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 for GSA Advantage! is: http://www.gsaadvantage.gov

WORLDWIDE FEDERAL SUPPLY SCHEDULE CONTRACT

SCHEDULE TITLE: General Purpose Commercial Information Technology Equipment, Software, and Services

FSC GROUP: 70

CONTRACT NUMBER: GS-35F-131DA

CONTRACT PERIOD: January 6, 2016 – January 6, 2021

CONTRACTOR:

Collector Systems, LLC
169 Hudson Street
New York, NY 10013
(212) 431-0897
www.collectorsystems.com

CONTRACTOR’S ADMINISTRATION SOURCE:

Eric Kahan, President
Collector Systems, LLC
169 Hudson Street
New York, NY 10013-2154
T: (212) 431-0897 x112
E: ekahan@collectorsystems.com

BUSINESS SIZE: Small

DUNS: 80-5268161
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CUSTOMER INFORMATION

1a. Awarded Special Item Numbers (SINs)

<table>
<thead>
<tr>
<th>SIN</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>132-40</td>
<td>Cloud Computing Services</td>
</tr>
<tr>
<td>132-34</td>
<td>Maintenance of Software</td>
</tr>
</tbody>
</table>

1b. Lowest Price Model Number and Price for each SIN

See Price List

1c. Hourly Rates (Services only)

See Price List

2. Maximum Order

<table>
<thead>
<tr>
<th>SIN</th>
<th>Maximum Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>132-40</td>
<td>$500,000.00</td>
</tr>
<tr>
<td>132-34</td>
<td>$500,000.00</td>
</tr>
</tbody>
</table>

3. Minimum Order

<table>
<thead>
<tr>
<th>SIN</th>
<th>Minimum Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>132-40</td>
<td>$100.00</td>
</tr>
<tr>
<td>132-34</td>
<td>$100.00</td>
</tr>
</tbody>
</table>

4. Geographic Coverage

Worldwide
5. **Point(s) of Production**

Not Applicable

6. **Discount from List Prices or Statement of Net Price**

Basic discount of 5% from the GSA Net Prices are shown on the attached GSA Pricelist. Negotiated discount has been applied and the IFF has been added. For calculation of the GSA Schedule price see attached Price List.

7. **Quantity Discount(s)**

Collector Systems will offer an additional 10% discount for orders over $300,000.00.

8. **Prompt Payment Terms**

Not Applicable

9a. **Government Purchase Cards are accepted for payments equal to or less than the micro-purchase threshold.**

9b. **Government Purchase Cards are accepted above the micro-purchase threshold.**

10. **Foreign Items**

Not Applicable

11a. **Time of Delivery**

Not Applicable

11b. **Expedited Delivery**

Items available for expedited delivery are noted in the price list.

11c. **Overnight and 2-day Delivery**
Overnight and 2-day delivery are available. Contact the Contractor for rates.

11d. Urgent Requirements

Agencies can contact the Contractor to affect a faster delivery. Customers are encouraged to contact the Contractor for the purpose of requested accelerated delivery.

12. Fob Point

Destination

13a. Ordering Address

Collector Systems, LLC
169 Hudson Street
New York, NY 10013
T: (212) 431-0897

13b. Ordering Procedures

Ordering activities shall use the ordering procedures described in Federal Acquisition Regulation 8.405-3 when placing an order or establishing a BPA for supplies or services. The ordering procedures, information on Blanket Purchase Agreements (BPA’s) and a sample BPA can be found at the GSA Acquisition website under Purchasing Programs (http://www.gsa.gov/portal/category/100136)

14. Payment Address

Collector Systems, LLC
169 Hudson Street
New York, NY 10013

15. Warranty Provision

Not Applicable
16. Export Packing Charges

Not Applicable

17. Terms and Conditions of Government Purchase Card Acceptance

None

18. Terms and Conditions of Rental, Maintenance, and Repair

Not Applicable

19. Terms and Conditions of Installation

Not Applicable

20. Terms and Conditions of Repair Parts

Not Applicable

20a. Terms and Conditions for Any Other Service

Not Applicable

21. List of Service and Distribution Points

Not Applicable

22. List of Participating Dealers

Not Applicable

23. Preventive Maintenance

Not Applicable
24a. Special Attributes

Not Applicable

24b. Section 508 Compliance Information

Not Applicable

25. Data Universal Number System (DUNS) Number

80-5268161

26. Contractor Has Registered in the System for Award Management (SAM) Database

Collector Systems has registered in the System for Award Management (SAM) Database.

The CAGE code is 6QX10
TERM AND CONDITIONS FOR CLOUD COMPUTING SERVICES (132-40)

****NOTE: If offering related IT Professional Services over and above initial onboarding and training, reference SIN 132-51, per Guidance to Ordering Activities on Professional services below.

****NOTE: This new SIN presents a clear way for Contractors to provide cloud computing services according to NIST definitions and principles within the scope of today’s technology and standards with a secondary goal of accommodating ongoing technical advances in cloud computing.

1. SCOPE
The prices, terms and conditions stated under Special Item Number (SIN) 132-40 Cloud Computing Services apply exclusively to Cloud Computing Services within the scope of this Information Technology Schedule.

This SIN provides ordering activities with access to technical services that run in cloud environments and meet the NIST Definition of Cloud Computing Essential Characteristics. Services relating to or impinging on cloud that do not meet all NIST essential characteristics should be listed in other SINs.

The scope of this SIN is limited to cloud capabilities provided entirely as a service. Hardware, software and other artifacts supporting the physical construction of a private or other cloud are out of scope for this SIN. Currently, an Ordering Activity can procure the hardware and software needed to build on premise cloud functionality, through combining different services on other IT Schedule 70 SINs (e.g. 132-51).

Sub-categories in scope for this SIN are the three NIST Service Models: Software as a Service (SaaS), Platform as a Service (PaaS), and Infrastructure as a Service (IaaS). Offerors may optionally select a single sub-category that best fits a proposed cloud service offering. Only one sub-category may be selected per each proposed cloud service offering. Offerors may elect to submit multiple cloud service offerings, each with its own single sub-category. The selection of one of three sub-categories does not prevent Offerors from competing for orders under the other two sub-categories. See service model guidance for advice on subcategory selection.

Sub-category selection within this SIN is optional for any individual cloud service offering, and new cloud computing technologies that do not align with the aforementioned three sub-categories may be included without a sub-category selection so long as they comply with the essential characteristics of cloud computing as outlined by NIST.
See Table 1 for a representation of the scope and sub-categories.

