

**EXECUTIVE DOCUMENT SUMMARY**

Instructions for completing the EDS and the Contract process.

1. Please read the guidelines on the back of this form.
2. Please type all information.
3. Check all boxes that apply.
4. For amendments / renewals, attach original contract.
5. Attach additional pages if necessary.

1. EDS Number: <b>A281-3-PSA-IODD-1009</b>	2. Date prepared: <b>5/4/2023</b>
<b>3. CONTRACTS &amp; LEASES</b>	

AGENCY INFORMATION	
14. Name of agency: <b>Economic Development Corp</b>	15. Requisition Number: <b>00000010036</b>
16. Address: <small>IN Economic Development Corp Central Office 1 N CAPITOL AVE STE 700 INDIANAPOLIS, IN 46204</small>	

AGENCY CONTACT INFORMATION	
17. Name: <b>Glenda Reitz-May</b>	18. Telephone #: <b>317.447.2617</b>
19. E-mail address <b>greitz@iedc.in.gov</b>	

COURIER INFORMATION	
20. Name: <b>Glenda Reitz-May</b>	21. Telephone #: <b>317.447.2617</b>
22. E-mail address: <b>greitz@iedc.in.gov</b>	

VENDOR INFORMATION	
23. Vendor ID Number: <b>0000054131</b>	
24. Name: <b>Guidesoft Inc</b>	25. Telephone #:

26. Address: <b>dba Knowledge Services 9800 Crosspoint Blvd Indianapolis, IN 46256</b>	
27. E-mail address:	
28. Is the vendor registered with the Secretary of State? ( <i>Out of State Corporations, must be registered</i> ) <input type="checkbox"/> Yes <input type="checkbox"/> No	

29. Primary Vendor: M/WBE/IN-Veteran Minority: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Women: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No IN-Veteran: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	30. Primary Vendor Percentages: <b>100</b> %
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31. Sub Vendor: M/WBE/IN-Veteran Minority: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Women: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No IN-Veteran: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	32. If yes, list the %: Minority: _____ % Women: _____ % IN-Veteran: _____ %
33. Is there Renewal Language in the document? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	34. Is there a "Termination for Convenience" clause in the document? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

<input type="checkbox"/> Professional/Personal Services	<input type="checkbox"/> Contract for procured Services
<input checked="" type="checkbox"/> Grant	<input type="checkbox"/> Maintenance
<input type="checkbox"/> Lease	<input type="checkbox"/> License Agreement
<input type="checkbox"/> Attorney	<input type="checkbox"/> Amendment # _____
<input type="checkbox"/> MOU	<input type="checkbox"/> Renewal # _____
<input type="checkbox"/> QPA	<input type="checkbox"/> Other _____

FISCAL INFORMATION	
4. Account Number: <b>12120-10400.539034</b>	5. Account Name: <b>IODD</b>
6. Total amount this action: <b>\$150,000.00</b>	7. New contract total: <b>\$150,000.00</b>
8. Revenue generated this action: <b>\$0.00</b>	9. Revenue generated total contract: <b>\$0.00</b>
10. New total amount for each fiscal year: Year 2023 <b>\$150,000.00</b>	
Year _____ \$ _____	Year _____ \$ _____
Year _____ \$ _____	Year _____ \$ _____
Year _____ \$ _____	Year _____ \$ _____
Year _____ \$ _____	Year _____ \$ _____

TIME PERIOD COVERED IN THIS EDS	
11. From (month, day, year): <b>5/1/2023</b>	12. To (month, day, year): <b>9/30/2023</b>
13. Method of source selection: <input type="checkbox"/> Bid/Quotation <input type="checkbox"/> Emergency <input checked="" type="checkbox"/> Negotiated <input type="checkbox"/> RFP # _____ <input type="checkbox"/> Other ( <i>specify</i> ) _____ <input type="checkbox"/> Special Procurement	

35. Will the attached document involve data processing or telecommunications systems(s)? <input type="checkbox"/> Yes: IOT or Delegate has signed off on contract
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36. Statutory Authority ( <i>Cite applicable Indiana or Federal Codes</i> ): <b>IC 5-28-8</b>
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37. Description of work and justification for spending money. *Please give a brief description of the scope of work included in this agreement .)* The Indiana Economic Development Corporation's (IEDC) Defense Procurement Accelerator (DPA) is designed to support Indiana businesses so that they can grow their market share within the Defense market. To support the DPA's overall goals of expanding Indiana companies' market share, the IEDC is seeking services and technology that can accelerate Indiana's share of the defense market. The following are the three main components expected in the first phase of the DPA: Create a DPA landing page to serve as (1) an overview of the DPA and its purpose, and (2) provide a queries form for Indiana companies, leveraging the GovShop Dataset; Enable Indiana companies to submit queries for teaming partners (primes, non-trationals, academics, new entrants); and, Plan for next phases of the DPA in order to capture larger share of defense market

Project ID: <b>424524</b>
39. Justification of vendor selection and determination of price reasonableness:

39. If this contract is submitted late, please explain why: ( <i>Required if more than 30 days late.</i> )
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40. Agency fiscal officer or representative approval <i>Robert J. Paglia</i>	41. Date Approved <b>May 5, 2023</b>	42. Budget agency approval <i>Jack Henderson</i> <small>Jack Henderson (May 17, 2023 13:41 EDT)</small>	43. Date Approved <b>May 17, 2023</b>
44. Attorney General's Office approval	45. Date Approved	46. Agency representative receiving from AG	47. Date Approved

## PROFESSIONAL SERVICES AGREEMENT

This **PROFESSIONAL SERVICES AGREEMENT** (this “**Agreement**”) is made and entered into, by and between the **INDIANA ECONOMIC DEVELOPMENT CORPORATION** (the “**IEDC**”) and **GUIDESOFT, INC. D.B.A. KNOWLEDGE SERVICES** (the “**Contractor**”).

