- FLEET CHANGE REQUEST

### SERVICE HISTORY

**OVERVIEW**

75 Service Calls

48 Unique Devices

**CALL TIMELINE**

**CALLS PER DEVICE**

Serial Number	Tag	Model	# of Calls
SC2LJ22791	WA34515	ESTUDIO8518A	6
SC2LJ22810	WA34518	ESTUDIO8518A	4
SC2KJ24087	WA34666	ESTUDIO3518A	4
S406366600480	WA8943	40G0720	3
SC2KJ22402	WA34519	ESTUDIO5518A	3
S5EAF90841	WA8106	ESTUDIO307G	3
S4063666004DR	WA8928	40G0720	2
SC2KJ22403	WA34492	ESTUDIO5518A	2

**DETAILS OF COMPLETED SERVICE CALLS**

Service Record No.	Serial Number	Tag	Model	Address	Internal Location	SR Incident Date	Call Start Date	Call End Date	CALL DETAILS
4204106	SC2KJ22403	WA14492	ESTUDIO5518A	MCKNIGHT ELEMENTARY	ROOM 218	9/15/2020	9/18/2020	9/18/2020	CALL DETAILS
4212816	S51AK80378	WA14794	ESTUDIO7516ACT	CENTRAL ADMIN OFFICE		9/16/2020	9/16/2020	9/16/2020	CALL DETAILS
4198604	S40635C660...	WA8944	40G0720	MCKNIGHT ELEMENTARY	Office	9/14/2020	9/14/2020	9/14/2020	CALL DETAILS
4146288	SC2LJ22872	WA14629	ESTUDIO5518A	CARSON MIDDLE SCHO.	MAIN OFFICE	9/4/2020	9/11/2020	9/11/2020	CALL DETAILS
4145278	SC2LJ22581	WA14679	ESTUDIO5518A	MARSHALL MIDDLE SCH.		9/4/2020	9/10/2020	9/10/2020	CALL DETAILS
4141966	S466366600...	WA8936	40G0720	CARSON MIDDLE SCHO.	Lab 233	9/3/2020	9/9/2020	9/9/2020	CALL DETAILS
4145292	S40635C660...	WA8942	40G0720	MCKNIGHT ELEMENTARY	Book Room	9/4/2020	9/8/2020	9/8/2020	CALL DETAILS
4141908	S406366600...	WA8928	40G0720	CENTRAL ADMIN OFFICE	Psych Services	9/3/2020	9/4/2020	9/4/2020	CALL DETAILS
4145774	SC2KJ2284	WA14497	ESTUDIO5518A	MCKNIGHT ELEMENTARY	ROOM 316	9/4/2020	9/4/2020	9/4/2020	CALL DETAILS
4145762	SC2KJ22403	WA14492	ESTUDIO5518A	MCKNIGHT ELEMENTARY	ROOM 218	9/4/2020	9/4/2020	9/4/2020	CALL DETAILS
4145798	SC2KJ22415	WA14493	ESTUDIO5518A	MCKNIGHT ELEMENTARY	ROOM 4106 SUPPORT LU.	9/4/2020	9/4/2020	9/4/2020	CALL DETAILS
4145740	SC2KJ22403	WA14492	ESTUDIO5518A	MCKNIGHT ELEMENTARY	LIBRARY	9/4/2020	9/4/2020	9/4/2020	CALL DETAILS

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Welcome Matt! (Sign out)

- HOME
- VOLUME
- ACTIVE SERVICE
- SERVICE HISTORY**
- FULL SERVICE DETAILS**
- SUPPLY SHIPMENTS
- FULL SUPPLY DETAILS
- SERVICE REQUEST
- FLEET CHANGE REQUEST

### FULL SERVICE DETAILS

Device Lookup: (All) | Call Date Filter: April 27, 2020 - September 16, 2020

Service Record #	Technician	Serial Number	Tag	Model	Internal Location	Address	Problem	Machine Fault	Repair	Call Start Date	Call End Date
4204106	5680257	SC2KJ22403	WA14492	ESTUDIO5518A	ROOM 218	MCKNIGH.	INSTALLATIO.	FINISHER/SORTER	MECHANICAL ADJUST	9/18/2020	9/18/2020
4212816	5686041	S51AK80378	WA14794	ESTUDIO7516		CENTRAL.	ERROR CODE.	FUSER/PAPER EXIT	REPLACE PARTS	9/16/2020	9/16/2020
4198604	5676738	S40635C6608T...	WA8944	40G0720	Office	MCKNIGH.	SOLUTION S.	SOLUTION SUPPORT	ISSUE RESOLVED	9/14/2020	9/14/2020
4146288	5635811	SC2LJ22872	WA14629	ESTUDIO5518A	MAINOFFICE	CARSON M.	INSTALLATIO.	ELECTRICAL/ELECTRONIC	REPLACE PARTS	9/11/2020	9/11/2020
4145278	5635038	SC2LJ22581	WA14679	ESTUDIO5518A		MARSHAL.	PRINT/SCAN	Null	Null	9/10/2020	9/10/2020
4141966	5631464	S4063666004...	WA8936	40G0720	Lab 233	CARSON M.	PRINT/SCAN	NTWW/SOFTWARE	ISSUE RESOLVED	9/9/2020	9/9/2020
4145292	5635039	S40635C6603A...	WA8942	40G0720	Book Room	MCKNIGH.	PRINT/SCAN	PRT/SCN ENABLER/CNTRL	REMOTE DIAGNOSIS	9/8/2020	9/8/2020
4141908	5631373	S4063666004...	WA8928	40G0720	Psych Services	CENTRAL.	PRINT/SCAN	ELECTRICAL/ELECTRONIC	NO PROBLEM FOUND	9/4/2020	9/4/2020
4145774	5635442	SC2KJ2284	WA14497	ESTUDIO5518A	ROOM 316	MCKNIGH.	INSTALLATIO.	FINISHER/SORTER	MECHANICAL ADJUST	9/4/2020	9/4/2020
4145762	5635440	SC2KJ22403	WA14492	ESTUDIO5518A	ROOM 218	MCKNIGH.	INSTALLATIO.	FINISHER/SORTER	MECHANICAL ADJUST	9/4/2020	9/4/2020
4145798	5635506	SC2KJ22415	WA14490	ESTUDIO5518A	ROOM A106 SU	MCKNIGH.	INSTALLATIO.	FINISHER/SORTER	MECHANICAL ADJUST	9/4/2020	9/4/2020
4145740	5635438	SC2KJ22400	WA14495	ESTUDIO5518A	LIBRARY	MCKNIGH.	BROKEN PART	COVER/CABINET/FRAME	MECHANICAL ADJUST	9/4/2020	9/4/2020
4145846	5635517	SC2KJ22417	WA14505	ESTUDIO5518A	OFFICE	MCKNIGH.	INSTALLATIO.	FINISHER/SORTER	MECHANICAL ADJUST	9/4/2020	9/4/2020
4145690	5635321	SC2KJ22412	WA14498	ESTUDIO5518A	ROOM 20 LOW	FRANKLIN.	INSTALLATIO.	FINISHER/SORTER	INSTALLATION	9/4/2020	9/4/2020
4145614	5635312	SC2LJ22446	WA14494	ESTUDIO5518A	ROOM 6 LOW.	FRANKLIN.	MODIFICATI.	FINISHER/SORTER	INSTALLATION	9/4/2020	9/4/2020
4145666	5635424	SC2KJ22335	WA14631	ESTUDIO5518A	ROOM 319 MA.	FRANKLIN.	INSTALLATIO.	FINISHER/SORTER	INSTALLATION	9/4/2020	9/4/2020
4145676	5635426	SC2KJ22414	WA14500	ESTUDIO5518A	ROOM 508 SC.	FRANKLIN.	INSTALLATIO.	FINISHER/SORTER	MECHANICAL ADJUST	9/4/2020	9/4/2020
4145570	5635309	S40635C6608T...	WA8943	40G0720	Computer Lab	MCKNIGH.	MODIFICATI.	ELECTRICAL/ELECTRONIC	REPLACE PARTS	9/4/2020	9/4/2020
4129128	5622772	SC2LJ22793	WA34515	ESTUDIO8518A	PRINT SHOP	CENTRAL.	PAPER JAM/...	INTERNAL PAPER SUPPLY	REPLACE PARTS	9/3/2020	9/3/2020
4103742	5604734	SC2KJ21148	WA14693	ESTUDIO3518A		CENTRAL.	COPY/COLOR.	SCAN/OPTIC/LASER	CLEAN/LUBRICATE	8/28/2020	8/28/2020
4103500	5604580	SC2LJ22810	WA34518	ESTUDIO8518A		CENTRAL.	BROKEN PART	FINISHER/SORTER	MECHANICAL ADJUST	8/28/2020	8/28/2020
4096630	5598684	SC2KJ22402	WA34519	ESTUDIO5518A	PRINT SHOP	CENTRAL.	ERROR CODE.	INTERNAL PAPER SUPPLY	MECHANICAL ADJUST	8/27/2020	8/27/2020
400852	5357006	S4063666004...	WA8928	40G0720	Psych Services	CENTRAL.	SOLUTION S.	SOLUTION SUPPORT	ISSUE RESOLVED	8/25/2020	8/25/2020

d) Provide proposed procedures for internal problem escalation and their process for notifying the County in the event of a problem.

Toshiba offers a clearly defined escalation process to resolve poor performance issues quickly, efficiently, and to your complete satisfaction. Generally, most service issues are worked through and resolved at the technician level. When further escalation is needed, you can reach out to your Senior Account Executive, Frank Colucci, at any time.

Frank will escalate the issue to our in-house Service Department will take the following general steps to correct reported instances of compromised service:

1. Meet with local staff responsible for service delivery.
2. Review the problem.
3. Assign internal engineering resources as needed.
4. Determine a solution that is appropriate and acceptable to the County.
5. Arrange for expedited replacement parts or loaner equipment, if necessary.
6. Document the occurrence and resolution.
7. Formulate an action plan to avoid a recurrence.
8. Review the issue during the next scheduled account review.

If it is determined the device is defective and cannot be repaired to function to Toshiba's specification, the device will be replaced.

Toshiba backs each of its products with the best Equipment Performance Warranty in the industry: our **Total Quality Commitment (TQC) Program**. This is our guarantee that your equipment will perform to specifications during the term of the lease, or it will be replaced.



# TOSHIBA

## Price

Please see our Price Proposal provided as a separate attachment.

### Hardware Specification Notes:

- No Trimming on Segment 5 color.
- Toshiba created two additional tabs as alternate bids for segment 4 mono and color.
- Appendix (B) Row (59), Toshiba quoted a sample mono and color printer for MPS in rows 66-68.
- To quote MPS for current printers, Toshiba would need model numbers and volume history.



## Required Forms

1. Proposal Form
2. Required Vendor Ethics Disclosure Statement
3. IRS Form W-9
4. Emergency Preparedness Plan
5. HIPAA Confidentiality Agreement
6. References

**SECTION 8 - PROPOSAL FORM**

(PLEASE TYPE OR PRINT THE FOLLOWING INFORMATION)

Full Name of Offeror	Toshiba Business Solutions, a division of Toshiba America Business Solutions, Inc.
Main Business Address	25530 Commercentre Drive
City, State, Zip Code	Lake Forest, CA 92630
Telephone Number	(800) 866-4361
Fax Number	(949) 462-2557
Proposal Contact Person	Frank Colucci, Senior Account Executive
Email Address	frank.colucci@tbs.toshiba.com

The undersigned certifies that he is:

- the Owner/Sole Proprietor     
  a Member of the Partnership     
  an Officer of the Corporation     
  a Member of the Joint Venture

herein after called the Offeror and that the members of the Partnership or Officers of the Corporation are as follows:

Larry White, President and CEO  
(President or Partner)

Michael Torcaso, Senior VP and CFO  
(Vice-President or Partner)

Jason White, Vice President, General Counsel, & Secretary  
(Secretary or Partner)

Steve Tungate, Vice President, General Manager, Strategic Business Planning & Supply Chain  
(Treasurer or Partner)

Further, the undersigned declares that the only person or parties interested in this Proposal as principals are those named herein; that this Proposal is made without collusion with any other person, firm or corporation; that he has fully examined the proposed forms of agreement and the contract specifications for the above designated purchase, all of which are on file in the office of the Procurement Manager, DuPage Center, 421 North County Farm Road, Wheaton, Illinois 60187, and all other documents referred to or mentioned in the contract documents, specifications and attached exhibits, including Addenda No. 1, \_\_\_\_\_, and \_\_\_\_\_ issued thereto;

Further, the undersigned proposes and agrees, if this Proposal is accepted, to provide all necessary machinery, tools, apparatus and other means of construction, including transportation services necessary to furnish all the materials and equipment specified or referred to in the contract documents in the manner and time therein prescribed.

Further, the undersigned certifies and warrants that he is duly authorized to execute this certification/affidavit on behalf of the Offeror and in accordance with the Partnership Agreement or by-laws of the Corporation, and the laws of the State of Illinois and that this Certification is binding upon the Offeror and is true and accurate.

Further, the undersigned certifies that the Offeror is not barred from proposing on this contract as a result of a violation of either 720 Illinois Compiled Statutes 5/33 E-3 or 5/33E-4, proposal rigging or proposal-rotating or as a result of a violation of 820 ILCS 130/1 et seq., the Illinois Prevailing Wage Act.

The undersigned certifies that he has examined and carefully prepared this proposal and has checked the same in detail before submitting this proposal, and that the statements contained herein are true and correct.

If a Corporation, the undersigned further certifies that the recitals and resolutions attached hereto and made a part hereof were properly adopted by the Board of Directors of the Corporation at a meeting of said Board of Directors duly called and held and have not been repealed, nor modified and that the same remain in full force and effect. (Offeror may be requested to provide a copy of the corporate resolution granting the individual executing the contract documents authority to do so.)



