

MASTER SERVICES AGREEMENT  
BY AND BETWEEN  
THE TEXAS A&M UNIVERSITY SYSTEM  
AND IDEAL-LOGIC, LLC

This Services Agreement (“Agreement”) is entered into and effective September 15, 2023 (the “Effective Date”), by and between The Texas A&M University System, an agency of the state of Texas (hereafter referred to as “A&M SYSTEM”), and Ideal-Logic, LLC, a limited liability company in the State of Oregon (hereafter referred to as “PROVIDER”). A&M SYSTEM and PROVIDER are sometimes hereafter referred to as “Party” individually or “Parties” collectively.

A&M SYSTEM and PROVIDER hereby agree as follows:

**1. SCOPE OF WORK**

- A. This Agreement is not a contract to perform specific work but is intended to establish the terms and conditions under which the A&M SYSTEM and its member universities and agencies (hereafter referred to as “Member” or “Members”) may enter into a contract individually with the PROVIDER to license and use PROVIDER’s platform and/or other services set forth in Exhibit A of this Agreement (“Services”) by executing an order form or purchase order (each an “Order Form”) with PROVIDER. Participating Members can be found in Exhibit A, attached hereto. The Services requested by Member shall be delivered and/or licensed by PROVIDER to Member during the term of this Agreement in accordance with the rights, obligations and pricing set forth herein.
- B. The terms of this Agreement shall be incorporated into any Order Form executed by a Member and PROVIDER for delivery and/or license by PROVIDER of the Services during the term of this Agreement and the Order Form shall reference this Agreement. Upon execution of such Order Form, such Member is only responsible for its own compliance with the terms and conditions of this Agreement.

**2. TERM AND TERMINATION**

- A. The term of this Agreement begins on the Effective Date and continues for a period of one-year unless earlier terminated as provided herein; provided, however, that the terms of this Agreement shall remain applicable to any Order Form that was executed prior to the expiration or termination of this Agreement but whose period of performance extends beyond the expiration or termination of this Agreement. This Agreement may be extended for four (4) additional one (1) year periods upon mutual written agreement executed by the Parties.
- B. Either Party may terminate this Agreement effective upon written notice to the other Party if the other Party materially breaches any term of this Agreement and fails to cure such breach within 30 (30) days after receiving written notice of the breach. Furthermore, A&M SYSTEM may terminate this Agreement at any time upon 30 (30) days prior notice to PROVIDER.
- C. The period of performance of any Order Form will be as provided in the Order Form. Either party to the Order Form may terminate such Order Form effective upon written notice to the other party if the other party materially breaches any term of this Agreement or the Order Form and fails to cure such breach within 15 (15) days after

receiving written notice of the breach. In the event that the Member terminates the Order Form pursuant to this Section, the Member shall receive a pro-rata refund of any pre-paid fees. Furthermore, Member may terminate the Order Form at any time upon 30 (30) days prior notice to PROVIDER. The termination of any one Order Form will not affect any other Order Form or this Agreement.

### **3. PAYMENT TERMS**

- A. The A&M SYSTEM shall not pay any costs or fees as a direct result of this Agreement. The fees paid by Member to PROVIDER for the Services requested under the Order Form, shall be calculated based on the fee rate schedule attached as Exhibit B and made a part of this Agreement. The rate schedule may be renegotiated at the discretion of A&M SYSTEM upon renewal of this Agreement. Additional rates and fees may be negotiated on a Member specific Order Form, provided no less favorable than under this Agreement.
- B. PROVIDER shall invoice Member for amounts due consistent with the payment schedule as negotiated under the Order Form. Each invoice must reference the Order Form and Member's purchase order number (if applicable) and include a description of services provided along with documentation that Member may reasonably request to support the invoice amount. Member will make payment on a properly prepared and submitted invoice in accordance with Chapter 2251, Texas Government Code (the "Texas Prompt Payment Act"), which shall govern remittance of payment and remedies for late payment and non-payment.
- C. As applicable, for reasonable business-related travel, lodging and/or meal expenses validly incurred directly and solely in support of the Services and approved by Member in advance, PROVIDER will be reimbursed by Member according to the State of Texas rates, rules, and regulations (<https://fmx.cpa.texas.gov/fmx/travel/texttravel/rates/current.php>). When requesting such reimbursement, PROVIDER will submit to Member receipts, invoices and other documentation as required by Member. Under no circumstances will PROVIDER be reimbursed for alcohol purchases. State travel rates are subject to change without notice and will be adjusted accordingly. Mileage rates will be calculated from point-to-point (PROVIDER's place of business to job site) using the State of Texas mileage. Should the Agreement be renewed for an additional term, travel reimbursement amounts will be renegotiated at that time.
- D. All payments will be made by electronic direct deposit. PROVIDER is required to complete and submit to Member a Vendor Direct Deposit Authorization form prior to the first payment request. The form can be accessed at: <https://www.tamus.edu/business/budgets-and-accounting/accounting/general/>.

### **4. INTELLECTUAL PROPERTY**

- A. PROVIDER shall retain all rights, title, and interest in and to the Services. PROVIDER represents and warrants that: (i) it has the full right, power, and authority to grant the rights and licenses to Members; (ii) the Services do not infringe upon or violate any copyright, patent, trademark, or other proprietary or intellectual property rights of any third party; (iii) the Services will perform substantially in accordance with PROVIDER's marketing materials and documentation, including without limitation, any user guides,

technical specifications, training materials, instructions, documented policies or other written materials regarding the Services that are posted, delivered or otherwise made available by PROVIDER to Members; and (iv) PROVIDER and each of its employees, subcontractors, or agents who will perform the Services has the necessary knowledge, skill, experience, and qualifications to provide and perform the Services in accordance with this Agreement, and the Services will be performed for and delivered to Members in a diligent, professional, workmanlike manner in accordance with industry standards.

- B. PROVIDER shall indemnify and hold harmless the A&M SYSTEM, Members, and their regents, employees, and agents (collectively, the "A&M System Indemnitees") from any Claim arising from or related to (i) an allegation that any of the Services infringe upon or violate the intellectual property rights of a third party ("Infringement Claim") or (ii) PROVIDER's breach of any of its representations or warranties in this Agreement. If the Services become or are likely to become the subject of an Infringement Claim, then PROVIDER may, at its expense and option, either: (a) replace or modify the Services to make them non-infringing, while maintaining equivalent functionality; (b) procure for the Members the right to continue using the Services pursuant to this Agreement; or (c) terminate this Agreement and refund the Members, on a pro-rata basis, the amount of any pre-paid fees.

## 5. CONFIDENTIALITY

- A. The Parties anticipate that under this Agreement it may be necessary for a Party (the "Disclosing Party") to transfer information of a confidential nature ("Confidential Information") to the other Party (the "Receiving Party"). The Disclosing Party shall clearly identify Confidential Information at the time of disclosure by (i) appropriate stamp or markings on the document exchanged, or (ii) written notice, with attached listings of all material, copies of all documents, and complete summaries of all oral disclosures (under prior assertion of the confidential nature of the same) to which each notice relates, delivered within thirty (30) days of the disclosure to the other party. "Confidential Information" does not include information that: (i) is or becomes publicly known or available other than as a result of a breach of this Agreement by the Receiving Party; (ii) was already in the possession of the Receiving Party as the result of disclosure by an individual or entity that was not then obligated to keep that information confidential; (iii) the Disclosing Party had disclosed or discloses to an individual or entity without confidentiality restrictions; or (iv) the Receiving Party had developed or develops independently before or after the Disclosing Party discloses equivalent information to the Receiving Party.
- B. The Receiving Party shall use the same reasonable efforts to protect the Disclosing Party's Confidential Information as it uses to protect its own confidential information of a similar nature. The Receiving Party may only disclose Confidential Information to its personnel having a need to know the Confidential Information to fulfill the Receiving Party's obligations under this Agreement. The Receiving Party may not reproduce, disclose, or use Confidential Information except in performing its obligations under this Agreement. If the Receiving Party is legally required to disclose Confidential Information, the Receiving Party shall, to the extent allowed by law, promptly give the Disclosing Party written notice of the requirement so as to provide the Disclosing Party a reasonable opportunity to pursue appropriate process to prevent or limit the disclosure. If the Receiving Party complies with the terms of this Section, disclosure of that portion of the

Confidential Information, which the Receiving Party is legally required to disclose, will not constitute a breach of this Agreement.