Table 1: Cloud Computing Services SIN

<table>
<thead>
<tr>
<th>SIN Description</th>
<th>Sub-Categories¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Commercially available cloud computing services</td>
<td>1. Software as a Service (SaaS): Consumer uses provider’s applications on cloud infrastructure. Does not manage/control platform or infrastructure. Limited application level configuration may be available.</td>
</tr>
<tr>
<td>• Meets the National Institute for Standards and Technology (NIST) definition of Cloud Computing essential characteristics</td>
<td>2. Platform as a Service (PaaS): Consumer deploys applications onto cloud platform service using provider-supplied tools. Has control over deployed applications and some limited platform configuration but does not manage the platform or infrastructure.</td>
</tr>
<tr>
<td>• Open to all deployment models (private, public, community or hybrid), vendors specify deployment models</td>
<td>3. Infrastructure as a Service (IaaS): Consumer provisions computing resources. Has control over OS, storage, platform, deployed applications and some limited infrastructure configuration, but does not manage the infrastructure.</td>
</tr>
</tbody>
</table>

2. DESCRIPTION OF CLOUD COMPUTING SERVICES AND PRICING

**NOTE TO CONTRACTORS: The information provided below is designed to assist Contractors in qualifying cloud computing services for this SIN and providing complete descriptions and pricing information. This language should NOT be printed as part of the Information Technology Schedule Pricelist; instead, Contractors should respond to each service

¹ Offerors may optionally select the single sub-category that best fits each cloud service offering, per Service Model Guidance, or select no sub-category if the offering does not fit an existing NIST service model.
requirement as it relates to each cloud computing service offered under the contract. There is guidance provided in subsequent sections of the Terms and Conditions to assist in determining how to meet these requirements. This section delineates requirements for submitting a proposal for the Cloud SIN, as well as requirements that apply to Task Orders**

a. Service Description Requirements for Listing Contractors

The description requirements below are in addition to the overall Schedule 70 evaluation criteria described in SCP-FSS-001, SCP-FSS-004 and other relevant publications.

Refer to overall Schedule 70 requirements for timelines related to description and other schedule updates, including but not limited to clauses 552.238-81 – section E and clause I-FSS-600.

Table 2 summarizes the additional Contractor-provided description requirements for services proposed under the Cloud Computing Services SIN. All mandatory description requirements must be complete, and adequate according to evaluation criteria.

In addition, there is one “Optional” reporting descriptions which exists to provide convenient service selection by relevant criteria. Where provided, optional description requirements must be complete and adequate according to evaluation criteria:

- The NIST Service Model provides sub-categories for the Cloud SIN and is strongly encouraged, but not required. The Service Model based sub-categories provide this SIN with a structure to assist ordering activities in locating and comparing services of interest. Contractors may optionally select the single service model most closely corresponding to the specific service offering.

- If a sub-category is selected it will be evaluated with respect to the NIST Service Model definitions and guidelines in “Guidance for Contractors".
# Table 2: Cloud Service Description Requirements

<table>
<thead>
<tr>
<th>#</th>
<th>Description Requirement</th>
<th>Reporting Type</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Provide a brief written description of how the proposed cloud computing services satisfies each individual essential NIST characteristic.</td>
<td>Mandatory</td>
<td>Software as a Service (SaaS): Consumer uses provider’s applications on cloud infrastructure. Does not manage/control platform or infrastructure. Limited application level configuration may be available.</td>
</tr>
<tr>
<td>2.</td>
<td>Select NIST deployment models for the cloud computing service proposed.</td>
<td>Mandatory</td>
<td>Contractors must select at least one NIST deployment model as outlined in NIST Special Publication 800-145 describing how the proposed cloud computing service is deployed. Select multiple deployment models if the service is offered in more than one deployment model. See ‘GUIDANCE FOR CONTRACTORS: NIST Deployment Model’ below in this document for detailed direction on how to best categorize a service for the NIST deployment models.</td>
</tr>
<tr>
<td>3.</td>
<td>Optionally select the most appropriate NIST service model that will be the designated sub-category, or may select no sub-category.</td>
<td>Optional</td>
<td>Contractor may select a single NIST Service model to sub-categorize the service as outlined in NIST Special Publication 800-145. Sub-category selection is optional</td>
</tr>
</tbody>
</table>

All current pricing requirements for Schedule 70, including provision SCP-FSS-001 (Section III Price Proposal), SCP-FSS-004 (Section III Price Proposal), and clause I-FSS-600 Contract Price Lists, apply. At the current time there is no provision for reducing or eliminating standard price list posting requirements to accommodate rapid cloud price fluctuations.

In addition to standard pricing requirements, all pricing models must have the core capability to meet the NIST Essential Cloud Characteristics, particularly with respect to on-demand self-service, while allowing alternate variations at the task order level at agency discretion, pursuant to the guidance on NIST Essential Characteristics.

3. RESPONSIBILITIES OF THE CONTRACTOR
The Contractor shall comply with all laws, ordinances, and regulations (Federal, State, City, or otherwise) covering work of this character.

   a. Acceptance Testing
   Any required Acceptance Test Plans and Procedures shall be negotiated by the Ordering Activity at task order level. The Contractor shall perform acceptance testing of the systems for Ordering Activity approval in accordance with the approved test procedures.

   b. Training
   If training is provided commercially the Contractor shall provide normal commercial installation, operation, maintenance, and engineering interface training on the system. Contractor is responsible for indicating if there are separate training charges.

   c. Information Assurance/Security Requirements
   The Contractor shall meet information assurance/security requirements in accordance with the Ordering Activity requirements at the Task Order level.
d. Related Professional Services
The Contractor is responsible for working with the Ordering Activity to identify related professional services and any other services available on other SINs that may be associated with deploying a complete cloud solution. Any additional substantial and ongoing professional services related to the offering such as integration, migration, and other cloud professional services are out of scope for this SIN.

e. Performance of Cloud Computing Services
The Contractor shall respond to Ordering Activity requirements at the Task Order level with proposed capabilities to Ordering Activity performance specifications or indicate that only standard specifications are offered. In all cases the Contractor shall clearly indicate standard service levels, performance and scale capabilities.

The Contractor shall provide appropriate cloud computing services on the date and to the extent and scope agreed to by the Contractor and the Ordering Activity.

f. Reporting
The Contractor shall respond to Ordering Activity requirements and specify general reporting capabilities available for the Ordering Activity to verify performance, cost and availability.

In accordance with commercial practices, the Contractor may furnish the Ordering Activity/user with a monthly summary Ordering Activity report.

4. RESPONSIBILITIES OF THE ORDERING ACTIVITY
The Ordering Activity is responsible for indicating the cloud computing services requirements unique to the Ordering Activity. Additional requirements should not contradict existing SIN or IT Schedule 70 Terms and Conditions. Ordering Activities should include (as applicable) Terms & Conditions to address Pricing, Security, Data Ownership, Geographic Restrictions, Privacy, SLAs, etc.

Cloud services typically operate under a shared responsibility model, with some responsibilities assigned to the Cloud Service Provider (CSP), some assigned to the Ordering Activity, and others shared between the two. The distribution of responsibilities will vary between providers and across service models.