Further, the offeror certifies that he has provided services comparable to the items specified in this contract to the parties listed in the reference section below and authorizes the County to verify references of business and credit at its option.

Finally, the offeror, if awarded the contract, agrees to do all other things required by the contract documents, and that he will take in full payment therefore the sums set forth in the cost schedule.

**PROPOSAL AWARD CRITERIA**

This proposal will be awarded to the most responsive, responsible vendor meeting specifications based upon the highest score compiled during evaluation of the proposals outlined in the selection process.

The Contractor agrees to provide the service described above and in the contract specifications under the conditions outlined in attached documents for the amount stated.

**Signature on File**

\_\_\_\_\_  
President and CEO

CORPORATE SEAL  
(If available)



**PROPOSAL MUST BE SIGNED FOR CONSIDERATION**

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_ AD, 2024

\_\_\_\_\_

My Commission Expires: \_\_\_\_\_  
(Notary Public)

Per page 1 of the RFP, bids do not need to be notarized before submission. Toshiba will notarize the Proposal Form upon the request of DuPage County.

# TOSHIBA

## Exceptions and Clarifications

## VENDOR ETHICS DISCLOSURE FORM



### Required Vendor Ethics Disclosure Statement

Failure to complete and return this form may result in delay or cancellation of the County's Contractual Obligation.

Date: 1/30/2024

Bid/Contract/PO #: 24-019-11

Company Name: Toshiba Business Solutions, a division of Toshiba America Business Solutions, Inc.	Company Contact: Frank Colucci, Senior Account Executive
Contact Phone: [REDACTED]	Contact Email: [REDACTED]

**The DuPage County Procurement Ordinance requires the following written disclosures prior to award:**

1. Every contractor, union, or vendor that is seeking or has previously obtained a contract, change orders to one (1) or more contracts, or two (2) or more individual contracts with the county resulting in an aggregate amount at or in excess of \$25,000, shall provide to Procurement Services Division a written disclosure of all political campaign contributions made by such contractor, union, or vendor within the current and previous calendar year to any incumbent county board member, county board chairman, or countywide elected official whose office the contract to be awarded will benefit. The contractor, union or vendor shall update such disclosure annually during the term of a multi-year contract and prior to any change order or renewal requiring approval by the county board. For purposes of this disclosure requirement, "contractor or vendor" includes owners, officers, managers, lobbyists, agents, consultants, bond counsel and underwriters counsel, subcontractors and corporate entities under the control of the contracting person, and political action committees to which the contracting person has made contributions

**NONE (check here) - If no contributions have been made**

Add Line	Recipient	Donor	Description (e.g. cash, type of item, in-kind services, etc.)	Amount/Value	Date Made
x					
x					

2. All contractors and vendors who have obtained or are seeking contracts with the county shall disclose the names and contact information of their lobbyists, agents and representatives and all individuals who are or will be having contact with county officers or employees in relation to the contractor bid and shall update such disclosure with any changes that may occur.

**NONE (check here) - If no contacts have been made**

Add Line	Lobbyists, Agents and Representatives and all individuals who are or will be having contact with county officers or employees in relation to the contract or bid	Telephone	Email
x			
x			

A contractor or vendor that knowingly violates these disclosure requirements is subject to penalties which may include, but are not limited to, the immediate cancellation of the contract and possible disbarment from future county contracts.

**Continuing disclosure is required, and I agree to update this disclosure form as follows:**

- If information changes, within five (5) days of change, or prior to county action, whichever is sooner
- 30 days prior to the optional renewal of any contract
- Annual disclosure for multi-year contracts on the anniversary of said contract
- With any request for change order except those issued by the county for administrative adjustments

The full text for the county's ethics and procurement policies and ordinances are available at:  
<http://www.dupageco.org/CountyBoard/Policies/>

I hereby acknowledge and understand these requirements.

Authorized Signature: **Signature on File**

Printed Name: Larry White

Title: President and CEO

Date: 02/01/2024

Attach additional sheets if necessary. Sign each sheet and number each page. Page 1 of 1 (total number of pages)





Technology Requisition \$30,000 and Over

421 N. COUNTY FARM ROAD  
WHEATON, IL 60187  
www.dupagecounty.gov

File #: TE-P-0007-24

Agenda Date: 3/5/2024

Agenda #: 19.B.

AWARDING RESOLUTION ISSUED TO INSIGHT PUBLIC SECTOR  
FOR VERITAS NETBACKUP HARDWARE, MAINTENANCE, AND SUPPORT  
FOR INFORMATION TECHNOLOGY  
(CONTRACT TOTAL AMOUNT \$374,718.84)

WHEREAS, the County of DuPage by virtue of its power set forth in the Counties Code (55 ILCS 5/1-1001 et. seq.) is authorized to enter into this Agreement; and

WHEREAS, pursuant to the Governmental Joint Purchasing Act (30 ILCS 525/2), the County is authorized to enter into a Joint Purchasing Agreement for the issuance of a contract purchase order to Insight Public Sector, for the replacement of backup appliances and annual maintenance and support of Veritas Netbackup software, for Information Technology; and

WHEREAS, pursuant to Intergovernmental Agreement between the County of DuPage and the OMNIA Partners Contract #23-6692-03, the County of DuPage will contract with Insight Public Sector; and

WHEREAS, the Technology Committee recommends County Board approval for the issuance of a contract to Insight Public Sector, for the replacement of backup appliances and annual maintenance and support of Veritas Netbackup software, for the period of April 1, 2024 through March 31, 2026, for Information Technology.

NOW, THEREFORE BE IT RESOLVED, that County contract, covering said for the replacement of backup appliances and annual maintenance and support of Veritas Netbackup software, for the period of April 1, 2024 through March 31, 2026 for Information Technology, be, and it is hereby approved for issuance of a contract by the Procurement Division to Insight Public Sector, 6820 Harl Ave., Tempe, AZ 85283-4318, for a contract total amount not to exceed \$374,718.84, per contract pursuant to the OMNIA Partners Contract #23-6692-03.

Enacted and approved this 12th day of March, 2024, at Wheaton, Illinois.

DEBORAH A. CONROY, CHAIR  
DU PAGE COUNTY BOARD

Attest: \_\_\_\_\_

JEAN KACZMAREK, COUNTY CLERK



Procurement Review Comprehensive Checklist  
 Procurement Services Division  
 This form must accompany all Purchase Order Requisitions

<b>SECTION 1: DESCRIPTION</b>			
<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#: 24-0753	RFP, BID, QUOTE OR RENEWAL #: Quote #0227062825	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$374,718.84
COMMITTEE: TECHNOLOGY	TARGET COMMITTEE DATE: 03/05/2024	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$374,718.84
	CURRENT TERM TOTAL COST: \$374,718.84	MAX LENGTH WITH ALL RENEWALS: TWO YEARS	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Insight Public Sector	VENDOR #: 10809	DEPT: Information Technology	DEPT CONTACT NAME: Joe Hamlin
VENDOR CONTACT: Bob Erwin	VENDOR CONTACT PHONE: 480-366-7058	DEPT CONTACT PHONE #: 630-407-5000	DEPT CONTACT EMAIL: Joe.Hamlin@dupagecounty.gov
VENDOR CONTACT EMAIL: berwin@insight.com	VENDOR WEBSITE: www.insight.com	DEPT REQ #:	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Replacement of the backup appliances that are going End of Life with current up to date appliances, plus two (2) years of maintenance and support. We are purchasing off the OMNIA Partners Contract #23-6692-03 for a total of \$374,718.84.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished This procurement is necessary because backups are a vital part of IT. Having our backups on unsupported hardware could lead to data loss.			

<b>SECTION 2: DECISION MEMO REQUIREMENTS</b>	
DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required.
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.
COOPERATIVE (DPC2-352), GOVERNMENT JOINT PURCHASING ACT (30ILCS525) OR GSA SCHEDULE PRICING	

<b>SECTION 3: DECISION MEMO</b>	
STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact. CUSTOMER SERVICE
SOURCE SELECTION	Describe method used to select source. Members of the IT team demoed various companies that provided backup solutions. We found Veritas to meet all of our needs, we then decided to purchase using the OMNIA - COOP.
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action). 1. Keep running on unsupported hardware. 2. Approve this procurement to ensure the county's data is being safely backed up.

### SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

<b>JUSTIFICATION</b>	Select an item from the following dropdown menu to justify why this is a sole source procurement.
<b>NECESSITY AND UNIQUE FEATURES</b>	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
<b>MARKET TESTING</b>	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
<b>AVAILABILITY</b>	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

### SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: Insight Public Sector Inc.	Vendor#: 10809	Dept: Information Technology	Division:
Attn: Bob Erwin	Email: berwin@insight.com	Attn: Sarah Godzicki	Email: Sarah.Godzicki@dupagecounty.gov
Address: 6820 Harl Ave.	City: Tempe	Address: 421 N. County Farm Road	City: Wheaton
State: AZ	Zip: 85283-4318	State: IL	Zip: 60187
Phone: 800-467-4448	Fax:	Phone: 630-407-5037	Fax: 630-407-5001
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: SAME AS ABOVE	Vendor#:	Dept: Information Technology	Division:
Attn:	Email:	Attn: Joe Hamlin	Email: Joe.Hamlin@dupagecounty.gov
Address:	City:	Address: 421 N. County Farm Road	City: Wheaton
State:	Zip:	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5000	Fax: 630-407-5001
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Apr 1, 2024	Contract End Date (PO25): Mar 31, 2026
Contract Administrator (PO25): Joe Hamlin			



**Purchase Requisition Line Details**

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/Activity Code	Unit Price	Extension
1	1	EA		Equipment	FY24	1100	1215	54100	COVID-19_ STAND	95,562.34	95,562.34
2	1	EA		Subscriptions	FY24	1100	1215	53807	COVID-19_ STAND	226,108.00	226,108.00
3	1	EA		Deployment Services	FY24	1100	1215	53807	COVID-19_ STAND	51,248.50	51,248.50
4	1	EA		Additional Storage	FY24	1100	1215	53807	COVID-19_ STAND	1,800.00	1,800.00
<b>FY is required, assure the correct FY is selected.</b>										Requisition Total	\$ 374,718.84

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Please send PO to Sarah Godzicki & Joe Hamlin and copy both when emailing PO to vendor.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached:     W-9     Vendor Ethics Disclosure Statement

Cobb County

**Contract # 23-6692-03**

*for*

Technology Product Solutions and Related Services

*with*

**Insight Public Sector**

Effective: May 1, 2023

The following documents comprise the executed contract between the Cobb County, and Insight Pubic Sector effective May 1, 2023:

- I. Executed Master Agreement
- II. Supplier's Response to the RFP, incorporated by reference



Reference Number	
Reference Depart.	Purchasing Department

Master Agreement

Owner: Cobb County Board of Commissioners  
100 Cherokee Street  
Marietta, GA 30090

Contractor: Insight Public Sector, Inc.  
2701 E. Insight Way  
Chandler, AZ 85286

Description: **TECHNOLOGY PRODUCT SOLUTIONS AND RELATED SERVICES:** The undersigned parties understand and agree to comply with and be bound by the entire contents of **Sealed Bid #23-6692** ("the RFP") and the Contractor's Proposal submitted October 13, 2022, which is incorporated herein by reference.

**OMNIA PARTNERS, PUBLIC SECTOR:** Supplier agrees to extend Goods and/or Services to public agencies (state and local governmental entities, public and private primary, secondary and higher education entities, non-profit entities, and agencies for the public benefit) ("Public Agencies") registered with OMNIA Partners, Public Sector ("Participating Public Agencies") under the terms of this agreement ("Master Agreement").

Governing Law: This Agreement shall be governed by the laws of the State of Georgia. As to any dispute hereunder, venue shall be in the Superior Court of Cobb County, Georgia.

Term: This Agreement shall begin on May 1, 2023, the Effective Date, for a period of thirty-six months, and shall automatically terminate and renew for two (2) additional twelve (12) month periods and shall terminate absolutely on April 30, 2028, unless earlier terminated as provided herein. Pursuant to O.C.G.A. § 36-60-13, this Agreement shall terminate absolutely and without further obligation on the part of the County at the close of the calendar year in which it was executed and at the close of each succeeding calendar for which it may be renewed. The Parties reserve the right to renew, amend or extend the Agreement for additional terms. Either party may terminate this Agreement for convenience and/or due to lack of funding at the end of each annual term.

Price: Prices for services and equipment, if applicable, as stated in the Contractor's proposal

Billing: For purchases made by Cobb County Government, all original invoices shall be submitted directly to the Cobb County Finance Department. Invoices shall bill only for items received during the period covered by the invoice and shall clearly identify such items in accordance with invoicing guidelines in the Sealed Bid Proposal. For purchases made by participating public agencies, the Contractor shall comply with each agency's invoicing and billing requirements outlined on the applicable order.

{SIGNATURES ON NEXT PAGE}

IN WITNESS, WHEREOF, this Agreement has been executed by Owner and accepted by Contractor to be effective as of the date first above written.