- C. The Receiving Party shall, upon request of the Disclosing Party, promptly return or destroy all materials embodying Confidential Information other than materials in electronic backup systems or otherwise not reasonably capable of being readily located and segregated without undue burden or expense, except that the Receiving Party may securely retain one (1) copy in its files solely for record purposes. The Receiving Party's obligations as to Confidential Information will survive the termination or expiration of this Agreement for a period of three (3) years.

## **6. COMPLIANCE WITH LAWS**

- A. PROVIDER shall comply with all federal, state, and local laws, rules, and regulations applicable to the performance of its obligations under this Agreement.
- B. Each Party shall comply with U.S. export control regulations. If either Party desires to disclose to the other Party any information, technology, or data that is identified on any U.S. export control list, the disclosing Party shall advise the other Party at or before the time of intended disclosure and may not provide export-controlled information to the other Party without the written consent of the other Party. PROVIDER certifies that none of its personnel participating in the activities under this Agreement is a "restricted party" as listed on the Denied Persons List, Entity List, and Unverified List (U.S. Department of Commerce), the Debarred Parties Lists (U.S. Department of State), the Specially Designated Nationals and Blocked Persons List (U.S. Department of Treasury), or any similar governmental lists.
- C. If applicable, for purposes of the Family Educational Rights and Privacy Act ("FERPA"), Member hereby designates PROVIDER as a school official with a legitimate educational interest in any education records (as defined in FERPA) that PROVIDER is required to create, access, receive, or maintain in order to fulfill its obligations under this Agreement. PROVIDER shall comply with FERPA as to any such education records and is prohibited from redisclosure of the education records except as provided for in this Agreement or otherwise authorized by FERPA or Member in writing. PROVIDER is only permitted to use the education records for the purpose of fulfilling its obligations under this Agreement and shall restrict disclosure of the education records solely to those employees, subcontractors or agents who have a need to access the education records for such purpose. PROVIDER shall require any such subcontractors or agents to comply with the same restrictions and obligations imposed on PROVIDER in this Section, including without limitation, the prohibition on redisclosure. PROVIDER shall implement and maintain reasonable administrative, technical, and physical safeguards to secure the education records from unauthorized access, disclosure or use.

## **7. INDEMNIFICATION**

PROVIDER shall indemnify and hold harmless the A&M System Indemnitees from and against any third-party claim, damage, liability, expense or loss asserted against the A&M System Indemnitees (each, a "Claim") arising out of (i) PROVIDER's negligent or willful errors or omissions under this Agreement, or (ii) PROVIDER's breach of any representation or warranty contained herein.

## **8. INSURANCE**

Insurance requirements as stated within Exhibit C, attached hereto.

## 9. INFORMATION TECHNOLOGY

- A. **Electronic and Information Resources.** PROVIDER represents and warrants that the electronic and information resources and all associated information, documentation, and support that it provides to A&M SYSTEM and Members under this Agreement (collectively, the “EIRs”) comply with the applicable requirements set forth in Title 1, Chapter 213 of the Texas Administrative Code and Title 1, Chapter 206 of the Texas Administrative Code (as authorized by Chapter 2054, Subchapter M of the Texas Government Code) (the “EIR Accessibility Warranty”). If PROVIDER becomes aware that the EIRs, or any portion thereof, do not comply with the EIR Accessibility Warranty, PROVIDER shall, at no cost to A&M SYSTEM and Members, either (1) perform all necessary remediation to make the EIRs satisfy the EIR Accessibility Warranty or (2) replace the EIRs with new EIRs that satisfy the EIR Accessibility Warranty. In the event that PROVIDER fails or is unable to do so, A&M SYSTEM and Members may immediately terminate this Agreement, and PROVIDER will refund to A&M SYSTEM and Members all amounts paid by A&M SYSTEM and Members under this Agreement within thirty (30) days following the effective date of termination.
- B. **Access to Agency Data.** Pursuant to Section 2054.138, Texas Government Code, PROVIDER shall implement and maintain appropriate administrative, technical, and physical security measures, including without limitation, the security controls available at <https://cyber-standards.tamus.edu>, as may be amended from time to time (the “Security Controls”), to safeguard and preserve the confidentiality, integrity, and availability of A&M SYSTEM Data (as defined below). PROVIDER shall periodically provide A&M System and Members with evidence of its compliance with the Security Controls within thirty (30) days of A&M System or Member’s request.
- C. **Cloud Computing Services.** As of the Effective Date, PROVIDER represents and warrants that it complies with the then-current requirements of the risk and authorization management program established by the Texas Department of Information Resources (“TX-RAMP”). Pursuant to Section 2054.0593, Texas Government Code, PROVIDER shall maintain RAMP compliance and certification, as may be amended from time to time, throughout the Term, including any renewal term of this Agreement. PROVIDER shall provide A&M System and Members with evidence of its TX-RAMP compliance and certification within thirty (30) days of A&M System and Members request and at least thirty (30) days prior to the start of any renewal term of this Agreement. In the event that PROVIDER fails to maintain TX-RAMP compliance and certification throughout the Term, including any Renewal Term, A&M System and Members may immediately terminate this Agreement, and PROVIDER will provide a refund to A&M System and Members of any prepaid fees.
- D. **Data Privacy.**
- i. The A&M System or the applicable Member shall retain all right, title, and interest in and to all information, data or other content that the A&M System, the Members or its users enter, submit or upload to Services or otherwise provide to PROVIDER under this Agreement (collectively, the “A&M System Data”)
  - ii. PROVIDER shall hold A&M SYSTEM Data in confidence. PROVIDER shall only use or disclose A&M SYSTEM Data for the purpose of fulfilling PROVIDER’s obligations

under this Agreement, as required by law, or as otherwise authorized in writing by A&M SYSTEM or the applicable Member. PROVIDER shall restrict disclosure of the A&M SYSTEM Data solely to those employees, subcontractors or agents of PROVIDER that have a need to access the A&M SYSTEM Data in order for PROVIDER to perform its obligations under this Agreement. PROVIDER shall require any such subcontractors or agents to comply with the same restrictions and obligations imposed on PROVIDER in this Agreement.

- iii. PROVIDER shall, within two (2) business days of discovery, report to A&M SYSTEM or the applicable Member any use or disclosure of A&M SYSTEM Data not authorized by this Agreement or in writing by A&M SYSTEM or the applicable Member. PROVIDER's report must identify: (a) the nature of the unauthorized use or disclosure, (b) the A&M SYSTEM Data used or disclosed, (c) who made the unauthorized use or received the unauthorized disclosure, (d) what PROVIDER has done or will do to mitigate any deleterious effect of the unauthorized use or disclosure, and (e) what corrective action PROVIDER has taken or will take to prevent future similar unauthorized use or disclosure. PROVIDER shall provide such other information, including a written report, as reasonably requested by A&M SYSTEM or the applicable Member.
- iv. PROVIDER must promptly notify A&M SYSTEM or the applicable Member of any legal request for A&M SYSTEM Data from a third party and take (and assist A&M SYSTEM or Member in taking) appropriate steps not to disclose such A&M SYSTEM Data.
- v. Within thirty (30) days of the expiration or termination of this Agreement or an Order Form, PROVIDER, as directed by A&M SYSTEM or the applicable Member, shall return all A&M SYSTEM Data in its possession (or in the possession of any of its subcontractors or agents) to A&M SYSTEM or the applicable Member.

## 10. MISCELLANEOUS

- A. **Entire Agreement.** This Agreement constitutes the entire and only agreement between the Parties hereto and supersedes any prior understanding, written or oral agreements between the Parties, or "side deals" which are not described in this Agreement. This Agreement may be amended only by a subsequent written agreement signed by authorized representatives of both parties. In the event of a conflict between the terms of this Agreement and any other documents constituting part of this Agreement, the terms of this Agreement shall control.
- B. **Authority to Contract.** Each Party represents and warrants that it has full right, power and authority to enter into and perform its obligations under this Agreement, and that the person signing this Agreement is duly authorized to enter into this Agreement on its behalf.
- C. **Representations & Warranties.** If PROVIDER is a business entity, PROVIDER warrants, represents, covenants, and agrees that it is duly organized, validly existing and in good standing under the laws of the state of its incorporation or organization and is duly authorized and in good standing to conduct business in the State of Texas, that it has all necessary power and has received all necessary approvals to execute and deliver this

Agreement, and the individual executing this Agreement on behalf of PROVIDER has been duly authorized to act for and bind PROVIDER.