In consideration of the mutual undertakings and covenants set forth herein, the parties hereby agree as follows:

### 1. PURPOSE OF AGREEMENT.

The purpose of this Agreement is for the Contractor to develop a Defense Procurement Accelerator, as set forth in **Exhibit A** (the “**Project Description**”) attached hereto and made a part hereof.

### 2. TERM.

- (A) This Agreement shall commence on May 1, 2023 and shall remain in effect through September 30, 2023 unless earlier terminated in accordance with the provisions of this Agreement (the “**Expiration Date**”). All work and/or services under this Agreement must be completed by the Expiration Date. In no event shall payments be made for work done or services performed after the Expiration Date.
- (B) This Agreement may be renewed under the same terms and conditions, subject to the approval of the parties and the State Budget Director. The term of the renewed Agreement may not be longer than the term of the original Agreement. All renewals and extensions must be in writing and signed by all parties.
- (C) Any provisions which, by their nature, are intended to apply after termination of this Agreement shall survive termination of this Agreement, including provisions for payment of amounts owed for work performed under this Agreement, disclaimer of warranty, limitation of liability, and intellectual property clauses.

### 3. CONSIDERATION.

- (A) All services performed by the Contractor under this Agreement must be authorized by the IEDC and consistent with the description set forth in **Exhibit A**. For the services provided hereunder, the Contractor shall be compensated in accordance with the budget, as more particularly described at **Exhibit A**. Total remuneration under this Agreement shall not exceed **\$150,000** (the “**Agreement Amount**”).
- (B) All work and/or services provided by the Contractor under this Agreement must be performed to the IEDC’s reasonable satisfaction, which satisfaction shall be determined at the discretion of the IEDC, and in accordance with all applicable federal, state, local laws, ordinances, rules, and regulations. The IEDC shall not be required to pay for work found to be unsatisfactory, inconsistent with this Agreement, or performed in violation of federal, state, or local laws.

### 4. PAYMENTS.

- (A) The Contractor shall submit invoices for payment in connection with its services provided hereunder. The Contractor shall submit with the invoice, its monthly progress report summarizing the Contractor's work under this Agreement to date, the requirements of which are further described at **Exhibit A**. The Contractor shall submit invoices to the IEDC at payable@iedc.in.gov.
- (B) All payment obligations shall be made in arrears in accordance with Indiana law and state fiscal policies and procedures, and as required by Indiana Code § 4-13-2-14.8. Notwithstanding any other law, rule, or custom, a person or company whom has a contract with the State of Indiana or submits invoices to the state for payment shall authorize, in writing, the direct deposit by electronic funds transfer of all payments by the state to the person or company. The written authorization must designate a financial institution and an account number to which all payments are to be credited. Any exception to this requirement must be approved by the IEDC and the State of Indiana. For forms and additional information, see the Auditor of State's website at [www.in.gov/auditor/forms](http://www.in.gov/auditor/forms).
- (C) No travel and other expenditures made by the Contractor will be reimbursed by the IEDC unless provided for in **Exhibit A**. Allowable expenditures made by the Contractor for travel will be reimbursed at the current rate paid by the IEDC and in accordance with the State Travel Policies and Guidelines as specified in the current Financial Management Circular, available at <http://www.in.gov/idoa/2459.htm>. All expenses must be approved by the IEDC in writing in advance. Out-of-state travel requests must be reviewed by the IEDC for availability of funds and for appropriateness per Financial Management Circular guidelines.

## **5. CONFIDENTIALITY OF INFORMATION.**

- (A) The Contractor understands and agrees that data, materials, and information disclosed to the Contractor may contain confidential and protected data. Therefore, the Contractor promises and assures that data, material, and information disclosed to the Contractor by the IEDC for the purpose of this Agreement, and specifically identified as confidential information will not be disclosed to others or discussed with other parties without the prior written consent of the IEDC.
- (B) The parties acknowledge that the services to be performed by the Contractor for the IEDC under this Agreement may require or allow access to data, materials, and information containing Social Security numbers or other personal information maintained by the IEDC in its computer system or other record. In addition to the covenant made above in this Paragraph 5, and pursuant to 10 IAC 5-3-1(4), the Contractor and the IEDC agree to comply with the provisions of Indiana Code § 4-1-10 and Indiana Code § 4-1-11. If any Social Security number(s) or personal information (as defined in Indiana Code § 4-1-11-3) is/are disclosed by the Contractor, the Contractor agrees to pay the cost of the notice of disclosure of a breach of the security of the system, in addition to any other claims and expenses for which it is liable under the terms of this Agreement.

## **6. USE OF THE IEDC NAME; PUBLIC RELATIONS & MARKETING.**

The IEDC has not granted any rights to use its name, trademark, intellectual property, or logos. The Contractor agrees that it will not use the name or intellectual property, including, but not limited to, IEDC trademarks or logos, in any manner, including commercial advertising or as a business reference without the prior written consent of the IEDC. In all cases in which the IEDC's participation will be referenced, the IEDC shall have the right of review and approval of the use, disclosure, and the finished product prior to its publication. All such requests shall be made in writing and delivered to the IEDC for approval at its sole discretion.

All external facing communications related to this Agreement, including but not limited to marketing, public relations and social media materials and content, shall be developed in consultation with the IEDC and receive IEDC written approval prior to publication. Communications should include appropriate reference to the IEDC as an investor, partner and/or sponsor of the program or initiative that is the subject of this Agreement, including the use of the IEDC logo and IEDC social media tags and reference to IEDC social media accounts. All communications required under this paragraph shall be sent to the IEDC Vice President of Marketing.