Ordering activities should engage with CSPs to fully understand and evaluate the shared responsibility model proposed. Federal Risk and Authorization Management Program (FedRAMP) documentation will be helpful regarding the security aspects of shared responsibilities, but operational aspects may require additional discussion with the provider.

a. Ordering Activity Information Assurance/Security Requirements Guidance
i. The Ordering Activity is responsible for ensuring to the maximum extent practicable that each requirement issued is in compliance with the Federal Information Security Management Act (FISMA) as applicable.

ii. The Ordering Activity shall assign a required impact level for confidentiality, integrity and availability (CIA) prior to issuing the initial statement of work.\(^2\) The Contractor must be capable of meeting at least the minimum security requirements assigned against a low-impact information system in each CIA assessment area (per FIPS 200) and must detail the FISMA capabilities of the system in each of CIA assessment area.

iii. Agency level FISMA certification, accreditation, and evaluation activities are the responsibility of the Ordering Activity. The Ordering Activity reserves the right to independently evaluate, audit, and verify the FISMA compliance for any proposed or awarded Cloud Computing Services.

iv. The Ordering Activity has final responsibility for assessing the FedRAMP status of the service, complying with and making a risk-based decision to grant an Authorization to Operate (ATO) for the cloud computing service, and continuous monitoring. A memorandum issued by the Office of Management and Budget (OMB) on Dec 8, 2011 outlines the responsibilities of Executive departments and agencies in the context of FedRAMP compliance.\(^3\)

v. Ordering activities are responsible for determining any additional information assurance and security related requirements based on the nature of the application and relevant mandates.

### b. Deployment Model

If a particular deployment model (Private, Public, Community, or Hybrid) is desired, Ordering Activities are responsible for identifying the desired model(s). Alternately, Ordering Activities could identify requirements and assess Contractor responses to determine the most appropriate deployment model(s).

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c. Delivery Schedule
The Ordering Activity shall specify the delivery schedule as part of the initial requirement. The Delivery Schedule options are found in Information for Ordering Activities Applicable to All Special Item Numbers.

d. Interoperability
Ordering Activities are responsible for identifying interoperability requirements. Ordering Activities should clearly delineate requirements for API implementation and standards conformance.

e. Performance of Cloud Computing Services
The Ordering Activity should clearly indicate any custom minimum service levels, performance and scale requirements as part of the initial requirement.

f. Reporting
The Ordering Activity should clearly indicate any cost, performance or availability reporting as part of the initial requirement.

g. Privacy
The Ordering Activity should specify the privacy characteristics of their service and engage with the Contractor to determine if the cloud service is capable of meeting Ordering Activity requirements. For example, a requirement could be requiring assurance that the service is capable of safeguarding Personally Identifiable Information (PII), in accordance with NIST SP 800-122\(^4\) and OMB memos M-06-16\(^5\) and M-07-16\(^6\). An Ordering Activity will determine what data elements constitute PII according to OMB Policy, NIST Guidance and Ordering Activity policy.

h. Accessibility
The Ordering Activity should specify the accessibility characteristics of their service and engage with the Contractor to determine the cloud service is capable of meeting Ordering Activity requirements. For example, a requirement could require assurance that the service is capable of providing accessibility based on Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d).

i. Geographic Requirements
Ordering activities are responsible for specifying any geographic requirements and engaging with the Contractor to determine that the cloud services offered have the capabilities to meet geographic requirements for all anticipated task orders. Common geographic concerns could include whether

\(^4\) NIST SP 800-122, “Guide to Protecting the Confidentiality of Personally Identifiable Information (PII)”
\(^5\) OMB memo M-06-16: Protection of Sensitive Agency Information
\(^6\) OMB Memo M-07-16: Safeguarding Against and Responding to the Breach of Personally Identifiable Information
service data, processes and related artifacts can be confined on request to the United States and its territories, or the continental United States (CONUS).

**j. Data Ownership and Retrieval and Intellectual Property**

Intellectual property rights are not typically transferred in a cloud model. In general, CSPs retain ownership of the Intellectual Property (IP) underlying their services and the customer retains ownership of its intellectual property. The CSP gives the customer a license to use the cloud services for the duration of the contract without transferring rights. The government retains ownership of the IP and data they bring to the customized use of the service as spelled out in the FAR and related materials.

General considerations of data ownership and retrieval are covered under the terms of Schedule 70 and the FAR and other laws, ordinances, and regulations (Federal, State, City, or otherwise). Because of considerations arising from cloud shared responsibility models, ordering activities should engage with the Contractor to develop more cloud-specific understandings of the boundaries between data owned by the government and that owned by the cloud service provider, and the specific terms of data retrieval.

In all cases, the Ordering Activity should enter into an agreement with a clear and enforceable understanding of the boundaries between government and cloud service provider data, and the form, format and mode of delivery for each kind of data belonging to the government.

The Ordering Activity should expect that the Contractor shall transfer data to the government at the government's request at any time, and in all cases when the service or order is terminated for any reason, by means, in formats and within a scope clearly understood at the initiation of the service. Example cases that might require clarification include status and mode of delivery for:

- Configuration information created by the government and affecting the government’s use of the cloud provider’s service.
- Virtual machine configurations created by the government but operating on the cloud provider’s service.
- Profile, configuration and other metadata used to configure SaaS application services or PaaS platform services.

The key is to determine in advance the ownership of classes of data and the means by which Government owned data can be returned to the Government.

**k. Service Location Distribution**

The Ordering Activity should determine requirements for continuity of operations and performance and engage with the Contractor to ensure that cloud services have adequate service location distribution to meet anticipated requirements. Typical concerns include ensuring that:
- Physical locations underlying the cloud are numerous enough to provide continuity of operations and geographically separate enough to avoid an anticipated single point of failure within the scope of anticipated emergency events.
- Service endpoints for the cloud are able to meet anticipated performance requirements in terms of geographic proximity to service requestors.

Note that cloud providers may address concerns in the form of minimum distance between service locations, general regions where service locations are available, etc.

1. Related Professional Services
Ordering activities should engage with Contractors to discuss the availability of limited assistance with initial setup, training and access to the services that may be available through this SIN.

Any additional substantial and ongoing professional services related to the offering such as integration, migration, and other cloud professional services are out of scope for this SIN. Ordering activities should consult the appropriate GSA professional services schedule.

5. GUIDANCE FOR CONTRACTORS
This section offers guidance for interpreting the Contractor Description Requirements in Table 2, including the NIST essential cloud characteristics, service models and deployment models. This section is not a list of requirements.

Contractor-specific definitions of cloud computing characteristics and models or significant variances from the NIST essential characteristics or models are discouraged and will not be considered in the scope of this SIN or accepted in response to Factors for Evaluation. The only applicable cloud characteristics, service model/subcategories and deployment models for this SIN will be drawn from the NIST 800-145 special publication. Services qualifying for listing as cloud computing services under this SIN must substantially satisfy the essential characteristics of cloud computing as documented in the NIST Definition of Cloud Computing SP 800-145⁷.

Contractors must select deployment models corresponding to each way the service can be deployed. Multiple deployment model designations for a single cloud service are permitted but at least one deployment model must be selected.