- D. **Independent Contractor.** Notwithstanding any provision of this Agreement to the contrary, the Parties hereto are independent contractors. No employer-employee, partnership, agency, or joint venture relationship is created by this Agreement or by PROVIDER's Service to A&M SYSTEM and Members. Except as specifically required under the terms of this Agreement, PROVIDER (and its representatives, agents, employees and subcontractors) will not represent themselves to be an agent or representative of A&M SYSTEM or Members. As an independent contractor, PROVIDER is solely responsible for all taxes, withholdings, and other statutory or contractual obligations of any sort, including but not limited to workers' compensation insurance. PROVIDER and its employees shall observe and abide by all applicable A&M SYSTEM and Members policies, regulations, rules and procedures, including those applicable to conduct on its premises.
- E. **Use of Name.** Each Party acknowledges that all rights in any trademarks, service marks, slogans, logos, designs, and other similar means of distinction associated with that Party (its "Marks"), including all goodwill pertaining to the Marks, are the sole property of that Party. Neither Party may use the Marks of the other without the advance written consent of that Party, except that each Party may use the name of the other Party in factual statements that, in context, are not misleading. The Parties will mutually agree in advance upon any public announcements, or communications to the media regarding this Agreement or the Services to be provided pursuant to this Agreement.
- F. **Non-Assignment.** PROVIDER shall neither assign its rights nor delegate its duties under this Agreement without the prior written consent of A&M SYSTEM or Members.
- G. **Severability.** In case any one or more of the provisions contained in this Agreement shall, for any reason, be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provisions hereof, and this Agreement shall be construed as if such invalid, illegal, and unenforceable provision had never been contained herein. The Parties agree that any alterations, additions, or deletions to the provisions of the Agreement that are required by changes in federal or state law or regulations are automatically incorporated into the Agreement without written amendment hereto and shall become effective on the date designated by such law or by regulation.
- H. **Survival.** Any provision of this Agreement that may reasonably be interpreted as being intended by the Parties to survive the termination or expiration of this Agreement will survive the termination or expiration of this Agreement.
- I. **Force Majeure.** Neither Party shall be held liable or responsible to the other Party nor be deemed to have defaulted under or breached this Agreement for failure or delay in fulfilling or performing any obligation under this Agreement if and to the extent such failure or delay is caused by or results from causes beyond the affected Party's reasonable control, including, but not limited to, acts of God, strikes, riots, flood, fire, epidemics, natural disaster, embargoes, war, insurrection, terrorist acts or any other circumstances of like character; provided, however, that the affected Party has not caused such force majeure event(s), shall use reasonable commercial efforts to avoid or remove such causes of nonperformance, and shall continue performance hereunder with reasonable dispatch whenever such causes are removed. Either Party shall provide the other Party with

prompt written notice of any delay or failure to perform that occurs by reason of force majeure, including describing the force majeure event(s) and the actions taken to minimize the impact of such event(s).

- J. **Notices.** Any notice required or permitted under this Agreement must be in writing, and shall be deemed given: (i) three (3) business days after it is deposited and post-marked with the United States Postal Service, postage prepaid, certified mail, return receipt requested, (ii) the next business day after it is sent by overnight carrier, (iii) on the date sent by email transmission with electronic confirmation of receipt by the party being notified, or (iv) on the date of delivery if delivered personally. A&M SYSTEM and PROVIDER can change their respective notice address by sending to the other Party a notice of the new address. Notices should be addressed as follows:

A&M SYSTEM:           The Texas A&M University System  
301 Tarrow St., Suite 273  
College Station, Texas 77840  
Attention: Jeff Zimmermann  
Phone: (979) 458-6410  
E-mail: [jzimmermann@tamus.edu](mailto:jzimmermann@tamus.edu)

PROVIDER:               Ideal-Logic, LLC  
101 SW Western Blvd., Suite 104  
Corvallis, OR 97333  
Attention: Paul Bollmann  
Phone: 541-230-1087  
Email: [paul@ideal-logic.com](mailto:paul@ideal-logic.com)

- K. **Governing Law.** The validity of this Agreement and all matters pertaining to this Agreement, including but not limited to, matters of performance, non-performance, breach, remedies, procedures, rights, duties, and interpretation or construction, shall be governed and determined by the Constitution and the laws of the State of Texas.
- L. **Venue.** Pursuant to Section 85.18(b), *Texas Education Code*, mandatory venue for all legal proceedings against A&M SYSTEM or Members is to be in the county in which the principal office of A&M SYSTEM's or Member's governing officer is located.
- M. **Non-Waiver.** A&M SYSTEM and Members are an agency of the state of Texas and under the Constitution and the laws of the state of Texas possesses certain rights and privileges, is subject to certain limitations and restrictions, and only has authority as is granted to it under the Constitution and the laws of the state of Texas. PROVIDER expressly acknowledges that A&M SYSTEM and Members are an agency of the state of Texas and nothing in this Agreement will be construed as a waiver or relinquishment by A&M SYSTEM and Members of their right to claim such exemptions, remedies, privileges, and immunities as may be provided by law, including the sovereign immunity of A&M SYSTEM and Members.
- N. **Dispute Resolution.** To the extent that Chapter 2260, Texas Government Code is applicable to this Agreement, the dispute resolution process provided in Chapter 2260, and the related rules adopted by the Texas Attorney General pursuant to Chapter 2260, shall be used by A&M SYSTEM, Members and PROVIDER to attempt to resolve any claim for breach of contract made by PROVIDER that cannot be resolved in the ordinary course



of business. PROVIDER shall submit written notice of a claim of breach of contract under this Chapter to the Contracts Officer of A&M SYSTEM or the applicable Member, who shall examine PROVIDER's claim and any counterclaim and negotiate with PROVIDER in an effort to resolve the claim. This provision and nothing in this Agreement waives A&M SYSTEM's or Member's sovereign immunity to suit or liability, and A&M SYSTEM and Members have not waived their right to seek redress in the courts.

- O. **Public Information Act.** PROVIDER acknowledges that A&M SYSTEM and Members are obligated to strictly comply with the Public Information Act, Chapter 552, Texas Government Code, in responding to any request for public information pertaining to this Agreement, as well as any other disclosure of information required by applicable Texas law. Upon A&M SYSTEM's and Member's written request, PROVIDER will promptly provide specified contracting information exchanged or created under this Agreement for or on behalf of A&M SYSTEM or Members to A&M SYSTEM or Members in a non-proprietary format acceptable to A&M SYSTEM or Members that is accessible by the public. PROVIDER acknowledges that A&M SYSTEM and Members may be required to post a copy of the fully executed Agreement on its Internet website in compliance with Section 2261.253(a)(1), Texas Government Code. The requirements of Subchapter J, Chapter 552, Texas Government Code, may apply to this Agreement and PROVIDER agrees that this Agreement can be terminated if PROVIDER knowingly or intentionally fails to comply with a requirement of that subchapter.
- P. **Certification Regarding Business with Certain Countries and Organizations.** PROVIDER represents and warrants that it is not engaged in business with Iran, Sudan, or a foreign terrorist organization, as prohibited by Section 2252.152, Texas Government Code. PROVIDER acknowledges this Agreement may be terminated immediately if this certification is inaccurate.
- Q. **Delinquent Child Support Obligations.** A child support obligor who is more than 30 days delinquent in paying child support and a business entity in which the obligor is a sole proprietor, partner, shareholder, or owner with an ownership interest of at least 25 percent is not eligible to receive payments from state funds under an agreement to provide property, materials, or services until all arrearages have been paid or the obligor is in compliance with a written repayment agreement or court order as to any existing delinquency. Under Section 231.006, Texas Family Code, PROVIDER certifies that it is not ineligible to receive the payments under this Agreement and acknowledges that this Agreement may be terminated and payment may be withheld if this certification is inaccurate.
- R. **Payment of Debt or Delinquency to the State.** Pursuant to Sections 2107.008 and 2252.903, Texas Government Code, PROVIDER agrees that any payments owing to PROVIDER under this Agreement may be applied directly toward certain debts or delinquencies that PROVIDER owes the State of Texas or any agency of the State of Texas regardless of when they arise, until such debts or delinquencies are paid in full.
- S. **State Auditor's Office.** PROVIDER understands that acceptance of funds under this Agreement constitutes acceptance of the authority of the Texas State Auditor's Office, or any successor agency (collectively, "Auditor"), to conduct an audit or investigation in connection with those funds pursuant to Section 51.9335(c), Texas Education Code. PROVIDER agrees to cooperate with the Auditor in the conduct of the audit or

investigation, including without limitation, providing all records requested. PROVIDER will include this provision in all contracts with permitted subcontractors.