## **7. GOVERNING LAW.**

- (A) This Agreement shall be governed by, construed, and enforced in accordance with the laws of the State of Indiana without regard to principles of choice of law. Suit, if any, must be brought in the State of Indiana and the venue for any court action shall be in the superior court of Marion County, Indiana.
- (B) If any section, paragraph, term, condition, or provision of this Agreement is found, by a court of competent jurisdiction, to be invalid or unenforceable, or if any paragraph, term, condition, or provision is found to violate or contravene the laws of the State of Indiana, then the section, paragraph, term, condition, or provision so found will be deemed severed from this Agreement, but all other sections, paragraphs, terms, conditions, and provisions will remain in full force and effect.
- (C) The Contractor understands that this Agreement is a public record subject to request pursuant to Indiana Code § 5-14-3 and its exemptions. Use by the public of the information contained in this Agreement shall not be considered an act of the IEDC or the State.

## **8. TERMINATION & FUNDING CANCELLATION.**

- (A) This Agreement may be terminated by the IEDC whenever, for any reason, with or without cause, the IEDC determines that such termination is in its best interest. Termination of services shall be effected by delivery to the Contractor of a termination notice at least thirty (30) days prior to the termination effective date, specifying the extent to which performance of services under such termination becomes effective. The Contractor shall

be compensated for services properly rendered prior to the effective date of termination. The IEDC will not be liable for services performed after the effective date of termination. The Contractor shall be compensated for services herein provided, but in no case shall total payment made to the Contractor exceed the original Agreement price or shall any price increase be allowed on individual line items if canceled in whole or in part prior to the original termination date.

- (B) When the Director of the State Budget Agency makes a written determination that funds are not appropriated or otherwise available to support continuation of performance of this Agreement, this Agreement shall be cancelled. A determination by the Budget Director that funds are not appropriated or otherwise available to support continuation of performance shall be final and conclusive.

## **9. PROGRESS REPORTS.**

The Contractor shall submit written progress reports to the IEDC upon request and as provided in **Exhibit A**. The progress reports shall serve the purpose of assuring the IEDC that work is progressing in a timely manner, and that completion can be reasonably assured on the scheduled date. The Contractor shall submit progress reports to the IEDC at [reports@iedc.in.gov](mailto:reports@iedc.in.gov).

## **10. ACCESS TO RECORDS & AUDITS.**

- (A) The Contractor and its subcontractors, if any, shall maintain all books, documents, papers, accounting records, and other evidence pertaining to all costs incurred under this Agreement. The Contractor shall make such materials available at its respective office at all reasonable times during this Agreement, and for three (3) years from the date of final payment under this Agreement, for inspection by the IEDC or by any other authorized representative of the State. Copies thereof shall be furnished at no cost to the IEDC or by any other authorized representative of state government if requested.
- (B) The Contractor acknowledges that it may be required to submit to an audit of funds paid through this Agreement. Any such audit shall be conducted in accordance with Indiana Code § 5-11-1 *et seq.* and any audit guidelines specified by the IEDC.

## **11. THE CONTRACTOR'S SERVICES.**

- (A) The Contractor recognizes that the services to be performed under this Agreement are vital to the IEDC and must be continued without interruption and that, upon the expiration of this Agreement, a successor, either the IEDC or another contractor, may continue them. The Contractor agrees to use its best efforts and cooperation to effect an orderly and efficient transition to a successor to provide the services contemplated hereby. This Agreement shall be deemed to be substantially performed only when fully performed according to its terms and conditions and any written modifications thereof.

- (B) The Contractor shall not commence any additional services or change the scope of services unless and until authorized in writing by the IEDC. No claim for additional compensation or any change to the budget shall be made. This Agreement may only be amended, supplemented or modified by a written document executed in the same manner as this Agreement.
- (C) The Contractor shall execute its responsibilities by following and applying at all times the highest professional and technical guidelines and standards. The Contractor represents that it has or shall obtain at its own expense all personnel, materials, and equipment required to perform the services under this Agreement. All of the work performed hereunder shall be performed by the Contractor or under its supervision. The Contractor warrants that all personnel assigned to perform the services or other consultants or subcontractors engaged by the Contractor to perform the services are fully qualified and authorized to perform such services under state and local laws. If the IEDC becomes dissatisfied with the work product of, or the working relationship with, any individuals assigned to work under this Agreement, the IEDC may request in writing the replacement of any or all such individuals, and the Contractor shall grant such request.
- (D) The IEDC shall, at all reasonable times, have the right to inspect the work, services or performance of the Contractor. The Contractor shall furnish all reasonable aid and assistance required by the IEDC for proper examination of the work or services. Such inspection shall not relieve the Contractor of any obligation to perform said services in accordance with the law or with this Agreement.

## **12. OWNERSHIP OF DOCUMENTS & MATERIALS.**

- (A) All documents, records, programs, applications, data, algorithms, film, tape, articles, memoranda, and other materials (the "Materials") not developed or licensed by the Contractor prior to execution of this Contract, but specifically developed pursuant to or in connection with this Contract shall be considered "work for hire" and the Contractor hereby transfers and assigns any ownership claims to the IEDC so that all Materials will be the property of the IEDC. If ownership interest in the Materials cannot be assigned to the IEDC, the Contractor grants the IEDC a non-exclusive, non-cancelable, perpetual, worldwide royalty-free license to use the Materials and to use, modify, copy and create derivative works of the Materials.
- (B) Use of these materials, other than as necessary for the performance of this Agreement by the Contractor, without the prior written consent of the IEDC, is prohibited. The Contractor shall take such action as is necessary under law to preserve the IEDC's rights in and to the work product or intellectual property while such property is within the control and/or custody of the Contractor. During the performance of this Agreement, the Contractor shall be responsible for any loss of or damage to these materials developed for or supplied by the IEDC and used to develop or assist in the services provided while the materials are in the possession of the Contractor. Any loss or damage thereto shall be restored at the

Contractor's expense. The Contractor shall provide the IEDC full, immediate, and unrestricted access to the work product during the term of this Agreement.