In addition, contractors submitting services for listing under this SIN are encouraged to select a subcategory for each service proposed under this SIN with respect to a single principal NIST cloud service model that most aptly characterizes the service. Service model categorization is optional.

Both service and deployment model designations must accord with NIST definitions. Guidance is offered in this document on making the most appropriate selection.

a. NIST Essential Characteristics

General Guidance

NIST’s essential cloud characteristics provide a consistent metric for whether a service is eligible for inclusion in this SIN. It is understood that due to legislative, funding and other constraints that government entities cannot always leverage a cloud service to the extent that all NIST essential characteristics are commercially available. For the purposes of the Cloud SIN, meeting the NIST essential characteristics is determined by whether each essential capability of the commercial service is available for the service, whether or not the Ordering Activity actually requests or implements the capability. The guidance in Table 3 offers examples of how services might or might not be included based on the essential characteristics, and how the Contractor should interpret the characteristics in light of current government contracting processes.

Table 3: Guidance on Meeting NIST Essential Characteristics

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Capability</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-demand self-service</td>
<td>• Ordering activities can directly provision services without requiring Contractor intervention</td>
<td>Government procurement guidance varies on how to implement on-demand provisioning at this time. Ordering activities may approach on-demand in a variety of ways, including “not-to exceed” limits, or imposing monthly or annual payments on what are essentially on demand services.</td>
</tr>
<tr>
<td></td>
<td>• This characteristic is typically implemented via a service console or programming interface for provisioning</td>
<td>Services under this SIN must be capable of true on-demand self-service, and ordering activities and Contractors must negotiate how they implement on demand capabilities in practice at the task order level:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ordering activities must specify their procurement approach and requirements for on-demand service</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Contractors must propose how they intend to meet the approach</td>
</tr>
<tr>
<td><strong>Contractors must certify that on-demand self-service is technically available for their service should procurement guidance become available</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| **Broad Network Access** | • Ordering activities are able to access services over standard agency networks  
• Service can be accessed and consumed using standard devices such as browsers, tablets and mobile phones |
| **Broad network access must be available without significant qualification and in relation to deployment model and security domain of the service**  
**Contractors must specify any ancillary activities, services or equipment required to access cloud services or integrate cloud with other cloud or non—cloud networks and services. For example, a private cloud might require an Ordering Activity to purchase or provide a dedicated router, etc. which is acceptable but should be indicated by the Contractor** |
| **Resource Pooling** | • Pooling distinguishes cloud service from offsite hosting  
• Ordering activities draw resources from a common pool maintained by the Contractor  
• Resources may have general characteristics such as regional location |
| **The cloud service must draw from a pool of resources and provide an automated means for the Ordering Activity to dynamically allocate them**  
**Manual allocation, e.g. manual operations at a physical server farm where Contractor staff configure servers in response to Ordering Activity requests, does not meet this requirement**  
**Similar concerns apply to software and platform models; automated provisioning from a pool is required**  
**Ordering activities may request dedicated physical hardware, software or platform resources to access a private cloud deployment service. However, the provisioned cloud resources must be drawn from a common pool and automatically allocated on request** |
| Rapid Elasticity | • Rapid elasticity is a specific demand-driven case of self-service  
• Procurement guidance for an on-demand self-service applies to rapid elasticity as well, i.e. rapid elasticity must be technically available but ordering activities and Contractors may mutually negotiate other contractual arrangements for procurement and payment  
• ‘Rapid’ should be understood as measured in minutes and hours, not days and weeks  
• Elastic capabilities by manual request, e.g. via a console operation or programming interface call, are required  
• Automated elasticity which is driven dynamically by system load, etc. is optional. Contractors must specify whether automated demand-driven elasticity is available and the general mechanisms that drive the capability |
| --- | --- |
| Measured Service | • Measured service should be understood as a reporting requirement that enables an Ordering Activity to control their use in cooperation with self service  
• Procurement guidance for on-demand self-service applies to measured service as well, i.e. rapid elasticity must be technically available but ordering activities and Contractors may mutually designate other contractual arrangements  
• Regardless of specific contractual arrangements, reporting must indicate actual usage, be continuously available to the Ordering Activity, and provide meaningful metrics appropriate to the service measured.  
• Contractors must specify that measured service is available and the general sort of metrics and mechanisms available. |
Inheriting Essential Characteristics

Cloud services may depend on other cloud services, and cloud service models such as PaaS and SaaS are able to inherit essential characteristics from other cloud services that support them. For example, a PaaS platform service can inherit the broad network access made available by the IaaS service it runs on, and in such a situation would be fully compliant with the broad network access essential characteristic. Services inheriting essential characteristics must make the inherited characteristic fully available at their level of delivery to claim the relevant characteristic by inheritance.

Inheriting characteristics does not require the inheriting provider to directly bundle or integrate the inherited service, but it does require a reasonable measure of support and identification. For example, the Ordering Activity may acquire an IaaS service from “Provider A” and a PaaS service from “Provider B”. The PaaS service may inherit broad network access from “Provider A” but must identify and support the inherited service as an acceptable IaaS provider.

Assessing Broad Network Access

Typically, broad network access for public deployment models implies high bandwidth access from the public internet for authorized users. In a private cloud deployment internet access might be considered broad access, as might be access through a dedicated shared high bandwidth network connection from the Ordering Activity, in accord with the private nature of the deployment model.

Resource Pooling and Private Cloud

All cloud resource pools are finite, and only give the appearance of infinite resources when sufficiently large, as is sometimes the case with a public cloud. The resource pool supporting a private cloud is typically smaller with more visible limits. A finite pool of resources purchased as a private cloud service qualifies as resource pooling so long as the resources within the pool can be dynamically allocated to the ultimate users of the resource, even though the pool itself appears finite to the Ordering Activity that procures access to the pool as a source of dynamic service allocation.

b. NIST Service Model

The Contractor may optionally document the service model of cloud computing (e.g. IaaS, PaaS, SaaS, or a combination thereof, that most closely describes their offering, using the definitions in The NIST Definition of Cloud Computing SP 800-145. The following guidance is offered for the
proper selection of service models. The Contractor may optionally document the service model of cloud computing (e.g. IaaS, PaaS, SaaS, or a combination thereof, that most closely describes their offering, using the definitions in The NIST Definition of Cloud Computing SP 800-145. The following guidance is offered for the proper selection of service models.

NIST’s service models provide this SIN with a set of consistent sub-categories to assist ordering activities in locating and comparing services of interest. Service model is primarily concerned with the nature of the service offered and the staff and activities most likely to interact with the service. Contractors should select a single service model most closely corresponding to their proposed service based on the guidance below. It is understood that cloud services can technically incorporate multiple service models and the intent is to provide the single best categorization of the service.

Contractors should take care to select the NIST service model most closely corresponding to each service offered. Contractors should not invent, proliferate or select multiple cloud service model sub-categories to distinguish their offerings, because ad-hoc categorization prevents consumers from comparing similar offerings. Instead vendors should make full use of the existing NIST categories to the fullest extent possible.