*Cobb County... Expect the Best!*

Cobb County Board of Commissioners  
100 Cherokee Street  
Marietta, GA 30090

Signature on File

Lisa N. Cupid, Chairwoman  
Cobb County Board of Commissioners

5/5/23  
Date



**APPROVED**  
PER MINUTES OF  
COBB COUNTY  
BOARD OF COMMISSIONERS

3/14/23

Insight Public Sector, Inc.  
2701 E. Insight Way  
Chandler, AZ 85286

Signature on File

Authorized signature  
M. S. [Signature]  
Title  
4/4/2023  
Date

FEDERAL TAX ID NUMBER

36-3949000

Approved as to form

Signature on File

County Attorney's Office

April 25, 2023  
Date

**SOLD-TO PARTY 10002733**

DUPAGE COUNTY  
 421 N COUNTY FARM RD  
 WHEATON IL 60187-3978

**SHIP-TO**

DUPAGE COUNTY  
 421 N COUNTY FARM RD  
 WHEATON IL 60187-3978

**We deliver according to the following terms:**

**Payment Terms** : Net 90 days  
**Ship Via** : Insight Assigned Carrier/Ground  
**Terms of Delivery** : FOB DESTINATION  
**Currency** : USD

Quotation	
<b>Quotation Number</b>	: <a href="#">0227062825</a>
<b>Document Date</b>	: 26-JAN-2024
<b>PO Number</b>	:
<b>PO release:</b>	:
<b>Sales Rep</b>	: Bob Erwin
<b>Email</b>	: <a href="mailto:BOB.ERWIN@INSIGHT.COM">BOB.ERWIN@INSIGHT.COM</a>
<b>Telephone</b>	: +14803667058
<b>Sales Rep 2</b>	: Lia Paredes
<b>Email</b>	: <a href="mailto:LIA.PAREDES@INSIGHT.COM">LIA.PAREDES@INSIGHT.COM</a>
<b>Telephone</b>	: +14809021145

Material	Material Description	Quantity	Unit Price	Extended Price
<a href="#">33934-M0034</a>	Veritas NetBackup Flex 5260 Appliance - Config C - hard drive array OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 58211.99 Discount: 24.866%	1	43,736.78	43,736.78
<a href="#">33935-M0034</a>	Veritas NetBackup Flex 5260 Appliance - Config C - hard drive array OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 67796.99 Discount: 24.866%	1	50,938.56	50,938.56
<a href="#">33523-M0034</a>	Veritas NetBackup Flex 5260 - Subscription license (3 years) + Maintenance Coverage Dates: 01-APR-2024 - 31-MAR-2026 OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 1197.99 Discount: 83.472%	140	198.00	27,720.00
<a href="#">33523-M0034</a>	Veritas NetBackup Flex 5260 - Subscription license (3 years) + Maintenance Coverage Dates: 01-APR-2024 - 31-MAR-2026 OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 1197.99 Discount: 83.472%	206	198.00	40,788.00
<a href="#">26710-M3</a>	Veritas Flex Appliance Premium Deployment Service - installation / configuration - 1 incident - on-site OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 20158.99 Discount: 5.488%	1	19,052.59	19,052.59



Material	Material Description	Quantity	Unit Price	Extended Price
<a href="#">26710-M3</a>	Veritas Flex Appliance Premium Deployment Service - installation / configuration - 1 incident - on-site OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 20158.99 Discount: 5.488%	1	19,052.59	19,052.59
<a href="#">30096-M3</a>	Veritas Standard Deployment Service - installation / configuration - 1 incident - on-site OPEN MARKET	1	6,253.42	6,253.42
<a href="#">30097-M3-DPC</a>	Veritas Standard Deployment Service - installation / configuration - 1 incident - on-site Coverage Dates: 01-APR-2024 - 31-MAR-2026 OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 7183.99 Discount: 4.094%	1	6,889.90	6,889.90
<a href="#">32294-M3-DPC</a>	VERITAS FREIGHT GO GREEN SERVICE, FLEX APPLIANCE 5260 140TB, FLEX APPLIANCE 5260 206TB - UNITED STATES-IL - GO GREEN Coverage Dates: 01-APR-2024 - 31-MAR-2026 OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 925.99 Discount: 4.211%	1	887.00	887.00
<a href="#">32961-M0022</a>	Veritas Alta Data Protection - On-Premise subscription license (2 years) + Essential Support - 1 front end TB OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 5293.99 Discount: 82.811%	70	910.00	63,700.00
<a href="#">32957-M0022-DPC</a>	Veritas Alta Recovery Vault - subscription license (2 years) - 1 back end TB Coverage Dates: 01-APR-2024 - 31-MAR-2026 OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 158.99 Discount: 5.654%	150	150.00	22,500.00
<a href="#">33429-M0022-DPC</a>	VERITAS ALTA SAAS PROTECTION ENTERPRISE MICROSOFT 365 SUITE 1 USER HOSTED SUBSCRIPTION LICENSE INITIAL 24MO GOV Coverage Dates: 01-APR-2024 - 31-MAR-2026 OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND SERVICES(# 23-6692-03) List Price: 47.99 Discount: 12.482%	1,700	42.00	71,400.00
<a href="#">33415-M0022-DPC</a>	VERITAS ALTA SAAS PROTECTION ENTERPRISE ADDITIONAL STORAGE LIMIT 5 FRONT END TB HOSTED STANDARD SUBSCRIPTION LICENSE 24MO GOV Coverage Dates: 01-APR-2024 - 31-MAR-2026 OMNIA PARTNERS (COBB COUNTY) IT PRODUCTS AND	1	1,800.00	1,800.00

Material	Material Description	Quantity	Unit Price	Extended Price
	SERVICES(# 23-6692-03) List Price: 1983.99 Discount: 9.274%			
			Product Subtotal	330,360.24
			Services Subtotal	44,358.60
			TAX	0.00
			<b>Total</b>	<b>374,718.84</b>

Thank you for choosing Insight. Please contact us with any questions or for additional information about Insight's complete IT solution offering.

Sincerely,

Bob Erwin  
 +14803667058  
[BOB.ERWIN@INSIGHT.COM](mailto:BOB.ERWIN@INSIGHT.COM)

Lia Paredes  
 +14809021145  
[LIA.PAREDES@INSIGHT.COM](mailto:LIA.PAREDES@INSIGHT.COM)  
 Fax 4807608347

To purchase under this contract, your agency must be registered with OMNIA Partners Public Sector.

Insight Global Finance has a wide variety of flexible financing options and technology refresh solutions. Contact your Insight representative for an innovative approach to maximizing your technology and developing a strategy to manage your financial options.

This purchase is subject to Insight's online Terms of Sale unless you have a separate purchase agreement signed by you and Insight, in which case, that separate agreement will govern. Insight's online Terms of Sale can be found at the "terms-and-policies" link below.

**SOFTWARE AND CLOUD SERVICES PURCHASES:** If your purchase contains any software or cloud computing offerings ("Software and Cloud Offerings"), each offering will be subject to the applicable supplier's end user license and use terms ("Supplier Terms") made available by the supplier or which can be found at the "terms-and-policies" link below. By ordering, paying for, receiving or using Software and Cloud Offerings, you agree to be bound by and accept the Supplier Terms unless you and the applicable supplier have a separate agreement which governs.  
<https://www.insight.com/terms-and-policies>



# Required Vendor Ethics Disclosure Statement

Failure to complete and return this form may result in delay or cancellation of the County's Contractual Obligation.

Date: Feb 20, 2024

Bid/Contract/PO #: \_\_\_\_\_

Company Name: Insight Public Sector, Inc.	Company Contact: Bob Erwin
Contact Phone: 480-366-7058	Contact Email: Bob.Erwin@Insight.com

## The DuPage County Procurement Ordinance requires the following written disclosures prior to award:

1. Every contractor, union, or vendor that is seeking or has previously obtained a contract, change orders to one (1) or more contracts, or two (2) or more individual contracts with the county resulting in an aggregate amount at or in excess of \$25,000, shall provide to Procurement Services Division a written disclosure of all political campaign contributions made by such contractor, union, or vendor within the current and previous calendar year to any incumbent county board member, county board chairman, or countywide elected official whose office the contract to be awarded will benefit. The contractor, union or vendor shall update such disclosure annually during the term of a multi-year contract and prior to any change order or renewal requiring approval by the county board. For purposes of this disclosure requirement, "contractor or vendor" includes owners, officers, managers, lobbyists, agents, consultants, bond counsel and underwriters counsel, subcontractors and corporate entities under the control of the contracting person, and political action committees to which the contracting person has made contributions.

**NONE (check here) - If no contributions have been made**

Recipient	Donor	Description (e.g. cash, type of item, in-kind services, etc.)	Amount/Value	Date Made

2. All contractors and vendors who have obtained or are seeking contracts with the county shall disclose the names and contact information of their lobbyists, agents and representatives and all individuals who are or will be having contact with county officers or employees in relation to the contractor bid and shall update such disclosure with any changes that may occur.

**NONE (check here) - If no contacts have been made**

Lobbyists, Agents and Representatives and all individuals who are or will be having contact with county officers or employees in relation to the contract or bid	Telephone	Email

A contractor or vendor that knowingly violates these disclosure requirements is subject to penalties which may include, but are not limited to, the immediate cancellation of the contract and possible disbarment from future county contracts.

### Continuing disclosure is required, and I agree to update this disclosure form as follows:

- If information changes, within five (5) days of change, or prior to county action, whichever is sooner
- 30 days prior to the optional renewal of any contract
- Annual disclosure for multi-year contracts on the anniversary of said contract
- With any request for change order except those issued by the county for administrative adjustments

### The full text for the county's ethics and procurement policies and ordinances are available at:

<http://www.dupageco.org/CountyBoard/Policies/>

**I hereby acknowledge that I have received, have read, and understand these requirements.**

Authorized Signature Signature on File

Printed Name Lisanne Steinheiser

Title Global Compliance Officer

Date Feb 20, 2024

**Attach additional sheets if necessary. Sign each sheet and number each page. Page 1 of 1 (total number of pages)**





## Technology Requisition under \$30,000

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
[www.dupagecounty.gov](http://www.dupagecounty.gov)

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**File #:** 24-0834

**Agenda Date:** 3/5/2024

**Agenda #:** 6.C.

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Procurement Review Comprehensive Checklist  
 Procurement Services Division  
 This form must accompany all Purchase Order Requisitions

**SECTION 1: DESCRIPTION**

<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#: 24-0755	RFP, BID, QUOTE OR RENEWAL #: Quote #011724-C	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$25,746.69
COMMITTEE: TECHNOLOGY	TARGET COMMITTEE DATE: 03/05/2024	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$25,746.69
	CURRENT TERM TOTAL COST: \$25,746.69	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Sergeant Laboratories, INC	VENDOR #: 32759	DEPT: Information Technology	DEPT CONTACT NAME: Joe Hamlin
VENDOR CONTACT: Matt Vande Slunt	VENDOR CONTACT PHONE: 608-788-9143x200	DEPT CONTACT PHONE #: 630-407-5000	DEPT CONTACT EMAIL: Joe.Hamlin@dupagecounty.gov
VENDOR CONTACT EMAIL: mvandeslunt@provecompliance.com	VENDOR WEBSITE:	DEPT REQ #:	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Annual AristotleInsight Network appliance licensing, exempt from bidding per 55 ILCS 5/5-1022 "Competitive Bids" (d) IT/Telecom purchases under \$35,000.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished AristotleInsight is a diagnostic and monitoring and log management tool. This tool is utilized as part of the County's Cybersecurity program to help identify risks, remediate and document the results.			

**SECTION 2: DECISION MEMO REQUIREMENTS**

DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required. PER 55 ILCS 5/5-1022 'COMPETITIVE BIDS' (D) IT/TELECOM PURCHASES UNDER \$35,000.00
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.

**SECTION 3: DECISION MEMO**

STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact.
SOURCE SELECTION	Describe method used to select source.
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action).

### SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

<b>JUSTIFICATION</b>	Select an item from the following dropdown menu to justify why this is a sole source procurement.
<b>NECESSITY AND UNIQUE FEATURES</b>	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
<b>MARKET TESTING</b>	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
<b>AVAILABILITY</b>	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

### SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: Sergeant Laboratories, Inc.	Vendor#: 32759	Dept: Information Technology	Division:
Attn: Matt Vande Slunt	Email: mvandeslunt@provecompliance.com	Attn: Sarah Godzicki	Email: Sarah.Godzicki@dupagecounty.gov
Address:	City:	Address: 421 N. County Farm Road	City: Wheaton
State:	Zip:	State: IL	Zip: 60187
Phone: 630-788-9143 x200	Fax:	Phone: 630-407-5037	Fax: 630-407-5001
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Sergeant Laboratories, Inc.	Vendor#: 32759	Dept: Information Technology	Division:
Attn:	Email:	Attn: Joe Hamlin	Email: Joe.Hamlin@dupagecounty.gov
Address: 560 Lester Avenue	City: Onalaska	Address: 421 N. County Farm Road	City: Wheaton
State: WI	Zip: 54650	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5000	Fax: 630-407-5001
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Mar 15, 2024	Contract End Date (PO25): Mar 14, 2025
Contract Administrator (PO25): Joe Hamlin			



**Purchase Requisition Line Details**

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/Activity Code	Unit Price	Extension
1	1	EA		Annual AristotleInsight Network appliance Licensing	FY24	1000	1110	53807		25,746.69	25,746.69
<b><i>FY is required, assure the correct FY is selected.</i></b>										Requisition Total	\$ 25,746.69

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Please send PO to Sarah Godzicki & Joe Hamlin and copy both when emailing PO to vendor.  **First Invoice Allowed Date: 03/08/2024**
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached:     W-9     Vendor Ethics Disclosure Statement



# Invoice

## ARISTOTLEINSIGHT

Date: 2/20/2024

Invoice #: 011724-C

Ref/PO #: \_\_\_\_\_

Payment Due Date: 3/15/2024

Remit To:

Sergeant Laboratories, Inc  
560 Lester Ave  
Onalaska, WI 54650

Matt Vande Slunt  
(608)788-9143  
[mvandeslunt@sqtllabs.com](mailto:mvandeslunt@sqtllabs.com)

To:


DuPage County  
421 N County Farm Road  
Wheaton, IL 60187

Michelle Amanti  
(630) 407-5020  
[michelle.amanti@dupageco.org](mailto:michelle.amanti@dupageco.org)

Salesperson	Ship Method	Shipping Terms	Payment Terms	Due Date
		FOB Destination		3/15/2024

Qty	Description	Line Total
1	One-Year AristotleInsight® License 3/15/24 – 3/15/25 Includes: -Updates -Phone Support -Hardware Support & Warranty -Customer Success Program	25,746.69
2,000	Licensed Connections	Included

<i>Subtotal</i>	\$25,746.69
<i>Sales Tax</i>	Paid by Customer
<i>Total</i>	\$25,746.69

 Contract 47QTCA18D00DN

Any amounts payable by Licensee hereunder that remain unpaid after the due date shall be subject to a late charge equal to the lesser of the maximum amount permissible by law or 1.5% per month from the due date until such amount is paid.