- T. **HUB Subcontracting Plan.** It is the policy of the state of Texas, A&M SYSTEM and Members to encourage the use of Historically Underutilized Businesses (“HUB”) in our contracts, purchasing transactions and through subcontracting opportunities. The goal of the HUB program is to promote equal access and equal opportunity to HUB vendors in A&M SYSTEM and Member contracting and purchasing. PROVIDER has indicated it will not subcontract any of its duties or obligations under this Agreement. If PROVIDER will subcontract any of its duties and obligations under this Agreement, PROVIDER will be required to provide prior written notice to A&M SYSTEM and Members and make a good faith effort to submit a HUB subcontracting plan as required under Section 20.285 of the Texas Administrative Code.
- U. **Prohibition on Contracts with Companies Boycotting Israel.** To the extent that Chapter 2271, Texas Government Code, is applicable to this Agreement, PROVIDER certifies that (a) it does not currently boycott Israel, and (b) it will not boycott Israel during the Term of this Agreement. PROVIDER acknowledges this Agreement may be terminated and payment withheld if this certification is inaccurate.
- V. **Verification Regarding Discrimination Against Firearm Entities and Trade Associations.** To the extent that Chapter 2274, Texas Government Code, is applicable to this Agreement, PROVIDER verifies that (1) it does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association, and (2) will not discriminate during the term of this Agreement against a firearm entity or firearm trade association.
- W. **Verification Regarding Boycotting Energy Companies.** To the extent that Chapter 2274, Texas Government Code, is applicable to this Agreement, PROVIDER verifies that (1) it does not boycott energy companies, and (2) it will not boycott energy companies during the term of this Agreement. PROVIDER acknowledges this Agreement may be terminated and payment withheld if this verification is inaccurate.
- X. **Loss of Funding.** Performance by A&M SYSTEM and Members under this Agreement may be dependent upon the appropriation and allotment of funds by the Texas State Legislature (the “Legislature”). If the Legislature fails to appropriate or allot the necessary funds, A&M SYSTEM and Members will issue written notice to PROVIDER and A&M SYSTEM and Members may terminate this Agreement without further duty or obligation hereunder. PROVIDER acknowledges that appropriation of funds is beyond the control of A&M SYSTEM and Members. In the event of a termination or cancellation under this Section, A&M SYSTEM and Members will not be liable to PROVIDER for any damages that are caused or associated with such termination or cancellation.
- Y. **Prior Employment.** PROVIDER acknowledges that Section 2252.901, Texas Government Code, prohibits A&M SYSTEM and Members from using state appropriated funds to enter into an employment contract, a professional services contract under Chapter 2254, or a consulting services contract under Chapter 2254 with individual who has been previously employed by A&M SYSTEM and Members during the twelve (12) month period immediately prior to the effective date of the Agreement. If PROVIDER is an individual, by signing this Agreement, PROVIDER represents and warrants that it is not a former or retired employee of A&M SYSTEM or Members that was employed by A&M SYSTEM or

Members during the twelve (12) month period immediately prior to the effective date of the Agreement.

- Z. **Conflict of Interest.** PROVIDER certifies, to the best of their knowledge and belief, that no member of the A&M System’s Board of Regents, nor any officer of A&M SYSTEM or Members, has a direct or indirect financial interest in PROVIDER or in the transaction that is the subject of the Agreement.
- AA. **Franchise Tax Certification.** If PROVIDER is a taxable entity subject to the Texas Franchise Tax (Chapter 171, *Texas Tax Code*), then PROVIDER certifies that it is not currently delinquent in the payment of any franchise (margin) taxes or that PROVIDER is exempt from the payment of franchise (margin) taxes.
- BB. **Not Eligible for Rehire.** PROVIDER is responsible for ensuring that its employees involved in any work being performed for A&M SYSTEM or Members under this Agreement have not been designated as “Not Eligible for Rehire” as defined in System policy 32.02, *Discipline and Dismissal of Employees*, Section 4 (“NEFR Employee”). In the event A&M SYSTEM or Member becomes aware that PROVIDER has a NEFR Employee involved in any work being performed under this Agreement, A&M SYSTEM or Member will have the sole right to demand removal of such NEFR Employee from work being performed under this Agreement. Non-conformance to this requirement may be grounds for termination of this Agreement by A&M SYSTEM or Member.

IN WITNESS WHEREOF, the Parties have entered into this Agreement as of the Effective Date.



**The Texas A&M University System**

DocuSigned by:  
BY:   
BEDCDB89EA78479...

Name: Billy Hamilton

Title: Deputy Chancellor

Date: 9/20/2023

**Ideal-Logic, LLC**

DocuSigned by:  
BY:   
D241673ED3E343C...

Name: PAUL BOLLMANN

Title: Vice President

Date: 9/20/2023

**Exhibit A – Participant Registration System**

See Attached - TAMU - Ideal-Logic Participant Registration System Proposal 9.12.2023

**Exhibit B – Youth Safety & Compliance System**

See Attached TAMU - Ideal-Logic Youth Safety and Compliance System Proposal

NOTE: The pricing for this system will be without the Main Campus.

### **Exhibit C – Insurance**

Respondent shall obtain and maintain, for the duration of any resultant agreement or longer, the minimum insurance coverage set forth below. With the exception of Professional Liability (E&O), all coverage shall be written on an occurrence basis. All coverage shall be underwritten by companies authorized to do business in the State of Texas or eligible surplus lines insurers operating in accordance with the Texas Insurance Code and have a financial strength rating of A- or better and a financial strength rating of VII or better as measured by A.M. Best Company or otherwise acceptable to A&M System. By requiring such minimum insurance, A&M System shall not be deemed or construed to have assessed the risk that may be applicable to Respondent under any resultant agreement. Respondent shall assess its own risks and if it deems appropriate and/or prudent, maintain higher limits and/or broader coverage. Respondent is not relieved of any liability or other obligations assumed pursuant to any resultant agreement by reason of its failure to obtain or maintain insurance in sufficient amounts, duration, or types. No policy will be canceled without unconditional written notice to A&M System at least ten days before the effective date of the cancellation.

#### **Coverage**

#### **Limit**

#### **A. Worker's Compensation**

Statutory Benefits (Coverage A)	Statutory
Employers Liability (Coverage B)	\$1,000,000 Each Accident
	\$1,000,000 Disease/Employee
	\$1,000,000 Disease/Policy Limit

Workers' Compensation policy must include under Item 3.A. on the information page of the workers' compensation policy the state in which work is to be performed for A&M System. Workers' compensation insurance is required, and no "alternative" forms of insurance will be permitted.

#### **B. Automobile Liability**

Business Auto Liability Insurance covering all owned, non-owned or hired automobiles, with limits of not less than \$1,000,000 Single Limit of liability per accident for Bodily Injury and Property Damage;

If a separate Business Auto Liability policy is not available, coverage for hired and non-owned auto liability may be endorsed on the Commercial General Liability policy.

#### **C. Commercial General Liability**

Each Occurrence Limit	\$1,000,000
General Aggregate Limit	\$2,000,000
Products / Completed Operations	\$1,000,000
Personal / Advertising Injury	\$1,000,000
Damage to rented Premises	\$300,000
Medical Payments	\$5,000

The required commercial general liability policy will be issued on a form that insures Respondent's or its subcontractors' liability for bodily injury (including death), property damage, personal and advertising injury assumed under the terms of any resultant agreement.

#### **Additional Endorsements**

The Auto and Commercial General Liability Policies shall name the Texas A&M University System

Board of Regents for and on behalf of The Texas A&M University System as additional insured's.

**D. Cyber Liability**

PROVIDER shall procure and maintain, for the duration of this Agreement and for such length of time as is necessary to cover any and all claims, cyber liability insurance with limits not less than \$2,000,000 per occurrence or claim, \$2,000,000 aggregate. The cyber liability policy shall be sufficiently broad to cover PROVIDER's duties and obligations under this Agreement and include coverage for claims involving: invasion of privacy; loss, damage, theft, alteration or other misuse of data; unauthorized exposure or breach of data; privacy event expenses such as mandatory/voluntary notification costs, credit monitoring, call center services, forensic costs, and any other fees, costs, or expenses necessary to comply with any applicable breach notification laws; privacy regulatory proceedings (including fines and penalties); cyber extortion payments; and network security.