For example, in this SIN an offering commercially marketed by a Contractor as “Storage as a Service” would be properly characterized as Infrastructure as a Service (IaaS), storage being a subset of infrastructure. Services commercially marketed as “LAMP as a Service” or “Database as a Service” would be properly characterized under this SIN as Platform as a Service (PaaS), as they deliver two kinds of platform services. Services commercially marketed as “Travel Facilitation as a Service” or “Email as a Service” would be properly characterized as species of Software as a Service (SaaS) for this SIN. However, Contractors can and should include appropriate descriptions (include commercial marketing terms) of the service in the full descriptions of the service’s capabilities.

When choosing between equally plausible service model sub-categories, Contractors should consider several factors:

1) **Visibility Visibility to the Ordering Activity.** Service model sub-categories in this SIN exist to help Ordering Activities match their requirements with service characteristics. Contractors should select the most intuitive and appropriate service model from the point of view of an Ordering Activity.

2) **Primary Focus of the Service.** Services may offer a mix of capabilities that span service models in the strict technical sense. For example, a service may offer both IaaS capabilities for processing and storage, along with some PaaS capabilities for application deployment, or SaaS capabilities for specific applications. In a service mix situation, the Contractor should select the service model that is their primary focus. Alternatively, contractors may choose to submit multiple service offerings for the SIN, each optionally and separately
3) **Ordering Activity Role.** Contractors should consider the operational role of the Ordering Activity’s primary actual consumer or operator of the service. For example, services most often consumed by system managers are likely to fit best as IaaS; services most often consumed by application deployers or developers as PaaS, and services most often consumed by business users as SaaS.

4) **Lowest Level of Configurability.** Contractors can consider IaaS, PaaS and SaaS as an ascending hierarchy of complexity, and select the model with the lowest level of available Ordering Activity interaction. As an example, virtual machines are an IaaS service often bundled with a range of operating systems, which are PaaS services. The Ordering Activity usually has access to configure the lower level IaaS service, and the overall service should be considered IaaS. In cases where the Ordering Activity cannot configure the speed, memory, network configuration, or any other aspect of the IaaS component, consider categorizing as a PaaS service.

Cloud management and cloud broker services should be categorized based on their own characteristics and not those of the other cloud services that are their targets. Management and broker services typically fit the SaaS service model, regardless of whether the services they manage are SaaS, PaaS or IaaS. Use Table 3 to determine which service model is appropriate for the cloud management or cloud broker services, or, alternately choose not to select a service model for the service.

The guidance in Table 4 offers examples of how services might be properly mapped to NIST service models and how a Contractor should interpret the service model sub-categories.

### Table 4: Guidance on Mapping to NIST Service Models

<table>
<thead>
<tr>
<th>Service Model</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Infrastructure as a Service (IaaS)</strong></td>
<td>Select an IaaS model for service based equivalents of hardware appliances such as virtual machines, storage devices, routers and other physical devices.</td>
</tr>
<tr>
<td></td>
<td>• IaaS services are typically consumed by system or device managers who would configure physical hardware in non-cloud setting</td>
</tr>
<tr>
<td></td>
<td>• The principal customer interaction with an IaaS service is provisioning then configuration, equivalent to procuring and then configuring a physical device.</td>
</tr>
</tbody>
</table>
Examples of IaaS services include virtual machines, object storage, disk block storage, network routers and firewalls, software defined networks.

Gray areas include services that emulate or act as dedicated appliances and are directly used by applications, such as search appliances, security appliances, etc. To the extent that these services or their emulated devices provide direct capability to an application they might be better classified as Platform services (PaaS). To the extent that they resemble raw hardware and are consumed by other platform services they are better classified as IaaS.

<table>
<thead>
<tr>
<th>Platform as a Service (PaaS)</th>
<th>Select a PaaS model for service based equivalents of complete or partial software platforms. For the purposes of this classification, consider a platform as a set of software services capable of deploying all or part of an application.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A complete platform can deploy an entire application. Complete platforms can be proprietary or open source</td>
</tr>
<tr>
<td></td>
<td>Partial platforms can deploy a component of an application which combined with other components make up the entire deployment</td>
</tr>
<tr>
<td></td>
<td>PaaS services are typically consumed by application deployment staff whose responsibility is to take a completed agency application and cause it to run on the designated complete or partial platform service</td>
</tr>
<tr>
<td></td>
<td>The principal customer interaction with a PaaS service is deployment, equivalent to deploying an application or portion of an application on a software platform service</td>
</tr>
<tr>
<td></td>
<td>A limited range of configuration options for the platform service may be available</td>
</tr>
</tbody>
</table>

Examples of complete PaaS services include:
- A Linux/Apache/MySQL/PHP (LAMP) platform ready to deploy a customer PHP application
- A Windows .NET platform ready to deploy a .NET application
- A custom complete platform ready to develop and deploy a customer application in proprietary language
A multiple capability platform ready to deploy an arbitrary customer application on a range of underlying software services

The essential characteristic of a complete PaaS is defined by the customer’s ability to deploy a complete custom application directly on the platform.

PaaS includes partial services as well as complete platform services. Illustrative examples of individual platform enables or components include:

- A database service ready to deploy a customer’s tables, views and procedures
- A queuing service ready to deploy a customer’s message definitions
- A security service ready to deploy a customer’s constraints and target applications for continuous monitoring

The essential characteristic of an individual PaaS component is the customer’s ability to deploy their unique structures and/or data onto the component for a partial platform function.

Note that both the partial and complete PaaS examples all have two things in common:

- They are both software services, which offer significant core functionality out of the box
- They must be configured with customer data and structures to deliver results

As noted in IaaS, operating systems present a grey area in that OS is definitely a platform service, but is typically bundled with IaaS infrastructure. If your service provides an OS but allows for interaction with infrastructure, please sub-categorize it as IaaS. If your service “hides” underlying infrastructure, consider it as PaaS.

| Software as a Service (SaaS) | Select a SaaS model for service based equivalents of software applications. |
• SaaS services are typically consumed by business or subject-matter staff who would interact directly with the application in a non-cloud setting
• The principal customer interaction with a SaaS service is actual operation and consumption of the application services the SaaS service provides

Some minor configuration may be available, but the scope of the configuration is limited to the scope and then permissions of the configuring user. For example, an agency manager might be able to configure some aspects of the application for their agency but not for all agencies. An agency user might be able to configure some aspects for themselves but not everyone in their agency. Typically, only the Contractor would be permitted to configure aspects of the software for all users.

Examples of SaaS services include email systems, business systems of all sorts such as travel systems, inventory systems, etc., wiki’s, websites or content management systems, management applications that allow a customer to manage other cloud or non-cloud services, and in general any system where customers interact directly for a business purpose.