**Thank you for your business!**



GENERAL SERVICES ADMINISTRATION  
Federal Supply Service  
Authorized Federal Supply Schedule Price List

On-line access to contract ordering information, terms and conditions, up-to-date pricing, and the option to create an electronic delivery order are available through GSA Advantage!, a menu-driven database system. The INTERNET address GSA Advantage! is: GSAAadvantage.gov.

General Purpose Commercial Information  
Technology Equipment, Software and Services

FSC GROUP Class 70, STANDARD INDUSTRY GROUP: 70

FSC Product code: D399

Contract number: 47QTCA18D00DN

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at [fss.gsa.gov](http://fss.gsa.gov).

Contract period: June 11, 2023 through June 10, 2028

Sergeant Laboratories, Inc.  
560 Lester Ave  
Onalaska, WI 54650  
DUNS: 799853846 CAGE Code: 539D1  
Matt R Vande Slunt, Operations  
[mvandeslunt@sgtlabs.com](mailto:mvandeslunt@sgtlabs.com)  
V: 608-788-9143 F: N/A

Contractor's internet address/web site where schedule information can be found: [www.provecompliance.com](http://www.provecompliance.com)

Business size: Small

1a. Table of awarded special item number(s) with appropriate cross-reference to item descriptions and awarded price(s).

SIN 33411

PART #	PRODUCT	DESCRIPTION	GSA PRICE
DV100	AristotleInsight	Computer hardware with enterprise-wide Continuous Diagnostics & Monitoring Security Platform (Vulnerabilities, Cyber Hygiene, Data in Motion, Insider Threats, User Behavior, Data Access, Configurations, SIEM, Privileged Users, APT, Rogue Devices) Refer to price list file for Detail. (up to 100 enterprise endpoints)	\$12,740.39
DV250	AristotleInsight	Computer hardware with enterprise-wide Continuous Diagnostics & Monitoring Security Platform (Vulnerabilities, Cyber Hygiene, Data in Motion, Insider Threats, User Behavior, Data Access, Configurations, SIEM, Privileged Users, APT, Rogue Devices) Refer to price list file for Detail. (up to 250 enterprise endpoints)	\$20,143.99
DV500	AristotleInsight	Computer hardware with enterprise-wide Continuous Diagnostics & Monitoring Security Platform (Vulnerabilities, Cyber Hygiene, Data in Motion, Insider Threats, User Behavior, Data Access, Configurations, SIEM, Privileged Users, APT, Rogue Devices) Refer to price list file for Detail. (up to 500 enterprise endpoints)	\$28,487.91
DV750	AristotleInsight	Computer hardware with enterprise-wide Continuous Diagnostics & Monitoring Security Platform (Vulnerabilities, Cyber Hygiene, Data in Motion, Insider Threats, User Behavior, Data Access, Configurations, SIEM, Privileged Users, APT, Rogue Devices) Refer to price list file for Detail. (up to 750 enterprise endpoints)	\$34,890.41
DV1000	AristotleInsight	Computer hardware with enterprise-wide Continuous Diagnostics & Monitoring Security Platform (Vulnerabilities, Cyber Hygiene, Data in Motion, Insider Threats, User Behavior, Data Access, Configurations, SIEM, Privileged Users, APT, Rogue Devices) Refer to price list file for Detail. (up to 1,000 enterprise endpoints)	\$40,287.98





DV2500	AristotleInsight	Computer hardware with enterprise-wide Continuous Diagnostics & Monitoring Security Platform (Vulnerabilities, Cyber Hygiene, Data in Motion, Insider Threats, User Behavior, Data Access, Configurations, SIEM, Privileged Users, APT, Rogue Devices) Refer to price list file for Detail. (up to 2,500 enterprise endpoints)	\$63,700.90
DV5000	AristotleInsight	Computer hardware with enterprise-wide Continuous Diagnostics & Monitoring Security Platform (Vulnerabilities, Cyber Hygiene, Data in Motion, Insider Threats, User Behavior, Data Access, Configurations, SIEM, Privileged Users, APT, Rogue Devices) Refer to price list file for Detail. (up to 5,000 enterprise endpoints)	\$90,086.67

1b.

PART #	PRODUCT	DESCRIPTION	GSA PRICE
DV100	AristotleInsight	Computer hardware with enterprise-wide Continuous Diagnostics & Monitoring Security Platform (Vulnerabilities, Cyber Hygiene, Data in Motion, Insider Threats, User Behavior, Data Access, Configurations, SIEM, Privileged Users, APT, Rogue Devices) Refer to price list file for Detail. (up to 100 enterprise endpoints)	\$12,740.39

1c. Not applicable

2. Maximum order. \$500,000

3. Minimum order. \$100.00

4. Geographic coverage 50 United States; District of Columbia; Puerto Rico

5. Point(s) of production:  
560 Lester Ave  
Onalaska, WI 54650

6. Discount from list prices or statement of net price. Net prices set forth above.

7. Quantity discounts. 2% for order \$250,000 or More

8. Prompt payment terms. Net 30

9a. Government purchase cards are accepted at or below the micro-purchase threshold.

9b. Government purchase cards are accepted above the micro-purchase threshold.

10. Foreign items (list items by country of origin). None.

11a. Time of delivery. 15 business days ARO

11b. Expedited Delivery. As negotiated with ordering agency and the contractor.

11c. Overnight and 2-day delivery. As negotiated with ordering agency and the contractor.

11d. Urgent Requirements. As negotiated with ordering agency and the contractor.

12. F.O.B. point(s). Destination.

13a. Ordering address.  
560 Lester Ave  
Onalaska, WI 54650

13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPA's) are found in Federal Acquisition Regulation (FAR) 8.405-3.



14. Payment address.  
560 Lester Ave  
Onalaska, WI 54650

15. Warranty provision.

Section 5.01 – Representations and Warranties: Licensor represents and warrants that for the first ninety (90) days after shipment, the Products will substantially conform in material functional respects to the applicable Documentation.

Section 5.02 – LIMITED WARRANTY: Except for the limited warranty specified above, LICENSOR AND ITS SUPPLIERS DO NOT AND CANNOT WARRANT THE PERFORMANCE OR RESULTS LICENSEE MAY OBTAIN BY USING THE PRODUCT OR DOCUMENTATION. EXCEPT AS EXPRESSLY SET FORTH IN SECTION 5.01 AND EXCEPT FOR ANY WARRANTY, CONDITION, REPRESENTATION OR TERM TO THE EXTENT TO WHICH THE SAME CANNOT OR MAY NOT BE EXCLUDED OR LIMITED BY LAW APPLICABLE TO LICENSEE IN LICENSEE’S JURISDICTION, LICENSOR AND ITS SUPPLIERS HEREBY EXPRESSLY DISCLAIM ANY AND ALL WARRANTIES, CONDITIONS, REPRESENTATIONS, GUARANTEES OR TERMS (EXPRESS OR IMPLIED WHETHER BY STATUTE, COMMON LAW, CUSTOM, USAGE OR OTHERWISE) AS TO ANY MATTER INCLUDING WITHOUT LIMITATION THE WARRANTIES OF MERCHANTABILITY, INTEGRATION, SATISFACTORY QUALITY, FITNESS FOR ANY PARTICULAR PURPOSE.

16. Export packing charges, if applicable. Not Applicable

17. Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level). None.

18. Terms and conditions of rental, maintenance, and repair (if applicable). Not Applicable

19. Terms and conditions of installation (if applicable). Not Applicable

20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable). Not Applicable

20a. Terms and conditions for any other services (if applicable). Not Applicable

21. List of service and distribution points (if applicable). Not Applicable

22. List of participating dealers (if applicable). Not Applicable

23. Preventive maintenance (if applicable). Not Applicable

24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants). Not Applicable

24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor’s website or other location.) The EIT standards can be found at: [www.Section508.gov/](http://www.Section508.gov/). [www.provecompliance.com](http://www.provecompliance.com)

25. Data Universal Number System (DUNS) number. 799853846

26. Contractor is registered and current in the SAM database.



**TERMS AND CONDITIONS APPLICABLE TO PURCHASE OF  
GENERAL PURPOSE COMMERCIAL INFORMATION TECHNOLOGY NEW  
EQUIPMENT (SPECIAL ITEM NUMBER 132-8)**

**1. MATERIAL AND WORKMANSHIP**

All equipment furnished hereunder must satisfactorily perform the function for which it is intended.

**2. ORDER**

Written orders, EDI orders (GSA Advantage! and FACNET), credit card orders, and orders placed under blanket purchase agreements (BPA) agreements shall be the basis for purchase in accordance with the provisions of this contract. If time of delivery extends beyond the expiration date of the contract, the Contractor will be obligated to meet the delivery and installation date specified in the original order.

For credit card orders and BPAs, telephone orders are permissible.

**3. TRANSPORTATION OF EQUIPMENT**

**FOB DESTINATION.** Prices cover equipment delivery to destination, for any location within the geographic scope of this contract.

**4. INSTALLATION AND TECHNICAL SERVICES**

a. **INSTALLATION.** When the equipment provided under this contract is not normally self-installable, the Contractor's technical personnel shall be available to the ordering activity, at the ordering activity's location, to install the equipment and to train ordering activity personnel in the use and maintenance of the equipment. The charges, if any, for such services are listed below, or in the price schedule:

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

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

c. **OPERATING AND MAINTENANCE MANUALS.** The Contractor shall furnish the ordering activity with one (1) copy of all operating and maintenance manuals which are normally provided with the equipment being purchased.





## 5. INSPECTION/ACCEPTANCE

The Contractor shall only tender for acceptance those items that conform to the requirements of this contract. The ordering activity reserves the right to inspect or test any equipment that has been tendered for acceptance. The ordering activity may require repair or replacement of nonconforming equipment at no increase in contract price. The ordering activity must exercise its post acceptance rights (1) within a reasonable time after the defect was discovered or should have been discovered; and (2) before any substantial change occurs in the condition of the item, unless the change is due to the defect in the item.

## 6. WARRANTY

a. Unless specified otherwise in this contract, the Contractor's standard commercial warranty as stated in the contract's commercial pricelist will apply to this contract.

Section 5.01 – Representations and Warranties: Licensor represents and warrants that for the first ninety (90) days after shipment, the Products will substantially conform in material functional respects to the applicable Documentation.

Section 5.02 – LIMITED WARRANTY: Except for the limited warranty specified above, LICENSOR AND ITS SUPPLIERS DO NOT AND CANNOT WARRANT THE PERFORMANCE OR RESULTS LICENSEE MAY OBTAIN BY USING THE PRODUCT OR DOCUMENTATION. EXCEPT AS EXPRESSLY SET FORTH IN SECTION 5.01 AND EXCEPT FOR ANY WARRANTY, CONDITION, REPRESENTATION OR TERM TO THE EXTENT TO WHICH THE SAME CANNOT OR MAY NOT BE EXCLUDED OR LIMITED BY LAW APPLICABLE TO LICENSEE IN LICENSEE'S JURISDICTION, LICENSOR AND ITS SUPPLIERS HEREBY EXPRESSLY DISCLAIM ANY AND ALL WARRANTIES, CONDITIONS, REPRESENTATIONS, GUARANTEES OR TERMS (EXPRESS OR IMPLIED WHETHER BY STATUTE, COMMON LAW, CUSTOM, USAGE OR OTHERWISE) AS TO ANY MATTER INCLUDING WITHOUT LIMITATION THE WARRANTIES OF MERCHANTABILITY, INTEGRATION, SATISFACTORY QUALITY, FITNESS FOR ANY PARTICULAR PURPOSE.

b. The Contractor warrants and implies that the items delivered hereunder are merchantable and fit for use for the particular purpose described in this contract.

c. Limitation of Liability. Except as otherwise provided by an express or implied warranty, the Contractor will not be liable to the ordering activity for consequential damages resulting from any defect or deficiencies in accepted items.

d. If inspection and repair of defective equipment under this warranty will be performed at the Contractor's plant, the address is as follows:

## 7. PURCHASE PRICE FOR ORDERED EQUIPMENT

## 8. RESPONSIBILITIES OF THE CONTRACTOR

The Contractor shall comply with all laws, ordinances, and regulations (Federal, State, City or otherwise) covering work of this character, and shall include all costs, if any, of such compliance in the prices quoted in this offer.



Sergeant Laboratories

#### 9. TRADE-IN OF INFORMATION TECHNOLOGY EQUIPMENT

When an ordering activity determines that Information Technology equipment will be replaced, the ordering activity shall follow the contracting policies and procedures in the Federal Acquisition Regulation (FAR), the policies and procedures regarding disposition of information technology excess personal property in the Federal Property Management Regulations (FPMR) (41 CFR 101-43.6), and the policies and procedures on exchange/sale contained in the FPMR (41 CFR part 101-46).



## Required Vendor Ethics Disclosure Statement

Failure to complete and return this form may result in delay or cancellation of the County's Contractual Obligation.

Date: Feb 20, 2024

Bid/Contract/PO #: 011724-C

Company Name: Sergeant Laboratories, Inc	Company Contact: Matt Vande Slunt
Contact Phone: (608) 788-9143	Contact Email: mvandeslunt@sgtlabs.com

### The DuPage County Procurement Ordinance requires the following written disclosures prior to award:

1. Every contractor, union, or vendor that is seeking or has previously obtained a contract, change orders to one (1) or more contracts, or two (2) or more individual contracts with the county resulting in an aggregate amount at or in excess of \$25,000, shall provide to Procurement Services Division a written disclosure of all political campaign contributions made by such contractor, union, or vendor within the current and previous calendar year to any incumbent county board member, county board chairman, or countywide elected official whose office the contract to be awarded will benefit. The contractor, union or vendor shall update such disclosure annually during the term of a multi-year contract and prior to any change order or renewal requiring approval by the county board. For purposes of this disclosure requirement, "contractor or vendor" includes owners, officers, managers, lobbyists, agents, consultants, bond counsel and underwriters counsel, subcontractors and corporate entities under the control of the contracting person, and political action committees to which the contracting person has made contributions.