**E. Respondent will deliver to A&M System:**

Evidence of insurance on a Texas Department of Insurance approved certificate form verifying the existence and actual limits of all insurance after the execution and delivery of any resultant agreement and prior to the performance of any services by Respondent under any resultant agreement. Additional evidence of insurance will be provided on a Texas Department of Insurance approved certificate form verifying the continued existence of all required insurance no later than thirty (30) days after each annual insurance policy renewal.

**All insurance policies**, with the exception of worker's compensation, employer's liability and professional liability will be endorsed and name The Board of Regents for and on behalf of The Texas A&M University System and The Texas A&M University System as Additional Insureds up to the actual liability limits of the policies maintained by Respondent. Commercial General Liability and Business Auto Liability will be endorsed to provide primary and non-Contributory coverage. The Commercial General Liability Additional Insured endorsement will include on-going and completed operations and will be submitted with the Certificates of Insurance.

**All insurance policies** will be endorsed to provide a waiver of subrogation in favor of The Board of Regents of The Texas A&M University System and The Texas A&M University System. No policy will be canceled without unconditional written notice to A&M System at least ten days before the effective date of the cancellation. **All insurance policies** will be endorsed to require the insurance carrier providing coverage to send notice to A&M System ten (10) days prior to the effective date of cancellation, material change, or nonrenewal relating to any insurance policy required in this Section.

Any deductible or self-insured retention must be declared to and approved by A&M System prior to the performance of any services by Respondent under any resultant agreement. Respondent is responsible to pay any deductible or self-insured retention for any loss. All deductibles and self-insured retentions will be shown on the Certificates of Insurance.

Certificates of Insurance and Additional Insured Endorsements as required by any resultant agreement will be emailed to [soprocurement@tamus.edu](mailto:soprocurement@tamus.edu).

The insurance coverage required by any resultant agreement will be kept in force until all services have been fully performed and accepted by A&M System in writing, except as may be noted.



# Texas A&M University System

## Participant Registration System



Contact: Paul Bollmann  
paul@ideal-logic.com  
(541) 230-1087

Ideal-Logic, LLC  
101 SW Western Blvd., Suite 104  
Corvallis, OR 97333

<http://www.ideal-logic.com>

Sep 12, 2023



Ideal-Logic, LLC  
101 SW Western Blvd., Ste. 104  
Corvallis, OR 97333  
<http://www.ideal-logic.com>

Dear Charles,

Thank you for taking time to review our proposal. Ideal-Logic has been a trusted partner working with youth programs since 2011, when we first started working with KidSpirit on the Oregon State University campus. Here are a few things to keep in mind as you read:

- **We offer a service, not a product.** This is the single biggest advantage you get by using Ideal-Logic. Real-world organizational software problems are complex and intricate, and it takes time, energy, and perseverance (often with wrong turns along the way) to solve them well and realize the benefits. We make as many changes, improvements, upgrades, and rewrites as it takes to produce a solution that truly solves the problem.
- **We love supporting youth programs.** We have been working with youth programs in the United States and Canada since 2011. While we know that every program is unique, we bring strong experience rolling out similar systems to many other youth programs. Similar systems in use elsewhere give us an advantage to get your system up and running quickly. These components will be fully customized to meet Texas A&M University System's needs as part of our service.
- **We are a small company with a big track record of success.** As a small company, our business depends on the success of our partnership with each of our clients. You will be working directly with the developers, and we are personally invested in our projects. Our partnerships have been tremendously successful, because our solution really works, and it works well over time.
- **We enjoy what we do.** We enjoy building systems like this, and we are committed to a great long-term partnership. We look forward to growing with you! Our goal as a company is to serve our amazing clients and to create great sustainable jobs for our community.

We believe that our service, as described in this proposal, will meet your needs as an organization, and we believe that our service will be a great fit for Texas A&M University System going forward.

On behalf of Ideal-Logic, thank you for the opportunity to submit this proposal, and we look forward to a productive partnership with you.

Sincerely,



Damien Forkner  
President

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# About Ideal-Logic



Ideal-Logic was founded in September 2008 with the commitment to create high-quality, affordable custom software applications as a service. We are a small company based in Corvallis, Oregon, near the campus of Oregon State University.

Our technical credentials include decades of experience building and supporting large-scale web-based workflow and data management systems. On the business side, we have many years of customer service experience in industry and academia. Ideal-Logic serves clients in academia and business.

Our systems cover a lot of ground, from complex registration and scheduling to intellectual property. In some domains we are considered de-facto experts, and we are always expanding into new areas. We work with very large (40,000 users) and very small (200 users) clients, and they all receive the same high level of service. In all cases, we have resounding success stories - our approach is proven and effective.

**Damien Forkner** is the creator of the technology behind Ideal-Logic. He has an MS in Computer Science from Stanford University, and both a BS in Computer Science and a BA in Art History from Indiana University.

**Paul Bollmann** is a co-founder who interacts with nearly all of our existing and new clients on a regular basis. He holds a BA in Public Relations from Kansas State University.

**Adam Shields** is a developer with a background in logistics, business development, graphic design, and leadership. He has a BS in New Media Communications from Oregon State University.

**Cedar Dunn** directly supports and proactively communicates with our clients. She holds a BA in Communications from Portland State University.

**Gabriel Janzen** is a developer with a background in computer science and IT. Gabriel recently graduated from Oregon State University with a BS in Computer Science.

**Valerie Bloodsworth** provides support to and advocacy for our clients as a member of the Client Relations team. She holds a Master of Public Administration from The University of Akron.

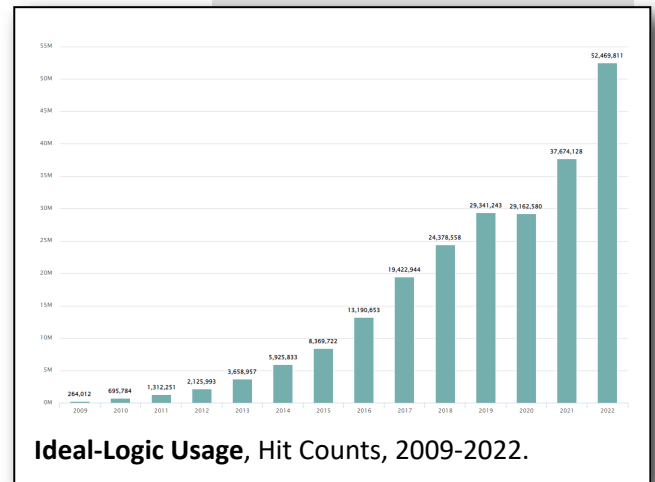
**Brittany Nefcy** is a developer with a background in higher education administration. She holds a BS in Sociology from University of Oregon and a MSE in Higher Education Administration from the University of Kansas.

## Ideal-Logic Values

**We serve the people who change the world with an awesome service.** We work behind the scenes to help our clients succeed. We do this by providing a custom software service that truly solves our clients' complex data and workflow problems. We free them up to focus on changing the world.

**We value the quality of our service over growth or profit.** We don't care what anybody else says. We're doing this the old fashioned way, by working hard and serving the very best way we know how. The clients that use our service are our responsibility and privilege to serve, and there's no other way to look at it.

**We are a company of influence through integrity, honesty, and excellence.** We simply strive to be the very best we can be in all aspects of our business and our relationships. When we mess up, we own up to it. When we don't know the answer, we say so. We focus on the things we can do well.



# About Our Service



Your processes are unique.  
Your software should be, too.

**You get a service, not a product.** *Software the way it was meant to be: it evolves with your organization and your needs.* This is the biggest advantage you get by using Ideal-Logic. In our experience, one-size-fits-all software products work well only in specific cases with a very well-defined problem set (e.g. MS Word). Real-world organizational software problems can be massively complex and intricate, and it takes time, energy, and perseverance (often with many wrong turns along the way) to truly solve them and realize the benefits. For many of our clients, we make hundreds or even thousands of changes over the first few years. Our entire business is oriented to provide this service and reach the end goal of a software solution that truly solves the problem.