Grey areas include services that customers use to configure other cloud services, such as cloud management software, cloud brokers, etc. In general, these sorts of systems should be considered SaaS, per guidance in this document.

c. Deployment Model
Deployment models (e.g. private, public, community, or hybrid) are not restricted at the SIN level and any specifications for a deployment model are the responsibility of the Ordering Activity.

Multiple deployment model selection is permitted, but at least one model must be selected. The guidance in Table 5 offers examples of how services might be properly mapped to NIST deployment models and how the Contractor should interpret the deployment model characteristics. Contractors should take care to select the range of NIST deployment models most closely corresponding to each service offered.
Note that the scope of this SIN does not include hardware or software components used to construct a cloud, only cloud capabilities delivered as a service, as noted in the Scope section.

Table 5: Guidance for Selecting a Deployment Model

<table>
<thead>
<tr>
<th>Service Model</th>
<th>Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Private Cloud</td>
<td>This service is provided exclusively for the benefit of a definable organization and its components; access from outside the organization is prohibited. The actual services may be provided by third parties, and may be physically located as required, but access is strictly defined by membership in the owning organization.</td>
</tr>
<tr>
<td>Public Cloud</td>
<td>The service is provided for general public use and can be accessed by any entity or organization willing to contract for it.</td>
</tr>
<tr>
<td>Community Cloud</td>
<td>The service is provided for the exclusive use of a community with a definable shared boundary such as a mission or interest. As with private cloud, the service may be in any suitable location and administered by a community member or a third party.</td>
</tr>
<tr>
<td>Hybrid Cloud</td>
<td>The service is composed of one or more of the other models. Typically hybrid models include some aspect of transition between the models that make them up, for example a private and public cloud might be designed as a hybrid cloud where events like increased load permit certain specified services in the private cloud to run in a public cloud for extra capacity, e.g. bursting.</td>
</tr>
</tbody>
</table>
FACTORS FOR EVALUATION
FOR IT SCHEDULE 70 CLOUD COMPUTING SERVICES SIN

The following technical evaluation factor applies in addition to the standard Schedule 70 evaluation factors outlined in CI-FSS-152 ADDITIONAL EVALUATION FACTORS and related documents and applies solely to the Cloud Computing Services SIN. A template will be provided at the time of solicitation refresh to complete the requested documentation.

Cloud Computing Services Adherence to Essential Cloud Characteristics

Within a two-page limitation for each cloud service submitted, provide a description of how the cloud computing service meets each of the five essential cloud computing characteristics as defined in described in National Institute of Standards and Technology (NIST) Special Publication 800-145 and subsequent versions of this publication. This standard specifies the definition of cloud computing for the use by Federal agencies. The cloud service must be capable of satisfying each of the five NIST essential Characteristics as follows:

On-demand self-service
Collector Systems has the ability to provision servers, storage, database, load balancer and other services through the use of Rackspace data centers using the Rackspace MyCloud management console. Collector Systems can configure the automatic provisioning and de-provisioning during their automated patch routines. The process is automatic and results in the immediate availability and use of said service. There is no human involvement with Collector Systems’ engineers and Collector Systems does not need to install any software, O/S or handle any physical infrastructure - everything is virtualized and available on demand.

Broad Network Access
The entire Rackspace data center cloud service that Collector Systems utilizes as their service provider accesses and provisions services as needed. The requested services are managed and decommissioned by using a secure web browser session. This allows Collector Systems to provision and manage services and capacity via mobile, tablet and desktop devices.

Resource Pooling
The cloud services Collector Systems utilize through Rackspace are extensive. Rackspace serves over 300,000 active customers in more than 120 countries. This large infrastructure provides a variety of virtual services and service capacities, including over 30 virtual server types of mixed CPU, memory, storage and i/o as well as various virtual storage options for real time, back up and archiving needs (Cloud Backup, Cloud Block Storage). Rackspace dynamically allocates bandwidth and has diversity through multiple carriers in each data center. Collector Systems utilizes dedicated Microsoft SQL servers. Collector Systems utilizes Rackspace’s multiple data centers for redundancy. Collector Systems maintains data currently only in the United States.
Rapid Elasticity
Collector Systems uses Rackspace’s elasticity for services such as load balancers to automatically scale up and down as needed to meet customer demand. Collector Systems utilizes the auto scaling inherent in Rackspace computer resources to increase the number and size of instances, and the scalability and provisioning of dedicated SQL servers to meet demand. Collector Systems utilizes metrics provided by Rackspace to review and analyze load and performance to automatically make available additional resources based on utilization rules. Massive auto scaling capacity is available as demand increases.

Measured Service
Collector Systems subscribes to Rackspace’s managed services as well as other outside services to monitor and report on the utilization of the various resources Collector Systems consumes and security services that Collector Systems subscribes to through Rackspace’s infrastructure. This combination of managed services allows for rapid deployment and mitigation based on security and optimization needs.

Cloud Computing Services Deployment Model

For each cloud service submitted, provide a written description of how the proposed service meets the NIST definition of a particular deployment model (Public, Private, Community, or Hybrid), within a one half (1/2) page limitation for each designated deployment model of each cloud service submitted. Multiple deployment model selection is permitted, but at least one model must be indicated.

Refer to the ‘Guidance for Contractors’ section of the Terms & Conditions for the Cloud Computing Services SIN for guidance on identifying the appropriate deployment model according to the NIST service model definitions.

Under the NIST service model Collector Systems, LLC should be sub classified as Software as a Service with private cloud deployment.

Private Cloud
Collector Systems’ servers are provided as private cloud instances for security and have their own dedicated database. Cloud infrastructure is provisioned for exclusive use by a single organization composing multiple consumers (e.g. business units).
Cloud Computing Services Service Model

For each cloud computing service proposed to be categorized under a specific sub-category (IaaS, PaaS or SaaS), provide a written description of how the proposed service meets the NIST definition of that service model, within a half (1/2) page limitation for each cloud service submitted.

Refer to the ‘Guidance for Contractors’ section of the Terms & Conditions for the Cloud Computing Services SIN for guidance on categorizing the service into a sub-category according to the NIST service model definitions.

Note that it is not mandatory to select a sub-category, and therefore this factor for evaluation applies ONLY to cloud services proposed to fall under a specific sub-category. If no sub-category is selected, this factor does not need to be addressed. The two other factors (‘Adherence to Essential Cloud Characteristics’ and ‘Cloud Computing Services Deployment Model’) apply to all cloud services.

Software as a Service (SaaS)
Collector Systems is provided to consumers as an application running on a cloud infrastructure. The application is accessible from any supported web browser as well as through native mobile applications running on iOS operating system. The consumer does not manage or control the underlying infrastructure network, servers, operating systems, storage, or even individual application capabilities, with the possible exception of limited user specific application configuration settings.
TERMS AND CONDITIONS FOR MAINTENANCE AS A SERVICE (132-34)

Terms and Conditions Applicable to Maintenance as a Service (Special Item Number 132-34) of General Purpose Commercial Information Technology Software

1. 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 software that has been tendered for acceptance. 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 software, unless the change is due to the defect in the software.