### **13. COMPLIANCE WITH LAWS.**

- (A) The Contractor agrees to comply with all applicable federal, state and local laws, rules, regulations and ordinances, and all provisions required thereby to be included herein are hereby incorporated by reference. The enactment or modification of any applicable state or federal statute or the promulgation of regulations thereunder after execution of this Agreement shall be reviewed by the IEDC and the Contractor to determine whether the provisions of this Agreement require formal modification.
- (B) The Contractor and its agents shall abide by all ethical requirements that apply to persons who have a business relationship with the State of Indiana, as set forth in Indiana Code § 4-2-6, Indiana Code § 4-2-7, the regulations promulgated thereunder, and Executive Order 04-08, dated April 27, 2004. If the Contractor is not familiar with these ethical requirements, the Contractor should refer any questions to the Indiana State Ethics Commission, or visit the website of the Indiana Inspector General at <http://www.in.gov/ig/>. If the Contractor or its agents violate any applicable ethical standards, the IEDC may, in its sole discretion, terminate this Agreement immediately upon notice to Contractor. In addition, the Contractor may be subject to penalties under Indiana Code § 4-2-6, Indiana Code § 4-2-7, Indiana Code § 35-44.1-1-4 and under any other applicable laws.
- (C) The Contractor certifies by entering into this Agreement that neither it nor its principal(s) is presently in arrears in payment of its taxes, permit fees or other statutory, regulatory or judicially required payments to the State of Indiana or to the IEDC. Further, the Contractor agrees that any payments in arrears and currently due to the State of Indiana or to the IEDC may be withheld from payments due to the Contractor. Additionally, further work or payments may be withheld, delayed, or denied and/or this Agreement suspended until the Contractor is current in its payments and has submitted proof of such payment to the IEDC.
- (D) The Contractor warrants that it has no current or outstanding criminal (including pending), civil, or enforcement actions initiated by the State of Indiana and agrees that it will immediately notify the IEDC of any such actions. During the term of such actions, the Contractor agrees that the IEDC may delay, withhold, or deny work under any supplement, amendment, change order, or other contractual device issued pursuant to this Agreement.
- (E) If a valid dispute exists as to the Contractor's liability or guilt in any action initiated by the IEDC or the State of Indiana or its agencies, and the IEDC decides to delay, withhold, or deny work to Contractor, Contractor may request that it be allowed to continue, or receive work, without delay.
- (F) Any payments that the IEDC may delay, withhold, deny, or apply under this Paragraph 13 shall not be subject to penalty or interest under Indiana Code § 5-17-5.

- (G) The Contractor warrants that the Contractor and its subcontractors, if any, shall obtain and maintain all required permits, licenses, and approvals, and shall comply with all health, safety, and environmental statutes, rules, or regulations applicable in connection with the services provided under this Agreement. Failure to do so is a material breach of this Agreement and grounds for immediate termination of this Agreement and denial of further work with the IEDC. The IEDC shall not be required to reimburse the Contractor for any services performed when Contractor or its employees or subcontractors were not or are not in compliance with such applicable standards, laws, rules or regulations. If licensure, certification or accreditation expires or is revoked, Contractor shall notify the IEDC immediately, and the IEDC, at its option, may immediately terminate this Agreement.
- (H) The Contractor affirms that, if it is an entity described in Title 23 of the Indiana Code, it is properly registered and owes no outstanding reports to the Indiana Secretary of State.

**14. COMPLIANCE WITH TELEPHONE SOLICITATIONS ACT.**

As required by Indiana Code § 5-22-3-7:

- (A) The Contractor and any principals of the Contractor certify that:
  - (1) The Contractor, except for de minimis and nonsystematic violations, has not violated the terms of:
    - (a) Indiana Code § 24-4.7 [Telephone Solicitation of Consumers];
    - (b) Indiana Code § 24-5-12 [Telephone Solicitations]; or
    - (c) Indiana Code § 24-5-14 [Regulation of Automatic Dialing Machines] in the previous three hundred sixty-five (365) days, even if Indiana Code § 24-4.7 is preempted by federal law; and
  - (2) The Contractor will not violate the terms of Indiana Code § 24-4.7 for the duration of this Agreement, even if Indiana Code § 24-4.7 is preempted by federal law.
- (B) The Contractor and any principals of the Contractor certify that an affiliate or principal of the Contractor and any agent acting on behalf of the Contractor or on behalf of an affiliate or principal of the Contractor:
  - (1) Except for de minimis and nonsystematic violations, has not violated the terms of Indiana Code § 24-4.7 in the previous three hundred sixty-five (365) days, even if Indiana Code § 24-4.7 is preempted by federal law; and
  - (2) Will not violate the terms of Indiana Code § 24-4.7 for the duration of this Agreement, even if Indiana Code § 24-4.7 is preempted by federal law.

**15. DRUG-FREE WORKPLACE CERTIFICATION.**



As required by Executive Order No. 90-5 dated April 12, 1990, issued by the Governor of Indiana, the Contractor hereby covenants and agrees to make a good faith effort to provide and maintain a drug-free workplace. The Contractor will give written notice to the IEDC within ten (10) days after receiving actual notice that the Contractor, or an employee of the Contractor in the State of Indiana, has been convicted of a criminal drug violation occurring in the workplace. False certification or violation of this certification may result in sanctions including, but not limited to, suspension of contract payments, termination of this Agreement and/or debarment of contracting opportunities with the State for up to three (3) years.