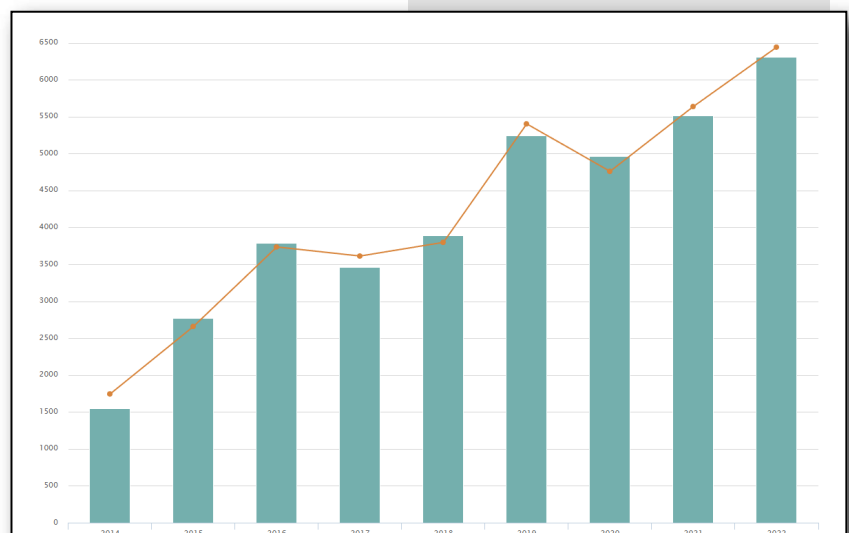
**It's about more than just the technology.** *Real-world experience really makes a difference.* Your organization and process are unique, but there's also no need to reinvent the wheel. We have found that the hardest part of automating processes for a business isn't always the technology (although that's hard); it's identifying and refining the best way of doing things. Our experience doing this for organizations across a variety of domains helps us (and you) get to the right answer as quickly as possible.

**You don't have to pay for individual changes.** *As many changes as you need for one low service price.* Pricing custom software is really hard. The problem is that software can't just be built and then abandoned. It needs to change - frequently. We often joke that our clients don't know what they really need until they have what they don't need in their hands. This is why we negotiate a clear service price up front, and we provide unlimited changes and fixes within the scope of the contract. With our service model, you can just call us and tell us what needs to be better, and we have the freedom to say "Great idea! We'll get to work on it."

## Response Times

In the last five years we have resolved over 23,000 requests from our customers, including new features, improvements, tweaks, and fixes. Of these 23,000 completed requests:

- 28% were resolved in less than 2 hours,
- 50% were resolved in less than 24 hours,
- 71% were resolved in less than 1 week, and
- 81% were resolved in less than 2 weeks, and
- only 19% required more than 2 weeks to resolve, generally because they were larger projects.



**Client Requests Completed.** This chart shows requests from our clients every year since 2011. The bars represent submitted requests and the line represents resolved requests.

# Company History

Ideal-Logic has been building and deploying custom web applications since its founding in 2008. Our development team has over 30 years of combined experience building and supporting complex workflow and data management systems across a wide range of industries and institutions. Most of our work has been with colleges and universities, but we also do a fair amount of work for private industry. Here is a brief list of some of the different types of systems that we have deployed and continue to support:

- **Youth Safety systems**, including online program/activity/session registrations, tracking staff/volunteer requirements, automated email notifications, dashboards for admins/program directors, customized reporting. Examples include Oregon State, Iowa State, New York University and Clemson Youth Safety Programs among others.
- **Recreation management and outdoor program systems**, including online activity and class registrations, pass sales, personal training, locker and towel rentals and reservations, trip planning, inventory management, sport club support, and equipment and gear rentals. Examples include Stanford Recreation, Oregon State's Faculty Staff Fitness and Club Sports programs, and various systems at Whitman College, Middlebury College, and University of Manitoba - Mini-U Program.
- **Children's program registration systems**, including online registration, scheduling, staff management and hiring, printable outputs such as name tags and special concerns lists. Examples include KidSpirit and Healthy Youth Program at OSU and CEISMC at Georgia Tech.
- **Trip planning systems** for university outdoor adventure programs, including online registration and travel planning, risk management, and reporting. Examples include the Adventure Leadership Institute at OSU and similar programs at Stanford, Colorado College, Whitman College, and Middlebury College.
- **Curriculum tracking systems** to track student progress towards certificates or levels in academic programs. Examples include the Oregon Master Naturalist program, Oregon Parenting Educators Collaborative at OSU, and College of Engineering Leadership Program at OSU and other academic programs at Ohio State, Colorado College, and University of Oregon.
- **Scholarship and funding application systems** that provide online application, complex review processes, and award management. Examples include the Academic Dean's Office at Colorado College and numerous online registration systems with scholarship processes.
- **General registration systems** that provide complex registration scenarios and customizable pricing, discounts, and review processes. Examples include Conference Services, Faculty Staff Fitness, Professional and Continuing Education, Extension, and FCH/4-H at OSU, and similar systems at Colorado College, Whitman College, Middlebury College, University of Oregon, and elsewhere.
- A complete **vendor management and procurement and contracting system** for University of Oregon that generates contracts, registers vendors, organizes review processes and tracks all UO matters (e.g. procurements, purchase orders, etc...).
- **Student organization management and event planning** at OSU for Student Leadership and Involvement, CFSL, RecSports, and the Center for Civic Engagement. Includes event planning, travel planning, membership management, and service hour tracking.
- **Teaching and education tools** that make up the Braincandy platform, an online real-time student/professor interaction system at Arizona State.
- **Real-time judging and scoring systems** for cheerleading events in the United States, UK, and Ireland.
- **Training and learning management systems** for private industry companies.

Many of these systems are very different, but our unique platform and service approach allow improvements for one client to help everyone else. Our solutions have been proven to work across many domains. Many of our clients have been with us for years, and we continue to partner with them each year to improve, refine, and expand the capabilities of the systems they use. In the last five years, we have resolved over 23,000 requests for changes, improvements, new features, and fixes for our clients across all of our systems.

# Overview

The Ideal-Logic participant registration system will be configured for the Texas A&M University System to allow participants to register for various programming.

The system will be used across universities to allow participants (or parents/guardians) to log in and select different programs and register for them. **Each university will have a separate participant registration system configured independent of each other.**

Program Staff (e.g., Instructors, Staff, Presenters, etc.) will have access within the system to see all the participants who have registered for their program. The program staff will be able to email participants, print rosters and name tags, take attendance and many more features which are outlined in the next pages of this proposal.

**This proposal is for the following Texas A&M University System Universities** that offer the following estimated programming each year:

Prairie View A&M University: 24 camps; 4100 participants  
Texas A&M University-Commerce: 17 camps; 662 participants  
Tarleton State University: 94 camps; 4146 participants  
West Texas A&M University: 50 camps; 6000 participants  
Texas A&M University-Kingsville: 12 camps; 748 participants  
Texas A&M University-Corpus Christi: 100 camps; 3100 participants  
Texas A&M International University: 5 camps; 1500 participants  
Texas A&M University-Central Texas: 3 camps; 58 participants  
Texas A&M University-San Antonio: 15 camps; 600 participants  
Texas A&M University-Galveston: 26 camps; 1650 participants

**This proposal is intended to outline how this system will be used by these universities. There are no license agreements or limits related to administrators or number of users logging into the system.**

**Any universities beyond the ones listed in this proposal can be added on for an additional charge.** See Page 43: *System Pricing Details* for details.

**One or two admins will be the point people for each university and will facilitate communication and feature requests between Ideal-Logic and these universities.** The pricing in this proposal is dependent on university admins being trained up to use the system and provide frontline support to their customers and end-users. Ideal-Logic will support these university admins through regularly scheduled group meetings talking through what is working and what needs to be adjusted or fixed.

These following sections are meant to provide an overview of the general functionality of the registration system along with other system level features and then we will work together with your group to provide a customized solution that is tailored to your processes.

# Features (1/4)



The Ideal-Logic registration system is designed for the creation of events, sessions, workshops, application forms, or other forms for customers online within the system. These items can be created by program administrators in the system. These items can be configured to collect custom information from participants. Participants (and Guardians, if applicable) will log into the system, fill out a form, and then submit it. In this section, the term 'Registration Item' will be used for an application, registration form, intake form, etc. that someone can submit.