**NONE (check here) - If no contributions have been made**

Recipient	Donor	Description (e.g. cash, type of item, in-kind services, etc.)	Amount/Value	Date Made

2. All contractors and vendors who have obtained or are seeking contracts with the county shall disclose the names and contact information of their lobbyists, agents and representatives and all individuals who are or will be having contact with county officers or employees in relation to the contractor bid and shall update such disclosure with any changes that may occur.

**NONE (check here) - If no contacts have been made**

Lobbyists, Agents and Representatives and all individuals who are or will be having contact with county officers or employees in relation to the contract or bid	Telephone	Email

A contractor or vendor that knowingly violates these disclosure requirements is subject to penalties which may include, but are not limited to, the immediate cancellation of the contract and possible disbarment from future county contracts.

**Continuing disclosure is required, and I agree to update this disclosure form as follows:**

- If information changes, within five (5) days of change, or prior to county action, whichever is sooner
- 30 days prior to the optional renewal of any contract
- Annual disclosure for multi-year contracts on the anniversary of said contract
- With any request for change order except those issued by the county for administrative adjustments

**The full text for the county's ethics and procurement policies and ordinances are available at:**

<http://www.dupageco.org/CountyBoard/Policies/>

**I hereby acknowledge that I have received, have read, and understand these requirements.**

Authorized Signature

**Signature on File**

Printed Name

Matt Vande Slunt

Title

Operations

Date

Feb 20, 2024

**Attach additional sheets if necessary. Sign each sheet and number each page. Page \_\_\_\_\_ of \_\_\_\_\_ (total number of pages)**





## Technology Requisition under \$30,000

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
[www.dupagecounty.gov](http://www.dupagecounty.gov)

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**File #:** 24-0835

**Agenda Date:** 3/5/2024

**Agenda #:** 6.D.

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Procurement Review Comprehensive Checklist  
 Procurement Services Division  
 This form must accompany all Purchase Order Requisitions

<b>SECTION 1: DESCRIPTION</b>			
<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#: 24-0750	RFP, BID, QUOTE OR RENEWAL #: Quote #5286	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$18,444.96
COMMITTEE: TECHNOLOGY	TARGET COMMITTEE DATE: 03/05/2024	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$18,444.96
	CURRENT TERM TOTAL COST: \$18,444.96	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: SiteImprove, Inc.	VENDOR #: 14039	DEPT: IT	DEPT CONTACT NAME: Debra Deacy
VENDOR CONTACT: Luke Jerviss	VENDOR CONTACT PHONE: 612-259-9125	DEPT CONTACT PHONE #: 630-407-5009	DEPT CONTACT EMAIL: Debra.Deacy@dupagecounty.gov
VENDOR CONTACT EMAIL: lgj@siteimprove.com	VENDOR WEBSITE:	DEPT REQ #:	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Annual fee for Siteimprove web governance service, exempt from bidding per 55 ILCS 5/5-1022 'Competitive Bids' (d) IT/Telecom purchases under \$35,000.00.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished Siteimprove is used by the County to scan our website to check for things such as broken links, misspelled words, and accessibility issues. It is also used to alert IT staff to any downtime issues with the website.			

<b>SECTION 2: DECISION MEMO REQUIREMENTS</b>	
DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required. PER 55 ILCS 5/5-1022 'COMPETITIVE BIDS' (D) IT/TELECOM PURCHASES UNDER \$35,000.00
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.

<b>SECTION 3: DECISION MEMO</b>	
STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact.
SOURCE SELECTION	Describe method used to select source.
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action).

### SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

<b>JUSTIFICATION</b>	Select an item from the following dropdown menu to justify why this is a sole source procurement.
<b>NECESSITY AND UNIQUE FEATURES</b>	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
<b>MARKET TESTING</b>	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
<b>AVAILABILITY</b>	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

### SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: SiteImprove, Inc.	Vendor#: 14039	Dept: IT	Division:
Attn: Luke Jerviss	Email: lgj@siteimprove.com	Attn: Sarah Godzicki	Email: Sarah.Godzicki@dupagecounty.gov
Address: 5600 West 83rd Street, Suite 400	City: Bloomington	Address: 421 N. County Farm Road	City: Wheaton
State: MN	Zip: 55437	State: IL	Zip: 60187
Phone: 612-259-9125	Fax:	Phone: 630-407-5037	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: SAME AS ABOVE	Vendor#:	Dept: IT	Division:
Attn:	Email:	Attn: Debra Deacy	Email: Debra.Deacy@dupagecounty.gov
Address:	City:	Address: 421 N. County Farm Road	City: Wheaton
State:	Zip:	State: IL	Zip: 60187
Phone:	Fax:	Phone: 630-407-5009	Fax:
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): May 1, 2024	Contract End Date (PO25): Apr 30, 2025
Contract Administrator (PO25): Debra Deacy			



**Purchase Requisition Line Details**

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/Activity Code	Unit Price	Extension
1	1	EA		Annual Fee for Quality Assurance, Accessibility, & SEO, up to 6,000 pages; response up to 13 check points; PDF Checker up to 10,000 PDFs	FY24	1000	1110	53020		18,444.96	18,444.96
<b><i>FY is required, assure the correct FY is selected.</i></b>										Requisition Total	\$ 18,444.96

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Please send PO to Sarah & Debbie and copy both when emailing vendor.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached:     W-9         Vendor Ethics Disclosure Statement

# PO REQUEST FORM

PO request number: S00004418-20240501



## Bill To

DuPage County  
Sarah Godzicki  
421 N County Farm Rd  
Wheaton  
Illinois 60187  
United States

## Sold To

DuPage County  
Sarah Godzicki  
421 N County Farm Rd  
Wheaton  
Illinois 60187  
United States

## TERMS AND CONDITIONS

<b>Quote Number with T&amp;C</b>	5286	<b>Period</b>	May 01, 2024 - Apr 30, 2025
<b>Billing Frequency</b>	Annual	<b>Payment Term</b>	Net 60
<b>Billing Method</b>	Email		

PRODUCT DETAILS	Type	Quantity	Unit	Price Per Period
Standard Support	recurring	1.00	Each	0.00 USD
Accessibility	recurring	6,000.00	Pages	
Analytics	recurring	10,000,000.00	Yearly Page Views	
Behavior Map	recurring	250.00	Behavior Map	
PDF-check of documents	recurring	10,000.00	PDFs	
Quality Assurance & Policy	recurring	6,000.00	Pages	
SEO	recurring	6,000.00	Pages	
			<b>Total Price Per Period</b>	<b>18,444.96 USD</b>

The Total Price Per Period includes a renewal Price Increase of 3.00 %

Total subscription fee is exclusive of any applicable taxes.

**DO NOT PAY. This is not an invoice**

**Siteimprove, Inc**  
5600 West 83rd Street  
Suite 400  
Bloomington  
Minnesota 55437  
United States  
EIN : 203425009



## Required Vendor Ethics Disclosure Statement

Failure to complete and return this form may result in delay or cancellation of the County's Contractual Obligation.

Date: Feb 20, 2024

Bid/Contract/PO #: 5286

Company Name: Siteimprove, Inc.	Company Contact: Accounts Receivable
Contact Phone: 855-748-3467 ext 1	Contact Email: accountsreceivable@siteimprove.com

### The DuPage County Procurement Ordinance requires the following written disclosures prior to award:

1. Every contractor, union, or vendor that is seeking or has previously obtained a contract, change orders to one (1) or more contracts, or two (2) or more individual contracts with the county resulting in an aggregate amount at or in excess of \$25,000, shall provide to Procurement Services Division a written disclosure of all political campaign contributions made by such contractor, union, or vendor within the current and previous calendar year to any incumbent county board member, county board chairman, or countywide elected official whose office the contract to be awarded will benefit. The contractor, union or vendor shall update such disclosure annually during the term of a multi-year contract and prior to any change order or renewal requiring approval by the county board. For purposes of this disclosure requirement, "contractor or vendor" includes owners, officers, managers, lobbyists, agents, consultants, bond counsel and underwriters counsel, subcontractors and corporate entities under the control of the contracting person, and political action committees to which the contracting person has made contributions.

**NONE (check here) - If no contributions have been made**

Recipient	Donor	Description (e.g. cash, type of item, in-kind services, etc.)	Amount/Value	Date Made

2. All contractors and vendors who have obtained or are seeking contracts with the county shall disclose the names and contact information of their lobbyists, agents and representatives and all individuals who are or will be having contact with county officers or employees in relation to the contractor bid and shall update such disclosure with any changes that may occur.

**NONE (check here) - If no contacts have been made**

Lobbyists, Agents and Representatives and all individuals who are or will be having contact with county officers or employees in relation to the contract or bid	Telephone	Email

A contractor or vendor that knowingly violates these disclosure requirements is subject to penalties which may include, but are not limited to, the immediate cancellation of the contract and possible disbarment from future county contracts.

### Continuing disclosure is required, and I agree to update this disclosure form as follows:

- If information changes, within five (5) days of change, or prior to county action, whichever is sooner
- 30 days prior to the optional renewal of any contract
- Annual disclosure for multi-year contracts on the anniversary of said contract
- With any request for change order except those issued by the county for administrative adjustments

### The full text for the county's ethics and procurement policies and ordinances are available at:

<http://www.dupageco.org/CountyBoard/Policies/>

I hereby acknowledge that I have received, have read, and understand these requirements.

Authorized Signature Signature on File

Printed Name Kevin Kenner

Title Director of Finance

Date February 20, 2024 | 13:59 CST

Attach additional sheets if necessary. Sign each sheet and number each page. Page 1 of 1 (total number of pages)





## HS Change Order with Resolution

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
www.dupagecounty.gov

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**File #:** HS-CO-0001-24

**Agenda Date:** 2/20/2024

**Agenda #:** 7.A.

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AMENDMENT TO PURCHASE ORDER 6640-0001 SERV  
ISSUED TO BENEVATE, INC. D/B/A NEIGHBORLY SOFTWARE  
FOR GRANTS MANAGEMENT SOFTWARE  
(INCREASE CONTRACT \$8,000.00)

WHEREAS, Purchase Order 6640-0001 SERV was issued to Benevate, Inc. D/B/A Neighborly Software on October 1, 2023 by the Procurement Department; and

WHEREAS, the Human Services Committee recommends a Change Order to amend purchase order 6640-0001 SERV, to increase the contract total in the amount of \$8,000.00 for the implementation of the SmartyStreets add-on.

NOW, THEREFORE, BE IT RESOLVED, that the County Board adopts the Change Order dated February 1, 2024, increasing Contract Purchase Order 6640-0001 SERV issued to Benevate, Inc. D/B/A Neighborly Software, in the amount of \$8,000.00, resulting in an amended contract total amount of \$142,000.00.

Enacted and approved this 27<sup>th</sup> day of February, 2024 at Wheaton, Illinois.

\_\_\_\_\_  
DEBORAH A. CONROY, CHAIR  
DU PAGE COUNTY BOARD

Attest: \_\_\_\_\_  
JEAN KACZMAREK, COUNTY CLERK



# Request for Change Order

## Procurement Services Division

Attach copies of all prior Change Orders

Date: Feb 2, 2024

MinuteTraq (IQM2) ID #: \_\_\_\_\_

<b>Purchase Order #:</b> 6640	<b>Original Purchase Order Date:</b> Oct 1, 2023	<b>Change Order #:</b>	<b>Department:</b> Community Services
<b>Vendor Name:</b> BENEVATE, INC		<b>Vendor #:</b> 37839	<b>Dept Contact:</b> Joan Fox

**Background and/or Reason for Change Order Request:**

- 1) To change Account Codes lines 1 and 2 from 53806 to 54107 as these are considered capital expenses
- 2) To change Account Codes line 3 from 53806 to 53807;
- 3) Change Account Codes line 4 from 5000-1770-53806 to 1000-1750-53807 for FY2026.
- 4) Add line for SmartyStreets add-on to implementation, at a cost of \$4,000 for 1st year, 5000-1770-53107-ERA2
- 5) Add line for SmartyStreets add-on for 2nd year (maintenance) costs of \$4,000, 5000-1770-53807-ERA2

**IN ACCORDANCE WITH 720 ILCS 5/33E-9**

- (A) Were not reasonably foreseeable at the time the contract was signed.
- (B) The change is germane to the original contract as signed.
- (C) Is in the best interest for the County of DuPage and authorized by law.

**INCREASE/DECREASE**

A	Starting contract value	\$134,000.00
B	Net \$ change for previous Change Orders	
C	Current contract amount (A + B)	\$134,000.00
D	Amount of this Change Order <input checked="" type="checkbox"/> Increase <input type="checkbox"/> Decrease	\$8,000.00
E	New contract amount (C + D)	\$142,000.00
F	Percent of current contract value this Change Order represents (D / C)	5.97%
G	Cumulative percent of all Change Orders (B+D/A); (60% maximum on construction contracts)	5.97%

**DECISION MEMO NOT REQUIRED**

- Cancel entire order       Close Contract       Contract Extension (29 days)       Consent Only
- Change budget code from: Change lines 1 and 2 from 53806 to 54107 to: Change lines 3 and 4 as described above
- Increase/Decrease quantity from: \_\_\_\_\_ to: \_\_\_\_\_
- Price shows: \_\_\_\_\_ should be: \_\_\_\_\_
- Decrease remaining encumbrance and close contract       Increase encumbrance and close contract       Decrease encumbrance       Increase encumbrance

**DECISION MEMO REQUIRED**

- Increase (greater than 29 days) contract expiration from: \_\_\_\_\_ to: \_\_\_\_\_
- Increase ≥ \$2,500.00, or ≥ 10%, of current contract amount       Funding Source \_\_\_\_\_
- OTHER - explain below:

\_\_\_\_\_

<b>Signature on File</b> _____			<b>Signature on File</b> _____		
Prepared By (Initials)	Phone Ext	Date	Recommended for Approval (Initials)	Phone Ext	Date
<b>REVIEWED BY (Initials Only)</b>					
<b>Signature on File</b>					
Buyer	Date	Procurement Officer	Date		
Chief Financial Officer (Decision Memos Over \$25,000)	Date	Chairman's Office (Decision Memos Over \$25,000)	Date		



# Decision Memo

## Procurement Services Division

This form is required for all Professional Service Contracts over \$25,000 and as otherwise required by the Procurement Review Checklist.