In addition to the provisions of the above paragraph, if the total amount set forth in this Agreement is in excess of \$25,000.00, the Contractor certifies and agrees that it will provide a drug-free workplace by:

- (A) Publishing and providing to all of its employees a statement notifying them that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the Contractor's workplace, and specifying the actions that will be taken against employees for violations of such prohibition;
- (B) Establishing a drug-free awareness program to inform its employees of (1) the dangers of drug abuse in the workplace; (2) the Contractor's policy of maintaining a drug-free workplace; (3) any available drug counseling, rehabilitation and employee assistance programs; and (4) the penalties that may be imposed upon an employee for drug abuse violations occurring in the workplace;
- (C) Notifying all employees in the statement required by subparagraph (A) above that as a condition of continued employment, the employee will (1) abide by the terms of the statement; and (2) notify the Contractor of any criminal drug statute conviction for a violation occurring in the workplace no later than five (5) days after such conviction;
- (D) Notifying the State in writing within ten (10) days after receiving notice from an employee under subdivision (C)(2) above, or otherwise receiving actual notice of such conviction;
- (E) Within thirty (30) days after receiving notice under subdivision (C)(2) above of a conviction, imposing the following sanctions or remedial measures on any employee who is convicted of drug abuse violations occurring in the workplace: (1) taking appropriate personnel action against the employee, up to and including termination; or (2) requiring such employee to satisfactorily participate in a drug abuse assistance or rehabilitation program approved for such purposes by a federal, state or local health, law enforcement, or other appropriate agency; and
- (F) Making a good faith effort to maintain a drug-free workplace through the implementation of subparagraphs (A) through (E) above.

**16. NONDISCRIMINATION.**

Pursuant to Indiana Code § 22-9-1-10 and the Civil Rights Act of 1964, the Age Discrimination in Employment Act and the Americans with Disabilities Act, the Contractor and its subcontractors, if any, shall not discriminate against any employee or applicant for employment relating to this Agreement with respect to the hire, tenure, terms, conditions, or privileges of employment or any matter directly or indirectly related to employment, because of the employee or applicant's race, color, religion, sex, age disability, national origin or ancestry or status as a veteran, or any other characteristic protected by federal, state, or local law. Breach of this covenant may be regarded as a material breach of this Agreement. Acceptance of this Agreement also signifies compliance with applicable federal and state laws and regulations prohibiting the aforementioned discrimination in the provision of services.

**17. NOTICE TO PARTIES.**

(A) Whenever any notice, statement, or other communication (“**Notice**”) is required under this Agreement, it shall be sent to the following address, unless otherwise advised in writing:

(1) Notices to the IEDC shall be sent to:

INDIANA ECONOMIC DEVELOPMENT CORPORATION  
Attn: General Counsel  
One North Capitol Avenue, Suite 700  
Indianapolis, IN 46204-2288  
reports@iedc.in.gov

(2) Notices to the Contractor shall be sent to:

GUIDESOFT, INC. D.B.A. KNOWLEDGE SERVICES  
Attn: Legal Department  
9800 Crosspoint Boulevard  
Indianapolis, IN 46256  
katieb@knowledgeservices.com

(B) Any change in the Contractor's contact information must be provided in writing by the Contractor to the IEDC in accordance with this Paragraph 17.

(C) Notice shall be provided via electronic mail to the Contractor's electronic mail address and via certified, registered, or first-class U.S. mail. Notice shall be deemed delivered upon dispatch.

**18. SUBCONTRACTS, ASSIGNMENT & KEY PERSONS.**

(A) The Contractor shall not assign or subcontract the whole or any part of this Agreement without the prior written consent of the IEDC. The Contractor agrees to bind all subcontractors, successors and assignees to all the terms and conditions of this Agreement. The Contractor shall specifically require each subcontractor, if any, who has access to the

IEDC's confidential information in the course of performing any services to be bound by the confidentiality provisions in Paragraph 5 of this Agreement and, at the IEDC's discretion, to execute a non-disclosure agreement that is satisfactory to the IEDC.

**19. INDEMNIFICATION.**

The Contractor shall indemnify, defend, and hold harmless the IEDC and the State of Indiana and their respective agents, officers, employees and representatives from all third party claims and suits for loss or damage to property, including the loss of use thereof, and injuries to or death of persons, including without limitation any officers, agents, employees, and representatives of the Contractor or its subcontractor(s), and from all judgments recovered therefrom and for expenses in defending any such claims or suits, including court costs, attorneys' fees, and for any other expenses caused by an act or omission of the Contractor and/or subcontractor(s), agents, officers, or employees in connection with performance of this Agreement. The IEDC shall not provide such indemnification to Contractor.

**20. DEBARMENT & SUSPENSION.**

- (A) The Contractor certifies, by entering into this Agreement, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from entering into this Agreement by any federal agency, branch of government, or by any department, agency, or political subdivision of the State of Indiana. The term "principal" for purposes of this Agreement means an officer, director, owner, partner, key employee, or other person with primary management of supervisory responsibilities, or a person who has a critical influence on or substantive control over the operations of the Contractor.
- (B) The Contractor certifies that it has verified the state and federal suspension and debarment status for all subcontractors receiving funds under this Agreement and shall be solely responsible for any recoupment, penalties, or costs that might arise from use of a suspended or debarred subcontractor. The Contractor shall immediately notify the IEDC if any subcontractor becomes debarred or suspended, and shall, at the IEDC's request, take all steps required by the IEDC to terminate its contractual relationship with the subcontractor for work to be performed under this Agreement.

**21. ATTORNEYS' FEES & INTEREST.**

The IEDC will in good faith perform its required obligations hereunder and does not agree to pay any penalties, liquidated damages, interest, attorneys' fees, court costs, or litigation expenses, except as required by Indiana law, in part, Indiana Code § 5-17-5, Indiana Code § 34-54-8, Indiana Code § 34-13-1, and Indiana Code § 34-52-2-3. Notwithstanding the provisions contained in Indiana Code § 5-17-5, the parties stipulate and agree that any liability resulting from the IEDC's failure to make prompt payment shall be based solely on the amount of funding originating from the State of Indiana and shall not be based on funding from federal or other sources.