2. Enterprise User License Agreements Requirements (EULA)

The contractor shall provide all Enterprise User License Agreements in an editable Microsoft Office (Word) Format.

3. Guarantee/Warranty

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

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 terms.

4. Technical Services
The Contractor, without additional charge to the ordering activity, shall provide a hotline technical support number (212) 431-0897 x115 for the purpose of providing user assistance and guidance in the implementation of the software. The technical support number is available from **9am to 6pm EST**.

Collector Systems provides a dedicated account contact for each contract. In addition to telephone support, assistance is available through email and/or online web meetings.

5. **Software Maintenance**
   
a. Software maintenance as it is defined:

   __X__ 1. Software Maintenance as a Service (SIN 132-34)

   Software maintenance as a service creates, designs, implements, and/or integrates customized changes to software that solve one or more problems and is not included with the price of the software. Software maintenance as a service includes person-to-person communications regardless of the medium used to communicate: telephone support, on-line technical support, customized support, and/or technical expertise which are charged commercially. Software maintenance as a service is billed arrears in accordance with 31 U.S.C. 3324.

   Software maintenance as a service is billed in arrears in accordance with 31 U.S.C. 3324.

   b. Invoices for maintenance service shall be submitted by the Contractor on a quarterly or monthly basis, after the completion of such a period. Maintenance charges must be paid in arrears (31 U.S.C. 3324). **PROMPT PAYMENT DISCOUNT, IF APPLICABLE, SHALL BE SHOWN ON THE INVOICE.**

6. **Periods of Maintenance (SIN 132-34)**
   
a. The Contractor shall honor orders for periods for the duration of the contract period or a lesser period of time.

   b. Term licenses and/or maintenance may be discontinued by the ordering activity on thirty (30) calendar days written notice to the Contractor.

   c. Annual Funding. When annually appropriated funds are cited on an order for term licenses and/or maintenance, the period of the term licenses and/or maintenance shall automatically expire on September 30 of the contract period, or at the end of the contract period,
whichever occurs first. Renewal of the term licenses and/or maintenance orders citing the new appropriation shall be required, if the term licenses and/or maintenance is to be continued during any remainder of the contract period.

d. Cross-Year Funding Within Contract Period. Where an ordering activity’s specific appropriation authority provides for funds in excess of a 12 month (fiscal year) period, the ordering activity may place an order under this schedule contract for a period up to the expiration of the contract period notwithstanding the intervening fiscal years.

e. Ordering activities should notify the Contractor in writing 30 calendar days prior to the expiration of an order if the term licenses and/or maintenance is to be terminated at that time. Orders for the continuation of term licenses will be required if the term licenses and/or maintenance is to be continued during the subsequent period.

7. Conversion from Term License to Perpetual License – NOT APPLICABLE

a. The ordering activity may convert term licenses to perpetual licenses for any or all software at any time following acceptance of software. At the request of the ordering activity the Contractor shall furnish, within ten (10) calendar days, for each software product that is contemplated for conversion, the total amount of conversion credits which have accrued while the software was on a term license and the date of the last update or enhancement.

b. Conversion credits which are provided shall, within the limits specified, continue to accrue from one contract period to the next, provided the software remains on a term license within the ordering activity.

c. The term license for each software product shall be discontinued on the day immediately preceding the effective date of conversion from a term license to a perpetual license.

d. The price the ordering activity shall pay will be the perpetual license price that prevailed at the time such software was initially ordered under a term license, or the perpetual license price prevailing at the time of conversion from a term license to a perpetual license, whichever is the less, minus an amount equal to ___% of all term license payments during the period that the software was under a term license within the ordering activity.

8. Term License Cessation – NOT APPLICABLE

a. After a software product has been on a continuous term license for a period of N/A months, a fully paid-up, non-exclusive, perpetual license for the software product shall automatically accrue to the ordering activity. The period of continuous term license for
automatic accrual of a fully paid-up perpetual license does not have to be achieved during a particular fiscal year; it is a written Contractor commitment which continues to be available for software that is initially ordered under this contract, until a fully paid-up perpetual license accrues to the ordering activity. However, should the term license of the software be discontinued before the specified period of the continuous term license has been satisfied, the perpetual license accrual shall be forfeited.

b. The Contractor agrees to provide updates and maintenance service for the software after a perpetual license has accrued, at the prices and terms of Special Item Number 132-34, if the licensee elects to order such services. Title to the software shall remain with the Contractor.

9. **Utilization Limitations – (SIN 132-34)**

a. Software acquisition is limited to commercial computer software defined in FAR Part 2.101.

b. When acquired by the ordering activity, commercial computer software and related documentation so legend shall be subject to the following:

(1) Title and ownership of the software and documentation shall remain with the Contractor, unless otherwise specified.

(2) Software licenses are by site and ordering activity. An ordering activity is defined as a cabinet level or independent ordering activity. The software may be used by a subdivision of the ordering activity (service, bureau, division, command etc.) that has access to the site the software is placed at, even if the subdivision did not participate in the acquisition of the software. Further, the software may be used on a sharing basis where multiple agencies have joint projects that can be satisfied by the use of the software placed at one ordering activity’s site. This would allow other agencies access to one ordering activity’s database. For ordering activity public domain databases, user agencies and third parties may use the computer program to enter, retrieve, analyze and present data. The user ordering activity will take appropriate action by instruction, agreement, or otherwise, to protect the Contractor’s proprietary property with any third parties that are permitted access to the computer programs and documentation in connection with the user ordering activity’s permitted use of the computer programs and documentation. For purposes of this section, all such permitted third parties shall be deemed agents of the user ordering activity.

(3) Except as is provided in paragraph 8.b(2) above, the ordering activity shall not provide or otherwise make available the software or documentation, or any portion thereof, in any form, to any third party without the prior written approval of the Contractor. Third parties do not include prime Contractors, subcontractors and agents of the ordering activity who
have the ordering activity’s permission to use the licensed software and documentation at the facility, and who have agreed to use the licensed software and documentation only in accordance with these restrictions. This provision does not limit the right of the ordering activity to use software, documentation, or information therein, which the ordering activity may already have or obtains without restriction.

(4) The ordering activity shall have the right to use the computer software and documentation with the computer for which it is acquired at any other facility to which that computer may be transferred, or in cases of Disaster Recover, the ordering activity has the right to transfer the software to another site if the ordering activity site for which it is acquired is deemed to be unsafe for ordering activity personnel; to use the computer software and documentation with a backup computer when the primary computer is inoperative; to copy computer programs for safekeeping (archives) or backup purposes; to transfer a copy of the software to another site for purposes of benchmarking new hardware and/or software; and to modify the software and documentation or combine it with other software, provided that the unmodified portions shall remain subject to these restrictions.