## General Overview

Ideal-Logic's registration features and processes are well-developed, well-used, and easily customizable. Many process options and variations are available. Here are some of the general features available for registration:

### Gathering User Information

- Fully customizable registration forms
- Medical history options
- Insurance details
- Contact information
- University affiliation
- Demographics
- Custom questions

### Organization

- Participants log-in to browse available registration items, and register
- Registration URLs for websites to provide direct registration links
- Simple copying to re-use registration forms and past registration items (spreadsheet upload of registration items is available)
- Flexible scheduling system linked to system calendar
- Assignment process options to divide and distribute registrants among a set of other registration items with the ability to do Mass Assignment
- Lottery/selection processes in manual, full-automated, or semi-automated modes
- Registration for one participant or groups of participants
- Multiple registration form options per registration item when necessary

## Instructor/Staff Tools

- Instructor login to provide details and instructor bios
- View and print rosters and registration data
- Send email messages to participants (batch or individual)
- Print name tags, attendance sheets, and other paper documents
- Track and record attendance
- Record grades or completion status
- Award or print certificates
- Release grades, completion status, and certificates to participants
- Record and track notes about participants

## Administrator Tools

- Administrator login to monitor processes, view reports on all data, communicate with instructors, create and schedule new registration items, and make administrative changes
- Availability tracking and waitlist management
- Ability to monitor registrations and adjust section sizes as necessary
- Ability to create custom surveys for participants
- Ability to view and monitor in-progress and cancelled registrations
- Integrated accounting to track payments due, add charges or adjust balances, and report on results

# Features (2/4)

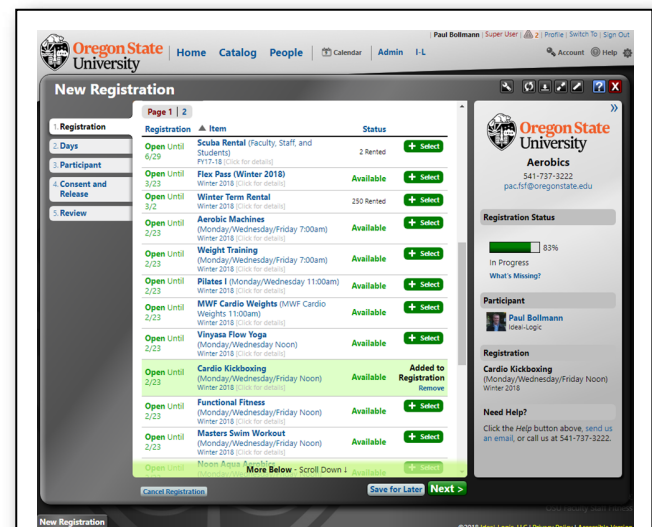
## General Overview Continued Management

- Flexible pricing options, discount codes, and other accounting features
- Flexible completion and attendance tracking, including letter grades, pass/fail, complete/incomplete, etc.
- Certificate option to provide participant-printable certificates upon completion
- Online consent forms, including consent form tracking, re-use, and management
- Online payment via credit card (additional charges for integration may apply)
- Full-featured waitlist functionality (with deposit option)
- Approval process option to require instructor or admin approval before allowing registration
- Custom review process configuration with multiple rounds and reviewer groups in serial or parallel

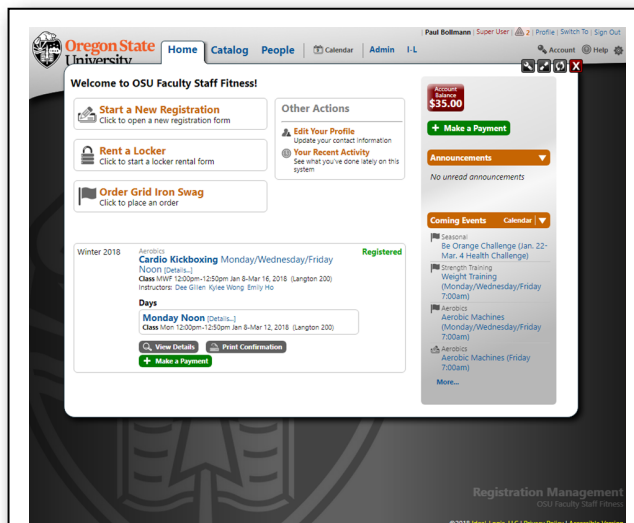
## Registration Process

Participants will log into the system and see available forms. They may enter the system via a general link or a specific link that will automatically open a form with particular applications selected. Multiple forms can be added to one form.

The participant fills out all the required and optional questions in the form and then submits it. They will then receive a confirmation email for their submitted form. The participant can go to their “Participant Home” at any time to see the forms they have submitted.



**Registration Form.** This page allows the participant to select which activities to include in the registration. OSU Faculty Staff Fitness courses shown.



**Participant Home.** Shows New Registration links, balances due, and links to already submitted registration.



# Features (3/4)



## Demographic Information

Ideal-Logic's registration module can be configured to collect any amount of demographic information.

- **User Profiles.** All demographic information entered for or by a participant is stored in their user profile.
- **Demographic Questions.** Within the registration form we have created a set of default demographic questions that can be set to required or optional and added to any registration form. Here is a list:
  - Name
  - Email Address
  - Student ID Number
  - Gender (customizable to client standards)
  - Date of Birth (the system calculates the age of the participant)
  - Race and Ethnicity
  - Household Income
  - Education Level
  - Custom Questions – The ability to create your own demographic questions in addition to the ones above
  - Additional data fields
- **Sensitive Information.** The system has the ability to store any information that you ask for in the registration form. If you intend to ask for and store sensitive information, then we have additional measures to protect specific fields from being seen by unauthorized users (e.g. Social Security Number).
- **Medical Histories.** Medical history data is collected according to special protocols in the system. Many Oregon State clients are collecting medical data with custom Ideal-Logic medical history forms.
- **Answers Remembered.** Answers given by participants are always remembered between registrations so they do not need to be re-entered (they are presented for review, though).

**Contact, Medical History, and Demographic Information Configuration.** Each activity class can have its own configuration, including custom questions, medical histories, and forms.

Name	Gender	Date of Birth	Age	Race	Race Reporting	Ethnicity	Income	Education Level
Kim Student	F	Jul 15, 1995	21	White	White	Not Hispanic or Latino	\$50,000 to \$74,999	Bachelor's degree
Lella Student Advanced Imaging	F	Jan 2, 1999	19	Not Declared		Decline to answer		Decline to answer
Mike Student	M	Feb 15, 1999	18	White	White	Not Hispanic or Latino	\$50,000 to \$74,999	Bachelor's degree
Rebecca Student CH24 HI	F	Oct 12, 1996	21	Hispanic or Latino	Hispanic or Latino	Hispanic or Latino	\$50,000 to \$74,999	Bachelor's degree
Rick Student State of Oregon	M	Mar 15, 1997	20	Black or African American	Black or African American	Not Hispanic or Latino	\$50,000 to \$74,999	Master's degree, PhD or professional degree
Tracy Student	F	Sep 12, 1999	18	Asian	Asian	Not Hispanic or Latino	\$25,000 to \$49,999	Bachelor's degree
Whitney Student	F	Jun 5, 1998	19	White	White	Not Hispanic or Latino	\$50,000 to \$74,999	Master's degree, PhD or professional degree

**Participant Demographics Spreadsheet.** Sample of demographic data output from a simple registration form configured to collect basic demographic data.

## Features (4/4)



**Multiple Participants on the Same Registration.** The registration form can be configured to allow the addition of other participants to the same registration as another participant, though each participant has to register for the exact same form.

- **Usage.** This functionality has been frequently used by our other clients for family registrations (parents, children, and sometimes additional adults) all registering for the same camp.
- **Privacy.** Due to privacy concerns we don't generally allow a participant to search or select other participants in the database not known to be connected to the participant. The system has complex controls embedded to prevent data entered by one participant from being seen by another participant.
- **Participant Home.** If a participant is added to a registration with another person then they will see the registration they are connected to on their "Participant Home" when they log into the system.

### Client Examples

Ideal-Logic registration system components are used by many groups around the country and internationally.

Oregon State University (17 different units), Colorado College (8 different units), Middlebury College Outdoor Education, Whitman College Outdoor Education, University of Oregon Purchasing and Contracting Services and Teaching and Learning Center, Georgia Tech CEISMC and College of Computing, Stanford University Recreation, and many others.

**Carly Weber**, Systems and Registration Manager, OSU Conference Services:

"Conference Services was and still is excited to finally find a product and company that firmly held the view of working in partnership with us to find the best fit and way to utilize the capabilities within their product. We were used to trying to fit in some other 'off the shelf' products that never did everything we needed and wanted. With Ideal-Logic we got a great team of people to partner with and who really worked to understand our wants and needs. They took the time to understand our needs and to build a system that greatly improved and streamlined our many processes.