Date: Feb 1, 2024

MinuteTraq (IQM2) ID #: \_\_\_\_\_

Department Requisition #: \_\_\_\_\_

Requesting Department: Community Services	Department Contact: Joan Fox
Contact Email: joan.fox@dupagecounty.gov	Contact Phone: 630-407-6426
Vendor Name: Benevate, Inc	Vendor #: 37839

**Action Requested** - Identify the action to be taken and the total cost; for instance, approval of new contract, renew contract, increase contract, etc.

Increase contract amount to include feature of Smarty Streets.

**Summary Explanation/Background** - Provide an executive summary of the action. Explain why it is necessary and what is to be accomplished.

This is an IT approved recommendation. Ensuring the addresses inputted by an applicant is a valid address will increase efficiency. Smart Streets verifies addresses directly from the USPS database.

**Strategic Impact**

Select one of the six strategic imperatives in the County's Strategic Plan this action will most impact and provide a brief explanation.

This feature will make customer service more efficient and effective.

**Source Selection/Vetting Information** - Describe method used to select source.

Smarty Streets is \$4,000.00, annually and is available directly through the Neighborly Software System. Neighborly is a current vendor which provides the application in which Smart Streets will be used.

**Recommendations/Alternatives** - Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request.

Don't use smart streets and allow applicants to use invalid addresses which may increase duplicate applications and cause delays in verification processes.

**Fiscal Impact/Cost Summary** - Include projected cost for each fiscal year, approved budget amount and account number, source of funds, and any future funding requirements along with any narrative.

Smarty Streets is \$4,000.00 annually. We will require 2 years of use. Financial impact is \$8,000 to be paid: \$4,000 for 1st year ( implementation) from 5000-1770-53107-ERA2 & 2nd year (maintenance) costs of \$4,000, 5000-1770-53807-ERA2





# Required Vendor Ethics Disclosure Statement

Failure to complete and return this form may result in delay or cancellation of the County's Contractual Obligation.

Date: 01/23/2024

Bid/Contract/PO #: \_\_\_\_\_

Company Name: <b>Benevate Inc. dba Neighborly Software</b>	Company Contact: <b>Jason Rusnak</b>
Contact Phone: <b>703-864-7231</b>	Contact Email: <b>Jason.Rusnak@NeighborlySoftware.com</b>

## The DuPage County Procurement Ordinance requires the following written disclosures prior to award:

1. Every contractor, union, or vendor that is seeking or has previously obtained a contract, change orders to one (1) or more contracts, or two (2) or more individual contracts with the county resulting in an aggregate amount at or in excess of \$25,000, shall provide to Procurement Services Division a written disclosure of all political campaign contributions made by such contractor, union, or vendor within the current and previous calendar year to any incumbent county board member, county board chairman, or countywide elected official whose office the contract to be awarded will benefit. The contractor, union or vendor shall update such disclosure annually during the term of a multi-year contract and prior to any change order or renewal requiring approval by the county board. For purposes of this disclosure requirement, "contractor or vendor" includes owners, officers, managers, lobbyists, agents, consultants, bond counsel and underwriters counsel, subcontractors and corporate entities under the control of the contracting person, and political action committees to which the contracting person has made contributions.

**NONE (check here) - If no contributions have been made**

Recipient	Donor	Description (e.g. cash, type of item, in-kind services, etc.)	Amount/Value	Date Made

2. All contractors and vendors who have obtained or are seeking contracts with the county shall disclose the names and contact information of their lobbyists, agents and representatives and all individuals who are or will be having contact with county officers or employees in relation to the contractor bid and shall update such disclosure with any changes that may occur.

**NONE (check here) - If no contacts have been made**

Lobbyists, Agents and Representatives and all individuals who are or will be having contact with county officers or employees in relation to the contract or bid	Telephone	Email

A contractor or vendor that knowingly violates these disclosure requirements is subject to penalties which may include, but are not limited to, the immediate cancellation of the contract and possible disbarment from future county contracts.

**Continuing disclosure is required, and I agree to update this disclosure form as follows:**

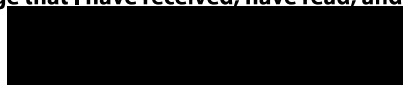
- If information changes, within five (5) days of change, or prior to county action, whichever is sooner
- 30 days prior to the optional renewal of any contract
- Annual disclosure for multi-year contracts on the anniversary of said contract
- With any request for change order except those issued by the county for administrative adjustments

**The full text for the county's ethics and procurement policies and ordinances are available at:**

<http://www.dupageco.org/CountyBoard/Policies/>

**I hereby acknowledge that I have received, have read, and understand these requirements.**

Authorized Signature



Printed Name

Jason Rusnak

Title

President

Date

01/23/2024

**Attach additional sheets if necessary. Sign each sheet and number each page. Page 1 of 1 (total number of pages)**



## Care Center Requisition Under \$30,000

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
[www.dupagecounty.gov](http://www.dupagecounty.gov)

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**File #:** 24-0722

**Agenda Date:** 2/20/2024

**Agenda #:** 7.B.

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Procurement Review Comprehensive Checklist  
 Procurement Services Division  
 This form must accompany all Purchase Order Requisitions

**SECTION 1: DESCRIPTION**

<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#: 23-0605	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$22,800.00
COMMITTEE: HUMAN SERVICES	TARGET COMMITTEE DATE: 02/20/2024	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$22,800.00
	CURRENT TERM TOTAL COST: \$22,800.00	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: CareVoyant, Inc.	VENDOR #: 13829	DEPT: 7433	DEPT CONTACT NAME: Shauna Berman
VENDOR CONTACT: Kandasamy Pasupathy	VENDOR CONTACT PHONE: 847-925-9148	DEPT CONTACT PHONE #: 630-784-4261	DEPT CONTACT EMAIL: shauna.berman@dupagecounty.gov
VENDOR CONTACT EMAIL: pasu@carevoyant.com	VENDOR WEBSITE:	DEPT REQ #: 7433	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). CV hosting for large database and additional licenses for the DuPage Care Center, for the period May 1, 2024 through April 30, 2025, for a total contract not to exceed \$22,800.00, per Other Professional Services.			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished CareVoyant stores data from our Legacy Medical Records, as DuPage Care Center is required by law to maintain Medical records (eight user licenses)			

**SECTION 2: DECISION MEMO REQUIREMENTS**

DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required.
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.
OTHER PROFESSIONAL SERVICES (DETAIL SELECTION PROCESS ON DECISION MEMO)	

**SECTION 3: DECISION MEMO**

STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact. FINANCIAL PLANNING
SOURCE SELECTION	Describe method used to select source. The DuPage Care Center owns the CareVoyant Clinical/Financial System, that is at the DuPage Care Center. CareVoyant stores the medical records, that is required by law.
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action). 1) Approve contract for CV hosting for large database for the for the DuPage Care Center, for the period May 1, 2024 through April 30, 2025. 2) Do not approve contract for CV hosting for large database for the for the DuPage Care Center, for the period May 1, 2024 through April 30, 2025, however, the DuPage Care Center will still need to maintain medical records, required by law.



## SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

<b>JUSTIFICATION</b>	Select an item from the following dropdown menu to justify why this is a sole source procurement.
<b>NECESSITY AND UNIQUE FEATURES</b>	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
<b>MARKET TESTING</b>	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
<b>AVAILABILITY</b>	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

## SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: CareVoyant, Inc.	Vendor#: 13289	Dept: DuPage Care Center	Division: Administration
Attn: Kandasamy Pasupathy	Email: pasu@carevoyant.com	Attn: Shauna Berman	Email: shauna.berman@dupagecounty.gov
Address: 3701 Algonquin Road, Suite 530	City: Rolling Meadows	Address: 400 N. County Farm Road	City: Wheaton
State: IL	Zip: 60008	State: IL	Zip: 60187
Phone: 847-925-9148	Fax:	Phone: 630-784-4261	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: CareVoyant, Inc.	Vendor#: 13289	Dept: DuPage Care Center	Division:
Attn:	Email:	Attn: Shauna Berman	Email: shauna.berman@dupagecounty.gov
Address: 3701 Algonquin Road, Suite 530	City: Rolling Meadows	Address: 400 N. County Farm Road	City: Wheaton
State: IL	Zip: 60008	State: IL	Zip: 60187
Phone: 847-925-9148	Fax:	Phone: 630-784-4261	Fax:
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): May 1, 2024	Contract End Date (PO25): April 30, 2025
Contract Administrator (PO25): Christine Kliebhan			

**Purchase Requisition Line Details**

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/Activity Code	Unit Price	Extension
1	1	EA		CV Hosting for Large Database	FY24	1200	2000	53807		22,800.00	22,800.00
<b><i>FY is required, assure the correct FY is selected.</i></b>										Requisition Total	\$ 22,800.00

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025. CV hosting for large database and additional licenses for the DuPage Care Center, for the period May 1, 2024 through April 30, 2025, for a total contract not to exceed \$22,800.00, per Other Professional Services.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO. Human Services Committee 02/20/24
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached:     W-9     Vendor Ethics Disclosure Statement

QUOTE

CareVoyant, Inc.  
3701 W. Algonquin Road  
Suite 530  
Rolling Meadows, IL 60008  
(847) 925-9148

Quote: 2024-1-DUP002  
Date: 01/25/2024  
Page 1

Bill To:

DuPage Care Center  
Attn: Shauna Berman  
400 N County Farm Road  
Wheaton, IL 60187

Ship To:

DuPage Care Center  
Attn: Shauna Berman  
400 N County Farm Road  
Wheaton, IL 60187

Customer ID:	Sales Person ID	Purchase Order#		
DUP002	CV		<b>Payment Terms: Due Upon Receipt</b>	
Qty	Item#	Description	Unit Amount	Extended Amount

12	MHOSTLTC	CV Monthly Hosting: 05/01/2024-04/30/2025	\$1,900.00	\$22,800.00
1	MHOSTLTC	for historical access, Large database,		
1	MHOSTLTC	Eight Named User License(s).		

Order Total	\$22,800.00
Discount	\$0.00
Misc Charges	\$0.00
Tax	<u>\$0.00</u>
Total	\$22,800.00



# CareVoyant

## CareVoyant CV Hosting Quote

<b>Client:</b> DuPage Care Center	<b>Date:</b> 03/29/22
	<b>Phone:</b> 630-784-4261
	<b>Email:</b> <a href="mailto:Shauna.Berman@dupa">Shauna.Berman@dupa</a>
<b>Address:</b> 400 N Country Farm Road Wheaton, IL 60187	<b>Email:</b> <a href="mailto:gecounty.gov">gecounty.gov</a>
<b>Attention:</b> Shauna Berman	<b>Quote Expiration:</b> 04/30/22

		Purchase Price	
QTY	CAREVOYANT CONFIGURATION	PRICE	TOTAL
12	CareVoyant Historical Access on CV Hosting 8 Named Users, Large Database	\$1,900.00	\$22,800.00
CV Hosting Fee			\$22,800.00

Price list is confidential (not to be discussed nor shared with any party other than the parties identified above and CareVoyant staff)





# Required Vendor Ethics Disclosure Statement

Date: 01/23/2024

Failure to complete and return this form may result in delay or cancellation of the County's Contractual Obligation.

Bid/Contract/PO #: \_\_\_\_\_

Company Name: <b>CareVoyant, Inc</b>	Company Contact: <b>Kandasamy Pasupathy</b>
Contact Phone: <b>847-925-9148</b>	Contact Email: <b>pasu@carevoyant.com</b>

### The DuPage County Procurement Ordinance requires the following written disclosures prior to award:

1. Every contractor, union, or vendor that is seeking or has previously obtained a contract, change orders to one (1) or more contracts, or two (2) or more individual contracts with the county resulting in an aggregate amount at or in excess of \$25,000, shall provide to Procurement Services Division a written disclosure of all political campaign contributions made by such contractor, union, or vendor within the current and previous calendar year to any incumbent county board member, county board chairman, or countywide elected official whose office the contract to be awarded will benefit. The contractor, union or vendor shall update such disclosure annually during the term of a multi-year contract and prior to any change order or renewal requiring approval by the county board. For purposes of this disclosure requirement, "contractor or vendor" includes owners, officers, managers, lobbyists, agents, consultants, bond counsel and underwriters counsel, subcontractors and corporate entities under the control of the contracting person, and political action committees to which the contracting person has made contributions.

**NONE (check here) - If no contributions have been made**

Recipient	Donor	Description (e.g. cash, type of item, in-kind services, etc.)	Amount/Value	Date Made

2. All contractors and vendors who have obtained or are seeking contracts with the county shall disclose the names and contact information of their lobbyists, agents and representatives and all individuals who are or will be having contact with county officers or employees in relation to the contractor bid and shall update such disclosure with any changes that may occur.

**NONE (check here) - If no contacts have been made**

Lobbyists, Agents and Representatives and all individuals who are or will be having contact with county officers or employees in relation to the contract or bid	Telephone	Email

A contractor or vendor that knowingly violates these disclosure requirements is subject to penalties which may include, but are not limited to, the immediate cancellation of the contract and possible disbarment from future county contracts.