## 22. MISCELLANEOUS.

- (A) No right conferred on either party under this Agreement shall be deemed waived and no breach of this Agreement excused, unless such waiver or excuse is in writing and signed in advance by the party claiming to have waived such right. Neither the IEDC's review, approval, or acceptance of, nor payment for the services required under this Agreement shall be construed to operate as a waiver of any rights under this Agreement or of any cause of action arising out of the performance of this Agreement, and the Contractor shall be and remain liable to the IEDC in accordance with applicable law for all damages to the IEDC caused by the Contractor's negligent performance of any of the services furnished under this Agreement.
- (B) This Agreement constitutes the entire agreement between the parties. No understandings, agreements, or representations, oral or written, not specified within this Agreement will be valid provisions of this Agreement. This Agreement may not be modified, supplemented, or amended, in any manner, except by written agreement signed by all necessary parties.
- (C) This Agreement may be executed through an original or electronically, and in duplicates or through counterparts, each of which shall be deemed to be an original, and all of which shall constitute but one and the same Agreement.
- (D) Both parties hereto, in the performance of this Agreement, shall act in an individual capacity and not as agents, employees, partners, joint venturers or associates of one another. The employees or agents of one party shall not be deemed or construed to be the employees or agents of the other party for any purposes whatsoever. Neither party will assume liability for any injury (including death) to any persons, or damage to any property arising out of the acts or omissions of the agents, employees or subcontractors of the other party.
- (E) Nothing in this Agreement shall be construed to confer any rights or remedies on any third party not a signatory to this Agreement, including, the employees or sub-contractors of the Contractor.
- (F) If the IEDC determines that it would be in the IEDC's best interest to hire an employee of the Contractor, the Contractor will release the selected employee from any non-compete agreements that may be in effect. This release will be at no cost to the IEDC or to the employee.
- (G) The IEDC is exempt from state, federal, and local taxes. The IEDC will not be responsible for any taxes levied on the Contractor as a result of this Agreement.
- (H) This Agreement was reviewed and/or revised by legal counsel for the IEDC and the Contractor, and no presumption or rule that any ambiguity shall be construed against the

party drafting the document shall apply to the interpretation or enforcement of this Agreement.

**23. INSURANCE.**

The Contractor shall secure and keep in force during the term of this Agreement the insurance coverage required by law and as would be reasonable to cover claims of any nature which may arise out of or result from this Agreement. The Contractor shall furnish a certificate of insurance and all endorsements to the IEDC prior to the commencement of work under this Agreement.

**24. AUTHORITY TO BIND CONTRACTOR.**

Notwithstanding anything in this Agreement to the contrary, the signatory for the Contractor represents that he/she has been duly authorized to execute contracts on behalf of the Contractor and has obtained all necessary or applicable approvals from the home office of the Contractor to make this Agreement fully binding upon the Contractor when his/her signature is affixed and is not subject to home office acceptance hereto when accepted by the IEDC.

**25. INFORMATION TECHNOLOGY ACCESSIBILITY STANDARDS.**

If the Contractor provides any information technology-related products or services to the IEDC, the Contractor shall comply with all Indiana Office of Technology (IOT) standards, policies, and guidelines, which are available online at <http://iot.in.gov/architecture/>. The Contractor specifically agrees that all hardware, software, and services provided to or purchased by the IEDC shall be compatible with the principles and goals contained in the electronic and information technology accessibility standards adopted under Section 508 of the Federal Rehabilitation Act of 1973 (29 U.S.C. 794d) and Indiana Code § 4-13.1-3. Any deviation from these architecture requirements must be approved in writing by IOT in advance. The IEDC may terminate this Agreement for default if the Contractor fails to cure a breach of this provision within a reasonable time.

**26. DISPUTES.**

- (A) Should any disputes arise with respect to this Agreement, the Contractor and the IEDC agree to act immediately to resolve such disputes. Neither party shall be required to submit to binding arbitration for the resolution of disputes. Time is of the essence in the resolution of disputes.
- (B) The Contractor agrees that, the existence of a dispute notwithstanding, it will continue, without delay, to carry out all of its responsibilities under this Agreement that are not affected by the dispute. Should the Contractor fail to continue to perform its responsibilities regarding all non-disputed work or services, without delay, any additional costs incurred by the IEDC or the Contractor as a result of such failure to proceed shall be borne by the Contractor, and the Contractor shall make no claim against the IEDC for such costs.

**27. ORDER OF PRECEDENCE; INCORPORATION BY REFERENCE.**

Any inconsistency or ambiguity in this Agreement shall be resolved by giving precedence in the following order: (1) this Agreement; (2) exhibits/attachments prepared by the IEDC; and (3) exhibits/attachments prepared by the Contractor.

**28. AGREEMENT MODIFICATIONS.**

Only the following paragraphs of this Agreement were added, deleted, or modified during construction and/or negotiation of this Agreement.

**29. NON-COLLUSION & ACCEPTANCE.**

The undersigned attests, subject to the penalties for perjury, that the undersigned is the properly authorized representative, agent, member, or officer of the Contractor. Further, to the undersigned's knowledge, neither the undersigned nor any other member, employee, representative, agent, or officer of the Contractor, directly or indirectly, has entered into or been offered any sum of money or other consideration for the execution of this Agreement other than that which appears upon the face hereof.

*Signatures on Following Page -- Remainder of Page Intentionally Left Blank*

In Witness Whereof, the Contractor and the IEDC have, through duly authorized representatives, entered into this Agreement. The parties, having read and understand the foregoing terms of this Agreement, do by their respective signatures dated below hereby agree to the terms thereof.