(5) “Commercial Computer Software” may be marked with the Contractor’s standard commercial restricted rights legend, but the schedule contract and schedule pricelist, including this clause, “Utilization Limitations” are the only governing terms and conditions, and shall take prudence and supersede any different or additional terms and conditions included in the standard commercial legend.

10. Software Conversions – (SIN 132-32) – Not offered

Full monetary credit will be allowed to the ordering activity when conversion from one version of the software to another is made as a result of a change in operating system, or from one computer system to another. Under a perpetual license (132-33), the purchase price of the new software shall be reduced by the amount that was paid to purchase the earlier version. Under a term license (132-32), conversion credits which accrued while the earlier version was under a term license shall carry forward and remain available as conversion credits which may be applied towards the perpetual license price of the new version.

11. Descriptions and Equipment Compatibility

ABOUT COLLECTOR SYSTEMS

Collector Systems is a versatile cloud-based collections management solution that allows users to thoroughly document, catalogue, and store images of a collection via computer, smartphone, and
tablet. The world’s most prestigious dealers, collectors, museums, and institutions use CS to host more than 400,000 art and collectible items with a combined value exceeding $14 billion.

Collector Systems software is available to subscribers through a Software as a Service (SaaS) platform that is accessible from any computer, tablet, or smartphone with guaranteed bank-level privacy and security. The software is available in eleven (11) major languages and allows users the ability to document extensive characteristics of their collections.

Collector Systems was designed to be the most user-friendly and easy-to-navigate collection management system on the market. Our philosophy is that users should be able to find anything they need within three clicks of a mouse. Quickly scan through artists, collections, and locations using the Browse menu, or use the main menu bar at the top of the page to access exhibitions, loans, insurance, and more. When viewing an object, you do not have to navigate away from the page to view further details; our innovative tabs allow users to display conservation, publications,
valuations, and more on the same page with the main object information and image. No navigating back and forth - just the data you need, all in one place.

Collector Systems provides the tools to document all aspects of any type of collection. Beyond recording basic object information, the user can document the condition, conservation, provenance, exhibitions, and publications related to any piece. Track the current and the past location for any item. Store an unlimited number of related images and documents, and record all past and current information on shipments, loans, consignments, insurance, and valuations.

The powerful Calendar feature provides the user with an area to track exhibitions, loans, shipments, and other important events. Add a time and description, invite guests, or make the event recurring. Assign events to color-coded groupings so you can see each type at a glance. In addition, the Calendar makes it simple to maintain a historical record. Going back years or even decades in time is quick and easy with our navigation tools.

Browsing the collection on the main Object page
Viewing the Object Detail page
Using the Calendar to track and view events

Day-to-day management of a collection is easy with Collector Systems. Editing object details is as simple as clicking Edit. Any unused data fields will not display on the object page, keeping the screen clean and uncluttered. The search function adapts to the query as it is entered, so the user only has to know a piece of a word or phrase to retrieve matching results. Search by inventory number, artist, medium, and a number of other fields, including user-defined fields. If a more extensive search is required, the Advanced Search option allows users to query many additional data fields to find exactly what they need.

Every Collector Systems subscription includes a variety of pre-formatted report templates that can be downloaded to PDF or Word. In addition, users can create their own customized report layouts using our built-in editing tools. Download and print inventory reports, catalogue sheets with large images, loan agreements with cover sheets and addendums, exhibition plans, condition and conservation reports with multiple images, full financial statements with totals, and more. The possibilities are endless. The Label writer provides even more power with the ability to quickly download and print barcodes associated with the object inventory number. Users can either select
from one of our predefined templates, or create a custom label of their own. Keeping track of a large collection has never been this simple.

The Collector Systems import feature makes it easy to import hundreds of objects simultaneously. We provide an easy-to-use Excel template, which, when uploaded, automatically maps the data into the appropriate field. In addition, you can batch upload images, documents, acquisition information, and more. Using the Export feature, object information can be downloaded to the user’s local computer in Excel format. Select the items to export, or download a record of the entire collection with all data points. We make it easy to store a local backup of data or download a copy of your information for use in other applications.

Collector Systems utilizes some of the most advanced technologies for Internet security available today. When the client accesses the site using industry standard Secure Socket Layout (SSL) technology, the information is protected using both server authentication and data encryption ensuring that the client’s data is safe, secure, and available only to registered and approved users.

**Collector Systems Gallery**
The Gallery allows the museum or institution to share a view-only snapshot of their collection with the public. Create multiple, custom groupings of objects - called galleries - and let Collector Systems do the rest. We automatically create a clean, professional website interface accessible from any Internet-enabled computer or device.

The museum or institution can share galleries publicly via their own customizable url, or invite select colleagues, students and advisors to view private, password-protected galleries. Users control which fields visitors are able to see, allowing others to enjoy the collection while still maintaining the privacy of their information. Visitors can sort objects, search the collection, zoom in on multiple images, and generate a beautiful slideshow with a single click.
Collector Systems API RESTful (JSON) is ideal for fully utilizing the museum’s Collector Systems data on public website and social media. The API includes ways for the developer to implement custom design, display, and functionality in order to address the specific needs of your organization.

**Services Offered**
Collector Systems, LLC offers the following services:

- **Database conversion and migration.** Collector Systems provides data conversion and migration services to convert data from a wide range of platforms. Our staff of trained Registrars will not simply perform a data dump from one system to another but will parse and accurately map the contents of every field from the existing database. Full image and document upload is included with this service. A sample of the existing data is required in order to provide a full quote for data conversion and migration services.
System Requirements
Collector Systems is a cloud-based system and therefore can be accessed from any computer with an Internet connection and current browser. No additional plug-in, add-in, or components are required. Collector Systems supports both the current version and previous two (2) full versions of all browsers (Internet Explorer, Safari, Firefox and Chrome). The system can also be accessed on any tablet device or smartphone, such as the iPhone or iPad, utilizing the built-in browser or dedicated iPhone/iPad apps.

12. Right-to-Copy Pricing

Not Applicable
## PRICE LIST FOR SIN 132-70 AND 132-34

### SIN 132-40 CLOUD COMPUTING SERVICES

<table>
<thead>
<tr>
<th>SIN</th>
<th>Item</th>
<th>Description</th>
<th>GSA Price per User per Month (with IFF)</th>
</tr>
</thead>
<tbody>
<tr>
<td>132-40</td>
<td>CSCOL</td>
<td>CS Collector</td>
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<td>132-40</td>
<td>CSCOL+</td>
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<td>132-40</td>
<td>CSCOR</td>
<td>CS Corporate</td>
<td>$143.57</td>
</tr>
</tbody>
</table>

### SIN 132-34 MAINTENANCE OF SOFTWARE

<table>
<thead>
<tr>
<th>SIN</th>
<th>Item</th>
<th>Description</th>
<th>GSA Price per Hour (with IFF)</th>
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<tbody>
<tr>
<td>132-34</td>
<td>CSSUPPORT</td>
<td>Software Support/Maintenance</td>
<td>$157.93</td>
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