### Continuing disclosure is required, and I agree to update this disclosure form as follows:

- If information changes, within five (5) days of change, or prior to county action, whichever is sooner
- 30 days prior to the optional renewal of any contract
- Annual disclosure for multi-year contracts on the anniversary of said contract
- With any request for change order except those issued by the county for administrative adjustments

The full text for the county's ethics and procurement policies and ordinances are available at:

<http://www.dupageco.org/CountyBoard/Policies/>

I hereby acknowledge that I have received, have read, and understand these requirements.

Authorized Signature Signature on File

Printed Name Kandasamy Pasupathy

Title President

Date 01/23/2024

Attach additional sheets if necessary. Sign each sheet and number each page. **PAGE 1 OF 1 (total number of pages)**



## Care Center Requisition Under \$30,000

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
[www.dupagecounty.gov](http://www.dupagecounty.gov)

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**File #:** 24-0847

**Agenda Date:** 3/5/2024

**Agenda #:** 7.A.

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Procurement Review Comprehensive Checklist  
 Procurement Services Division  
 This form must accompany all Purchase Order Requisitions

**SECTION 1: DESCRIPTION**

<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#: 24-0749	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS: OTHER	INITIAL TERM TOTAL COST: \$17,000.00
COMMITTEE: HUMAN SERVICES	TARGET COMMITTEE DATE: 03/05/2024	PROMPT FOR RENEWAL: 3 MONTHS	CONTRACT TOTAL COST WITH ALL RENEWALS: \$17,000.00
	CURRENT TERM TOTAL COST: \$17,000.00	MAX LENGTH WITH ALL RENEWALS: ONE YEAR	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Redsail Technologies, LLC	VENDOR #: 34012	DEPT: DuPage Care Center	DEPT CONTACT NAME: Jonathan Klimek
VENDOR CONTACT: Brent Thomasson	VENDOR CONTACT PHONE: 864-253-8632	DEPT CONTACT PHONE #: 630-784-4275	DEPT CONTACT EMAIL: Jonathan.klimek@dupageco.org
VENDOR CONTACT EMAIL: brent.thomasson@redsailtechnologies.com	VENDOR WEBSITE:	DEPT REQ #: 7437	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Software and software maintenance for the data system in the Pharmacy Department, for the period May 1, 2024 through April 30, 2025, for a total contract not to exceed \$17,000.00. Also to include miscellaneous other charges as necessary, per 55 ILCS 5/5-1022 "COMPETITIVE BIDS" (D) IT/TELECOM PURCHASES UNDER \$35,000.00			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished The Pharmacy Department uses a data system to electronically store prescriptions. The system keeps track of patient information, inventory and billing. DPCC purchases a maintenance agreement each year to keep the system up to date on pricing, clinical information and regulatory information. The software allows new prescriptions and filling refills quick and easy. HIPAA-compliant system makes processing claims, reporting, managing inventory and maintaining and updating data easier. Redsail offers a range of integrated services and systems that enhance work flow and patient safety in our pharmacy while providing the comprehensive management tools necessary for better service and profitability. The DPCC Pharmacy has utilized the data system since 1998 with little to no interruption in service. The system is flexible enough to interface with new technology and is adaptable with the needs to our inpatient and outpatient needs of our Pharmacy Department.			

**SECTION 2: DECISION MEMO REQUIREMENTS**

DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required. PER 55 ILCS 5/5-1022 'COMPETITIVE BIDS' (D) IT/TELECOM PURCHASES UNDER \$35,000.00
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.

**SECTION 3: DECISION MEMO**

STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact.
SOURCE SELECTION	Describe method used to select source.
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action).

## SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

<b>JUSTIFICATION</b>	Select an item from the following dropdown menu to justify why this is a sole source procurement.
<b>NECESSITY AND UNIQUE FEATURES</b>	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific.
<b>MARKET TESTING</b>	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not.
<b>AVAILABILITY</b>	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted.

## SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: Redsail Technologies, LLC	Vendor#: 34012	Dept: DuPage Care Center	Division: Pharmacy
Attn: Brent Thomasson	Email: Brent.thomasson@redsailtechnologies.com	Attn: Jonathan Klimek	Email: jonathan.klimek@dupageco.org
Address: 201 W. St. John Street	City: Spartanburg	Address: 400 N. County Farm Road	City: Wheaton
State: SC	Zip: 29306	State: IL	Zip: 60187
Phone: 800-845-7558	Fax:	Phone: 630-784-4275	Fax:
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Redsail Technologies, LLC	Vendor#: 34012	Dept: DuPage Care Center	Division: Pharmacy
Attn:	Email:	Attn:	Email:
Address: PO Box	City: Charlotte	Address: 400 N. County Farm Road	City: Wheaton
State: NC	Zip: 28289	State: IL	Zip: 60187
Phone: 800-845-7558	Fax:	Phone:	Fax:
<b>Shipping</b>		<b>Contract Dates</b>	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): May 1, 2024	Contract End Date (PO25): April 30, 2025
Contract Administrator (PO25): Christine Kliebhan			



**Purchase Requisition Line Details**

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/Activity Code	Unit Price	Extension
1	1	EA		Software & maintenance for the Data System in the Pharmacy Department	FY24	1200	2085	53250		4,000.00	4,000.00
2	1	EA		Software & maintenance for the Data System in the Pharmacy Department	FY24	1200	2085	53807		8,000.00	8,000.00
3	1	EA		Software & maintenance for the Data System in the Pharmacy Department	FY25	1200	2085	53250		3,000.00	3,000.00
4	1	EA		Software & maintenance for the Data System in the Pharmacy Department	FY25	1200	2085	53807		2,000.00	2,000.00
<b><i>FY is required, assure the correct FY is selected.</i></b>										Requisition Total	\$ 17,000.00

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025. Software and software maintenance for the data system in the Pharmacy Department, for the period May 1, 2024 through April 30, 2025, for a total contract not to exceed \$17,000.00. Also to include miscellaneous other charges as necessary, per 55 ILCS 5/5-1022 "COMPETITIVE BIDS" (D) IT/TELECOM PURCHASES UNDER \$35,000.00
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO.
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached:     W-9     Vendor Ethics Disclosure Statement



# Memorandum

*From: Ashley Ray*  
*Date: February 12, 2024*  
**QUOTE FOR 2024-2025**

Please find below the charges that we show you are currently being billed for. Please keep in mind as items (software/ hardware) are added they would not be reflected below. These prices are firm only if no changes are made.

DUPAGE COUNTY CONV. CNTR.	7569IL	SOFTWARE MAINTENANCE	\$3164.00/ YR
		PRICE UPDATES	\$150.00/ QTR
		CLINICAL UPDATES	\$190.00/ QTR
		AUTOMED YRLY SOFTWARE	\$150.00/ YR
		DRUG IMAGES/ IMPRINTS	\$60.00/ QTR
		ARCHITEXT SOFT UPDATES	\$150.00/ YR
		POINT CLICK CARE	\$106.25/ MO
	7569	WEBCONNECT SOFTWARE	\$1050.00/ YR
DUPAGE COUNTY SVR. PHCY	7569I1	SOFTWARE MAINTENANCE	\$865.00/ YR
		PRICE UPDATES	\$75.00/ QTR
		CLINICALUPDATES	\$75.00/ QTR
		ARCHITEXT SOFT UPDATES	\$150.00/ YR
	7569S1	POS SOFTWARE MAINTENANCE	\$568.00/ YR
	7569V1	IVR SOFTWARE MAINTENANCE	\$630.00/ YR



**Powerline transactions are billed at .076/transaction, however, there are some plans that will have a higher rate due to the fact that they go through a third party and not directly through QS/1. These third parties bill QS/1 therefore we pass those charges along to you.**

**QS/1® | INTEGRA® | POWERLINE® | PUBLIQ®**

RedSail Technologies, LLC | 201 W. Saint John St., Spartanburg, SC 29306 | 800.845.7558 | [redsailtechnologies.com](http://redsailtechnologies.com)



# Required Vendor Ethics Disclosure Statement

Date: 2.13.2024

Failure to complete and return this form may result in delay or cancellation of the County's Contractual Obligation.

Bid/Contract/PO #: \_\_\_\_\_

Company Name: <u>RedSail Technologies, LLC</u>	Company Contact: <u>Brent Thomasson</u>
Contact Phone: <u>864-253-8600</u>	Contact Email: <u>brent.thomasson@redsailtechnologies.com</u>

### The DuPage County Procurement Ordinance requires the following written disclosures prior to award:

1. Every contractor, union, or vendor that is seeking or has previously obtained a contract, change orders to one (1) or more contracts, or two (2) or more individual contracts with the county resulting in an aggregate amount at or in excess of \$25,000, shall provide to Procurement Services Division a written disclosure of all political campaign contributions made by such contractor, union, or vendor within the current and previous calendar year to any incumbent county board member, county board chairman, or countywide elected official whose office the contract to be awarded will benefit. The contractor, union or vendor shall update such disclosure annually during the term of a multi-year contract and prior to any change order or renewal requiring approval by the county board. For purposes of this disclosure requirement, "contractor or vendor" includes owners, officers, managers, lobbyists, agents, consultants, bond counsel and underwriters counsel, subcontractors and corporate entities under the control of the contracting person, and political action committees to which the contracting person has made contributions.

NONE (check here) - If no contributions have been made

Recipient	Donor	Description (e.g. cash, type of item, in-kind services, etc.)	Amount/Value	Date Made

2. All contractors and vendors who have obtained or are seeking contracts with the county shall disclose the names and contact information of their lobbyists, agents and representatives and all individuals who are or will be having contact with county officers or employees in relation to the contractor bid and shall update such disclosure with any changes that may occur.

NONE (check here) - If no contacts have been made

Lobbyists, Agents and Representatives and all individuals who are or will be having contact with county officers or employees in relation to the contract or bid	Telephone	Email

A contractor or vendor that knowingly violates these disclosure requirements is subject to penalties which may include, but are not limited to, the immediate cancellation of the contract and possible disbarment from future county contracts.

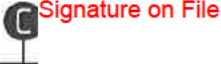
### Continuing disclosure is required, and I agree to update this disclosure form as follows:

- If information changes, within five (5) days of change, or prior to county action, whichever is sooner
- 30 days prior to the optional renewal of any contract
- Annual disclosure for multi-year contracts on the anniversary of said contract
- With any request for change order except those issued by the county for administrative adjustments

The full text for the county's ethics and procurement policies and ordinances are available at:

<http://www.dupageco.org/CountyBoard/Policies/>

I hereby acknowledge that I have received, have read, and understand these requirements.

Authorized Signature  Signature on File

Printed Name Brent Thomasson

Title SVP and Corporate Controller

Date 2.13.2024

Attach additional sheets if necessary. Sign each sheet and number each page. PAGE 1 OF 1 (total number of pages)





## Development Requisition under \$30,000

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
[www.dupagecounty.gov](http://www.dupagecounty.gov)

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**File #:** 24-0803

**Agenda Date:** 3/5/2024

**Agenda #:** 6.A.

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Procurement Review Comprehensive Checklist  
 Procurement Services Division  
 This form must accompany all Purchase Order Requisitions

<b>SECTION 1: DESCRIPTION</b>			
<i>General Tracking</i>		<i>Contract Terms</i>	
FILE ID#:	RFP, BID, QUOTE OR RENEWAL #:	INITIAL TERM WITH RENEWALS:	INITIAL TERM TOTAL COST: \$19,263.00
COMMITTEE: DEVELOPMENT	TARGET COMMITTEE DATE: 03/05/2024	PROMPT FOR RENEWAL:	CONTRACT TOTAL COST WITH ALL RENEWALS:
	CURRENT TERM TOTAL COST: \$19,263.00	MAX LENGTH WITH ALL RENEWALS:	CURRENT TERM PERIOD: INITIAL TERM
<i>Vendor Information</i>		<i>Department Information</i>	
VENDOR: Harris Govern	VENDOR #: 28530	DEPT: Building & Zoning	DEPT CONTACT NAME: Marla Flynn
VENDOR CONTACT: Eric Martineau	VENDOR CONTACT PHONE: 450-805-2314	DEPT CONTACT PHONE #: X6789	DEPT CONTACT EMAIL: Marla.Flynn@dupagecounty.gov
VENDOR CONTACT EMAIL: emartineau@harriscomputer.com	VENDOR WEBSITE:	DEPT REQ #:	
<i>Overview</i>			
DESCRIPTION Identify scope of work, item(s) being purchased, total cost and type of procurement (i.e., lowest bid, RFP, renewal, sole source, etc.). Annual maintenance & support for the GOVERN software system for the period of April 1, 2024 through March 31, 2025, in the amount of \$19,263.00 (B&Z \$10,702.00, DOT \$6,421.00 and PW \$2,140.00).			
JUSTIFICATION Summarize why this procurement is necessary and what objectives will be accomplished The GOVERN system is unique to DuPage County and allows for review of all historical permits, impact fees, code violations associated with the County permitting process for Building & Zoning, Public Works and Division of Transportation. While we have migrated the current process to another program, it is necessary to be able to access the historical records of ongoing permits.			

<b>SECTION 2: DECISION MEMO REQUIREMENTS</b>	
DECISION MEMO NOT REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is not required. SOLE SOURCE PER DUPAGE ORDINANCE, SECTION 2-350 (MUST FILL OUT SECTION 4)
DECISION MEMO REQUIRED	Select an item from the following dropdown menu to identify why a Decision Memo (Section 3) is required.

<b>SECTION 3: DECISION MEMO</b>	
STRATEGIC IMPACT	Select an item from the following dropdown menu of County's strategic priorities that this action will most impact.
SOURCE SELECTION	Describe method used to select source.
RECOMMENDATION AND TWO ALTERNATIVES	Describe staff recommendation and provide justification. Identify at least 2 other options to accomplish this request, including status quo, (i.e., take no action).