**GUIDESOFT, INC. D.B.A. KNOWLEDGE SERVICES**

*Katie Belange*

Signature

Katie Belange, General Counsel

Printed Name and Position/Title

Date: 4/18/2023

**INDIANA ECONOMIC DEVELOPMENT CORPORATION**

**David Rosenberg, Chief Operating Officer**

**(Digital Signature Stamp Below)**



5.3.2023

**STATE BUDGET AGENCY**

*Jack Henderson*  
Jack Henderson (May 17, 2023 13:41 EDT)

on Behalf of

Zachary Q. Jackson  
Director

Date: May 17, 2023



# Defense Procurement Accelerator Phase I Proposal

*prepared for the*

**Indiana**  
Economic Development Corp<sup>®</sup>

*by*

Knowledge Service

April 2023



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## **Introduction and Phase I Goals**

The Indiana Economic Development Corporation's (IEDC) Defense Procurement Accelerator (DPA) is designed to support Indiana businesses so that they can grow their market share within the Defense market.

To support the DPA's overall goals of expanding Indiana companies' market share, the IEDC is seeking services and technology that can accelerate Indiana's share of the defense market.

Below, Knowledge Services, in partnership with GovShop, outline a proposal for achieving the first phase of goals for the DPA. Priorities and scope for subsequent phases will be discussed and collaboratively developed with IEDC during Phase I.

The Knowledge Services team brings expertise, technology, and value-added services required to help the IEDC advance this critical initiative in an agile manner.

Collectively, we have:

- Decades of experience helping government agencies "scout" for technologies and companies
- Comprehensive market data including on suppliers, demand, and tech
- Proven AI-enabled tools for market intelligence that have been used to map out supplier bases and supply chains
- Over two decades of project management solutions for government covering a wide breadth of services
- A team of Subject Matter Experts who can assist in guiding Indiana companies to form strategic teaming partnerships and relationships to go after DoD contracts

Given the rapid pace of activity in the defense market, we will provide an agile approach and rapidly go live with this initiative, so Indiana companies are well positioned to capture a larger share of defense contracts.

## **Project Management Approach and Scope**

Knowledge Services will provide the overall project management services of the DPA and be the point of contact for stakeholders. To ensure the DPA success, we will oversee and provide the following activities:

- Alignment on goals, objectives, and desired outcomes from the perspective of key stakeholders and customers
- Succinct and continuous communication to ensure efficient execution
- Understanding current state and desired state
- Agile approach that delivers results from the outset while incorporating lessons learned
- Incorporation of change management considerations
- On-going program measurement, reporting, and advising





## **Technical Approach and Scope**

Through our discussions with the IEDC, the following are the three main components expected in the first phase of the DPA:

- Create a DPA landing page to serve as (1) an overview of the DPA and its purpose, and (2) provide a queries form for Indiana companies, leveraging the GovShop Dataset
  - GovShop Dataset will be leveraged by the Knowledge Services Program Team and is not designed to be public facing
- Enable Indiana companies to submit queries for teaming partners (primes, non-traditionals, academics, new entrants)
  - Queries will come from Indiana companies through a form, available on the DPA landing page, submitted to the Knowledge Services Program Team
  - Knowledge Services, leveraging the GovShop Dataset, will respond to inquiries from Indiana companies and aggregate responses in accordance with pre-determined service level agreements
- Plan for next phases of the DPA in order to capture larger share of defense market

To support the objectives of Phase I, we have outlined 3 specific Tasks below:

- I. Project Plan and Project Management
- II. GovShop Dataset
- III. DPA Landing Page + Queries Form

### **Task I: Project Plan and Project Management**

Knowledge Services will leverage the project management industry standards and best practice techniques of progressive elaboration to regularly refine and update the project schedule. As the project develops and more information is uncovered regarding project conditions, we will breakdown work packages and tasks into a more detailed set of activities. The Project Plan will be updated as needed.

- We will hold an initial kickoff meeting with IEDC team members to confirm objectives and desired outcomes. Through this meeting we will have a detailed understanding of what success will look like. These goals will become the primary means by which we can measure progress and results.
- We will review approach and tasks, including any required communication, data calls and engagement with stakeholders required to execute the tasks. Based on the input provided, we will revise the approach, if needed.
- We will set up a cadence for regular check-ins and communication protocols. By establishing a set of meetings and approach to any outreach and communication, we will ensure a coordinated approach and avoid any inefficiencies and issues.

#### **Project Planning for Subsequent Phases**

As we execute Tasks II and III, we will hold one to two workshops to plan out subsequent phases for implementation of the DPA. This will include:

- Long-term project plan that is in sync with other critical initiatives and priorities of IEDC
- Specific next steps to drive implementation

These workshops will ensure a long-term plan to maximize impact is in place even as Indiana companies start to derive immediate benefits through Phase I.





## Task II: GovShop Dataset

### Comprehensive Data and AI Leveraged for Dataset

The **GovShop Dataset** is a one-time static pull of data which maps:

- Indiana Suppliers across the ten critical technology domains prioritized by the Department of Defense
- Indiana labs, research institutions, and academia engaged in critical tech and federal government initiatives
- Indiana small business support and entrepreneurial support resources
- Indiana venture capital and funding sources
- Indiana experts advising companies on federal government

To complete the Dataset, we leverage several key data and AI assets as depicted below in Figure 1.