## SECTION 4: SOLE SOURCE MEMO/JUSTIFICATION

<b>JUSTIFICATION</b>	Select an item from the following dropdown menu to justify why this is a sole source procurement. SOFTWARE MANUFACTURER AND SOLE MAINTENANCE/UPDATE PROVIDER
<b>NECESSITY AND UNIQUE FEATURES</b>	Describe the product or services that are not available from other vendors. Explain necessary and unique features or services. Attach letters from manufacturer, letters from distributor, warranties, licenses, or patents as needed. Be specific. The software was specifically written for DuPage County to allow for review, issuance and tracking of all permits and impact fees, as well as code violations and all accounts receivable functions associated with the permitting process. The permitting process has been migrated to an online process with another program but it is necessary to be able to review historical permits that might be ongoing. This program is used by Building & Zoning, Public Works and Division of Transportation.
<b>MARKET TESTING</b>	List and describe the last time the market has been tested on the applicability of the sole source. If it has not been tested over the last 12 months, explain why not. The system is unique to DuPage County and was designed for DuPage County by this vendor. Harris Govern is the only vendor able to provide support and maintenance for the own system.
<b>AVAILABILITY</b>	Describe steps taken to verify that these features are not available elsewhere. Included a detailed list of all products or services by brand/manufacturer examined and include names, phone numbers, and emails of people contacted. Extensive research of the other comparable systems was performed before this vendor was selected.

## SECTION 5: Purchase Requisition Information

<i>Send Purchase Order To:</i>		<i>Send Invoices To:</i>	
Vendor: N Harris Computer Corporation DBA Harris Govern	Vendor#: 28530	Dept: Building & Zoning	Division:
Attn: Eric Martineau	Email: emartineau@harriscomputer.com	Attn: Marla Flynn	Email: Marla.Flynn@dupagecounty.gov
Address: 1 Antares Dr, Suite 400	City: Ottawa	Address: 421 N County Farm Rd	City: Wheaton
State: ON K2E 8C4 Canada	Zip:	State: IL	Zip: 60187
Phone: 613-226-5511	Fax:	Phone: 630-407-6789	Fax: 630-407-6702
<i>Send Payments To:</i>		<i>Ship to:</i>	
Vendor: Harris Govern	Vendor#: 28530	Dept:	Division:
Attn:	Email:	Attn:	Email:
Address: PO Box 74007259	City: Chicago	Address:	City:
State: IL	Zip: 60674	State:	Zip:
Phone:	Fax:	Phone:	Fax:
Shipping		Contract Dates	
Payment Terms: PER 50 ILCS 505/1	FOB: Destination	Contract Start Date (PO25): Apr 1, 2024	Contract End Date (PO25): Mar 31, 2025
Contract Administrator (PO25):			

**Purchase Requisition Line Details**

LN	Qty	UOM	Item Detail (Product #)	Description	FY	Company	AU	Acct Code	Sub-Accts/Activity Code	Unit Price	Extension
1	1	EA		Annual Maint & Support for Govern Software - 10 Users	FY24	1100	2810	53807		10,702.00	10,702.00
2	1	EA		Annual Maint & Support for Govern Software - 6 Users	FY24	1500	3500	53807		6,421.00	6,421.00
3	1	EA		Govern Maint & Support for Govern Software - 2 Users	FY24	2000	2665	53807		2,140.00	2,140.00
<b><i>FY is required, assure the correct FY is selected.</i></b>										Requisition Total	\$ 19,263.00

<i>Comments</i>	
HEADER COMMENTS	Provide comments for P020 and P025.
SPECIAL INSTRUCTIONS	Provide comments for Buyer or Approver (not for P020 and P025). Comments will not appear on PO.
INTERNAL NOTES	Provide comments for department internal use (not for P020 and P025). Comments will not appear on PO. Development, Public Works & Transportation Committees 3/5/2024
APPROVALS	Department Head signature approval for procurements under \$15,000. Procurement Officer Approval for ETSB.

The following documents have been attached:     W-9     Vendor Ethics Disclosure Statement





Invoice  
Date  
Page

GOVMN0000247  
02/15/2024  
1 of 1

Remit To: Harris Govern;  
PO Box 74007259  
Chicago, IL 60674-7259

Bill To
DuPage County (IL) Marla Flynn 421 North County Farm Road DuPage Center WHEATON, IL 60187 United States

Ship To
DuPage County (IL) 421 North County Farm Road DuPage Center WHEATON, IL 60187 United States

PO Number	Customer No.	Salesperson ID	Shipping Method	Payment Terms
	DUP100		LOCAL DELIVERY	MN APR

Ordered	Item Number	Description	Unit Price	Ext Price
1.00	MAINTENANCE	Land Management WD: 4/1/2024 to 3/31/2025 <span style="color: blue;">B&amp;Z</span>	US\$10,702.00	US\$10,702.00
1.00	MAINTENANCE	Land Management WD: 4/1/2024 to 3/31/2025 <span style="color: blue;">DOT</span>	US\$6,421.00	US\$6,421.00
1.00	MAINTENANCE	Land Management WD: 4/1/2024 to 3/31/2025 <span style="color: blue;">PW</span>	US\$2,140.00	US\$2,140.00
Please Note: Payment is due at the start of the maintenance term			Subtotal	US\$19,263.00
			Misc	US\$0.00
			Tax	US\$0.00
			Freight	US\$0.00
			Trade Discount	US\$0.00
Invoice Questions? Please call Evelyn Campbell at 1-888-847-7747 OR e-mail ar_govern@harriscomputer.com			Total	US\$19,263.00



Harris Govern  
2721 Council Tree Ave, Suite 248  
Fort Collins, CO 80525  
Sales Phone: (972) 881-1858  
Support Phone: (972) 265-7300

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February 19, 2024

Marla Flynn, Financial Analyst II  
DuPage County Building and Zoning Department  
Building Division  
421 N. County Farm Road  
Wheaton, IL 60187

To Whom It May Concern,

This letter advises that Harris Govern (formerly MS Govern, a division of Harris Computer Systems) is the sole source provider for supporting, maintaining, and licensing the Govern Software products. The source code for these products is proprietary and unavailable to any other entity. The design of the software is unique, and Harris Govern is uniquely qualified to provide support, fixes, and enhancements for it.

Sincerely,

A small, handwritten signature in dark ink, appearing to be "Mark Tesreau", is positioned below the word "Sincerely,".

Mark Tesreau  
Vice President, Support Services



# Required Vendor Ethics Disclosure Statement

Failure to complete and return this form may result in delay or cancellation of the County's Contractual Obligation.

Date: Feb 19, 2024

Bid/Contract/PO #: \_\_\_\_\_

Company Name: Harris Govern	Company Contact: Mark Tesreau
Contact Phone: (800) 806-7896	Contact Email: mtesreau@harriscomputer.com

### The DuPage County Procurement Ordinance requires the following written disclosures prior to award:

1. Every contractor, union, or vendor that is seeking or has previously obtained a contract, change orders to one (1) or more contracts, or two (2) or more individual contracts with the county, shall provide to Procurement Services Division a written disclosure of all political campaign contributions made by such contractor, union, or vendor within the current and previous calendar year to any incumbent county board member, county board chairman, or countywide elected official whose office the contract to be awarded will benefit. The contractor, union or vendor shall update such disclosure annually during the term of a multi-year contract and prior to any change order or renewal requiring approval by the county board. For purposes of this disclosure requirement, "contractor or vendor" includes owners, officers, managers, lobbyists, agents, consultants, bond counsel and underwriters counsel, subcontractors and corporate entities under the control of the contracting person, and political action committees to which the contracting person has made contributions.

**NONE (check here) - If no contributions have been made**

Recipient	Donor	Description (e.g. cash, type of item, in-kind services, etc.)	Amount/Value	Date Made

2. All contractors and vendors who have obtained or are seeking contracts with the county shall disclose the names and contact information of their lobbyists, agents and representatives and all individuals who are or will be having contact with county officers or employees in relation to the contractor bid and shall update such disclosure with any changes that may occur.

**NONE (check here) - If no contacts have been made**

Lobbyists, Agents and Representatives and all individuals who are or will be having contact with county officers or employees in relation to the contract or bid	Telephone	Email

A contractor or vendor that knowingly violates these disclosure requirements is subject to penalties which may include, but are not limited to, the immediate cancellation of the contract and possible disbarment from future county contracts.

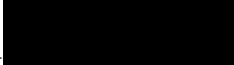
### Continuing disclosure is required, and I agree to update this disclosure form as follows:

- If information changes, within five (5) days of change, or prior to county action, whichever is sooner
- 30 days prior to the optional renewal of any contract
- Annual disclosure for multi-year contracts on the anniversary of said contract
- With any request for change order except those issued by the county for administrative adjustments

### The full text for the county's ethics and procurement policies and ordinances are available at:

[http://www.dupagecounty.gov/government/county\\_board/ethics\\_at\\_the\\_county/](http://www.dupagecounty.gov/government/county_board/ethics_at_the_county/)

### I hereby acknowledge that I have received, have read, and understand these requirements.

Authorized Signature 

Printed Name Mark Tesreau

Title Vice President, Support Services

Date Feb 19, 2024

Attach additional sheets if necessary. Sign each sheet and number each page. Page 1 of 1 (total number of pages)



# Presentation

421 N. COUNTY FARM  
ROAD  
WHEATON, IL 60187  
[www.dupagecounty.gov](http://www.dupagecounty.gov)

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**File #:** 24-0941

**Agenda Date:** 3/5/2024

**Agenda #:** 8.A.

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# DUPAGECOUNTY

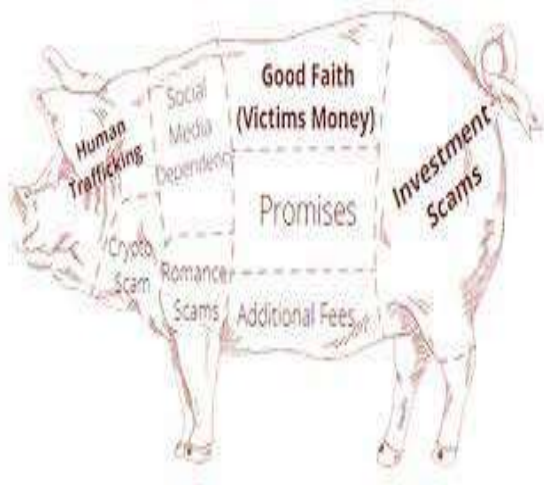
Domain Seizure Project



# Domain Seizure Project Summary

**Project:** Domain Seizure Project

**Project Owner:** State's Attorney and United States Secret Service



**Project Background:** The Secret Service and the DuPage County SAO worked together on a sting to catch three individuals involved in a "Pig Butchering" scam against citizens of DuPage County. A Pig Butchering scam consists of a fraudster posing as a friendly person or romantic interest to deceive individuals into providing funds for fictitious emergencies, investments, employment opportunities, and other schemes, only to disappear with the money after they receive it.

The IT department's Network and Web Services teams were asked to host a website with a splash page for 90 days to redirect victims of the crime to the Secret Service for help.



**DUPAGE**COUNTY



# Pig Butchering Scam

## How the Scam Works – 10 Simple Steps:

### 1. Create a fake identity

Pig butchers often begin by creating a phony online persona, typically accompanied by an alluring photo (which itself might have been stolen) and images that convey a glamorous lifestyle.

### 2. Initiate contact

Once they've got an online profile, fraudsters send messages to people on dating or social networking sites.

### 3. Win the trust of the target

The next step is starting a conversation with a potential victim to gain their trust.

### 4. Sign them up

Before long, the swindlers will pivot to a discussion of investing. They'll claim their purported investing successes, perhaps sharing screenshots of a brokerage account with gaudy numbers. They'll try to convince targets to open an account at their online brokerage.

### 5. Get them to put real money into the fake account

Once marks agree to learn investing tricks, the scammers will "help" them with the investment process. The fraudsters will explain how to wire money from their bank account to a crypto wallet and eventually to the fake brokerage.

[SOURCE: propublica.org](https://www.propublica.org)



**DUPAGE**COUNTY



# Pig Butchering Scam

## 6. “Prove” that it’s legitimate

Scammers often allay initial doubts by letting targets withdraw money once or twice to convince them that the process is trustworthy.

## 7. Manipulate them into investing more

Pig butchering guides offer insights on exploiting marks’ emotional and financial vulnerabilities to manipulate them into depositing more and more funds.

## 8. Cut them off

Once targets reach a limit and become unwilling to deposit more funds, their seeming investment success suddenly stops. Withdrawals become impossible, or they suffer a big “loss” that wipes out their entire investment.

## 9. Use their desperation to your advantage

Scammers will then turn the screws of manipulation tighter by telling victims there’s a potential solution: If they deposit more cash into the brokerage, they can regain what they lost.

## 10. Taunt and depart

Once the targets know they’ve been swindled, the fraudsters often insult or taunt them. They soon go silent, and the websites of their phony brokerages stop working.

[SOURCE: propublica.org](https://www.propublica.org)



**DUPAGE**COUNTY





# Domain Seizure Project

## Project Highlights:

- The project targeted three offenders and 352 unique fraudulent domains. Offenders were from outside the country. As a result, no legal action could be taken against them, but the splash page saved close to 18,000 visitors from being scammed.
- There were 17,800 page visits to the splash page.
- Involved agencies: State's Attorney, Secret Service Cyber Fraud Task Force, and Information Technology Department (Web Team [Debbie Deacy], NSG [Joe Hamlin]).
- It is a first-of-its-kind operation for the Chicago Secret Service Office (includes the United States Secret Service, Chicago Field Office, and Cyber Fraud Task Force) and the State of Illinois.
- While no prosecution or arrests were made, all 352 domains used to defraud our citizens were seized and taken down. This costs the offenders time and money.
- The seized domains were returned to the Namecheap domain registrar.





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Thank you!

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