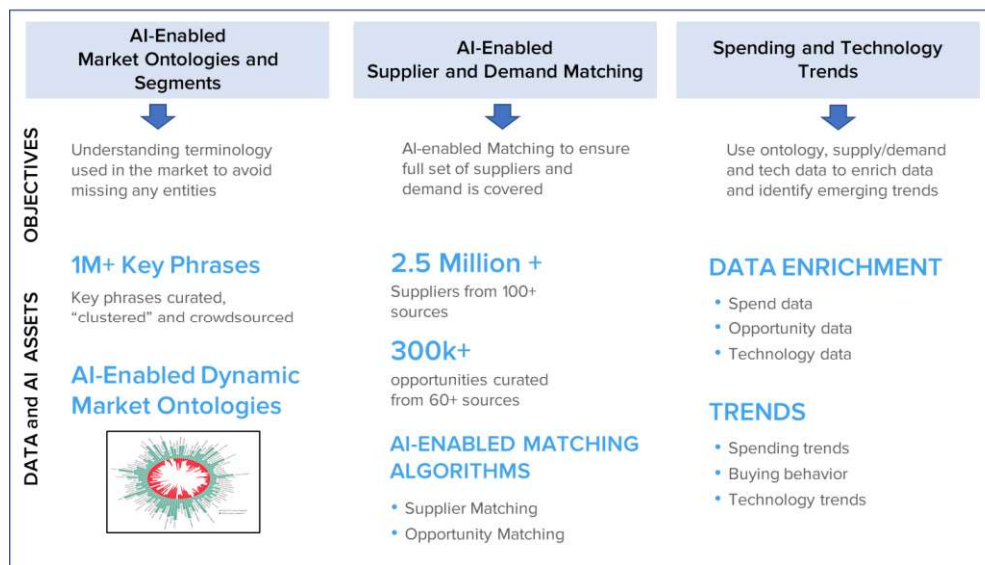


Figure 1: Leveraging AI and Data Assets for Indiana DPA Dataset

These assets include:

- **Supply, Demand, and Technology data integrated from 200+ Market Intelligence Datasets** including 1) 2.5 million traditional and emerging suppliers, 2) past spending, 3) contracts, 4) patent and technology data, and 5) experts and scientific research.
- **AI-Enabled "Market Ontologies" and Segments** that are critical to identifying suppliers and related data. Ontologies are used to identify related words (e.g., drones vs. unmanned aerial vehicles) and how they relate to each other. This ensures no matter which terminology is used by government or suppliers, the AI algorithms can uncover suppliers with specific types of capabilities.
- **AI-Enabled Supplier and Demand Matching** to match suppliers and solicitations for any given market.
- **Spend and Technology Trends**, identified through pattern recognition large sets of patents, technology, and all supply/demand data.



**Match and Research Indiana companies within sectors** - We will identify all Indiana companies for each sector as follows:

- Run Supplier Match within GovShop to match all Indiana companies already included in GovShop
- Conduct additional research to identify companies.
- Gather additional data on companies as needed to allow the team to rank companies based on criteria.

**Task III: DPA Landing Page + Queries Form**

**Build DPA Landing Page**

In order to provide prioritized companies as well as other audiences a gateway to understanding the DPA and access resources, we will build a landing page. The objective of the page is to provide an overview of the DPA and how different parties can best work with the DPA.

Through a discovery session with IEDC, we will outline the specific content of the pages. We envision the contents to include:

- Overview of DPA and its purpose
- Queries Form

Given the MVP nature of the site, the primary goal will be to stand up a site with the capability of expansion over time or replaced at a future date after Phase I.

**Project Schedule**

Project Schedule		
Task	Deliverable	Timeline
Project Management	Phase I Project Oversight	Weeks 1 – 4
	Weekly Project Status Updates	Weeks 1 – 4
Technology Implementation	Execute GovShop Dataset of Indiana Defense Ecosystem	Weeks 2 – 3
	Customized DPA Platform Landing Page and Queries Form	Weeks 2 – 4
Reporting	Uncover reporting requirements with Key Stakeholders	Ongoing

Table 1: Project Schedule

**Reporting**

Knowledge Services will include access to data and reporting, including ad hoc reporting. During discovery, we will determine the needs and requirements for the IEDC and Indiana companies within the DPA. We will work with the Stakeholders to deliver reports on a periodic, quarterly, monthly, and ad hoc basis, based upon the Stakeholder’s requirements.





## Pricing

Knowledge Services proposes a milestone pricing structure for Phase I. An additional SOW will be provided based on key activities and outcomes from discovery sessions conducted during Phase I.

Pricing	
Milestone 1 (Week 2)	\$75,000
Milestone 2 (Week 4)	\$75,000
Total	\$150,000

Table 2: Pricing

## Period of Performance

The Period of Performance is May 1<sup>st</sup>, 2023, through October 31<sup>st</sup>, 2023.












# Guidesoft, Inc (dba knowledge Service) (PSA) (424524) expire 9.30.23

Final Audit Report

2023-05-17

Created:	2023-05-04
By:	Glenda Reitz 7EE (GReitz@iedc.IN.gov)
Status:	Signed
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-  Document created by Glenda Reitz 7EE (GReitz@iedc.IN.gov)  
2023-05-04 - 10:40:26 AM GMT
-  Document emailed to rpaglia@iedc.in.gov for signature  
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-  Email viewed by rpaglia@iedc.in.gov  
2023-05-04 - 1:00:35 PM GMT
-  Signer rpaglia@iedc.in.gov entered name at signing as Robert J. Paglia  
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-  Document e-signed by Robert J. Paglia (rpaglia@iedc.in.gov)  
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-  Document emailed to jhenderson3@sba.in.gov for signature  
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-  Signer jhenderson3@sba.in.gov entered name at signing as Jack Henderson  
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-  Document e-signed by Jack Henderson (jhenderson3@sba.in.gov)  
E-signature obtained using URL retrieved through the Adobe Acrobat Sign API  
Signature Date: 2023-05-17 - 5:41:09 PM GMT - Time Source: server
-  Agreement completed.  
2023-05-17 - 5:41:09 PM GMT