Over the past 3 years we have consistently been impressed with the Ideal-Logic team and how dedicated they are to us and the success of our business. There have been virtually no down time issues with the system and the entire team at Ideal-Logic is available and willing to help at any time. Whenever we have questions and/or issues they are responsive and are quick to find a solution. They have worked diligently with us to build on the system and create new and innovative ideas to help solve our day-to-day system based challenges.

Ideal-Logic has changed the way we are able to do business."

## Participant Registration System

# Credit Card Processing

Ideal-Logic maintains full PCI DSS v3.2 compliance via SAQ-D. This is required by most of our university clients in order to participate in credit card processing.

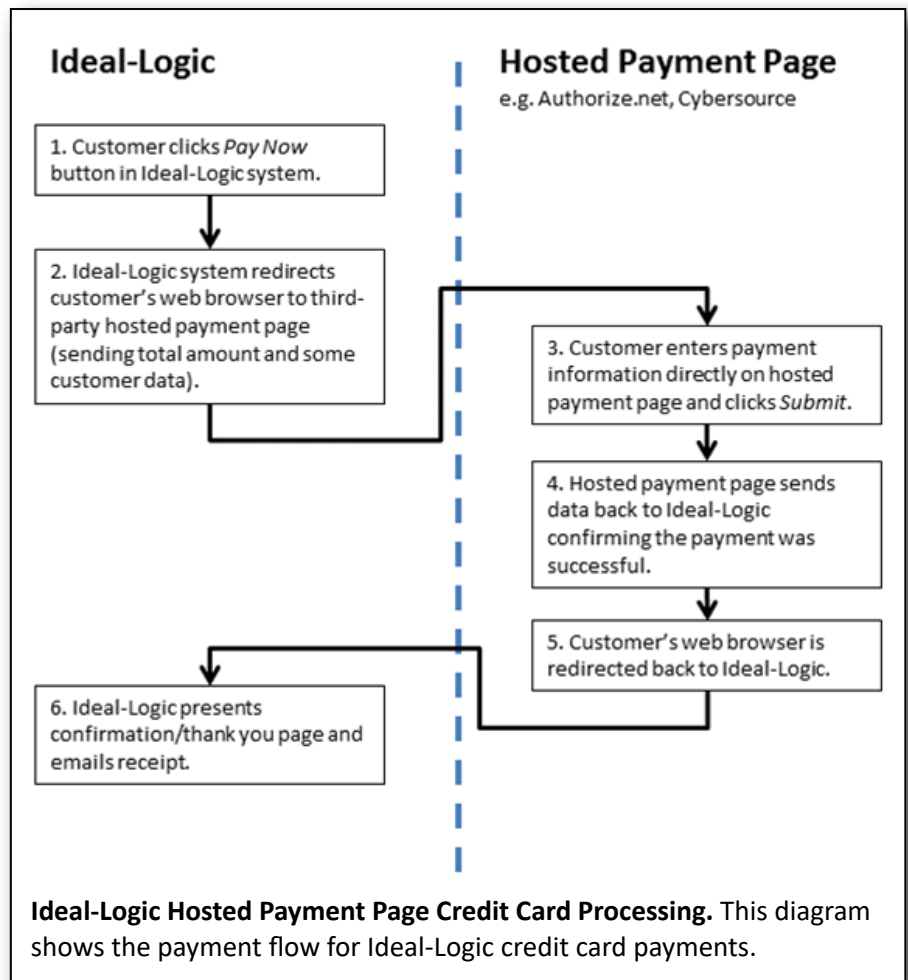
**Hosted Credit Card Processing.** Ideal-Logic's systems do not perform credit card processing, and Ideal-Logic never stores credit card data. In order to make credit card payments possible, Ideal-Logic integrates with third-party hosted payment pages. In this approach, all cardholder data is transmitted and handled directly by a third-party payment gateway. The diagram at right shows how credit card payments work in our system.

**Credit Card Processor Integration.** Ideal-Logic is fully integrated with the following credit card processors: TouchNet, PayPal, Authorize.net, CyberSource, and WorldPay. Most credit card processors are generally easy to connect with.

**Complex Configurations.** Ideal-Logic has worked with universities in complex payment configurations, and we have handled many variations of collecting payments and routing them to multiple accounting indexes and entities on campus. Ideal-Logic accounting facilities are well-developed and built into its platform.

**PCI DSS Compliance.** Ideal-Logic does not store, transmit, or process cardholder data. As a service provider in the cardholder ecosystem, we participate fully in the Payment Card Industry Security Standards Council's compliance program (PCI DSS). We document PCI DSS v3.2 Service Provider compliance via the PCI DSS Self-Assessment Questionnaire D (SAQ-D). An Attestation of Compliance (AOC) and other documentation is available upon request.

**Client Expectations.** Ideal-Logic's position is a bit unique in that it does not hold contracts directly with the third-party hosted payment page providers (e.g. Authorize.net, Cybersource, TouchNet). These contracts are held between Ideal-Logic's clients (the merchants) and the third parties (hosted payment pages). Ideal-Logic is an intermediary, providing the connections between the two. Ideal-Logic expects its clients using payment processing services and any third-party hosted payment page providers to maintain PCI DSS compliance at all times.



## Participant Registration System

# Payments

Ideal-Logic collects credit card payments via hosted payment pages provided by the client’s credit card merchant account. See the previous page (Credit Card Processing) for a description and diagram of how this works.

- **Pass Through Payments.** Ideal-Logic does not collect credit card data. Payments are passed through to the credit card merchant account, which collects the credit card number, makes the payment, and then redirects the user back to Ideal-Logic for a thank you and confirmation page. See the previous page for details.
- **Accounting System.** Ideal-Logic’s platform includes a complex accounting system that has grown over many years to support a complex array of payment options, pricing models, discount options, and tracking capabilities.

## Payment Methods

Ideal-Logic can collect and track payments of many different methods in an integrated accounting system.

- **Cash.** Staff member at a desk records a payment. Cash drawer reconciled separately (not in Ideal-Logic).
- **Check/Mail-In.** System provides customized instructions to payee for where to send the check and what to write in the memo line. Staff member records the payment in Ideal-Logic.
- **Credit/Debit Card Online.** Payee clicks a “Pay Now” button in the system and pays via credit or debit card online.
- **Credit/Debit Card In-Person.** Staff member swipes a credit card via a credit card terminal (not Ideal-Logic) and then records the payment in Ideal-Logic.

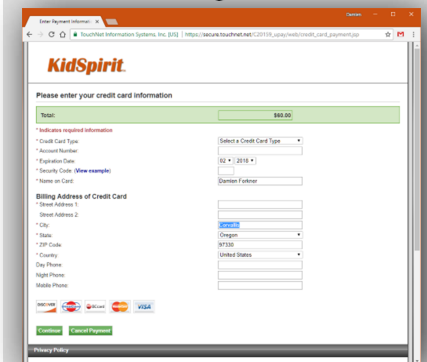
## Additional Details

- **Credit Card Processor Limitations.** It is not possible to split a single credit card payment across multiple credit card merchant accounts. Ideal-Logic processes and registration forms are set up to handle this limitation.
- **Refunds.** Ideal-Logic’s system can pay refunds when connected to a TouchNet T-Link credit card processor. Otherwise, refunds must be paid outside the system (usually via the credit card merchant account interface) and then recorded in Ideal-Logic.
- **Accounting Entities.** Ideal-Logic’s accounting infrastructure provides an abstraction layer to track payments to multiple groups and allow for independent reporting/tracking of each group’s payments.
- **Reporting.** Integrated reporting based on payments is very robust and well-developed. Many of our clients have been using our system for many years to report on payment information.



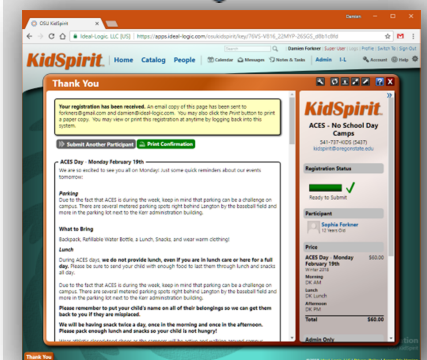
**Payment Page (Ideal-Logic).**

Participant has completed registration form, selects credit payment, and clicks green Pay Now button.



**Credit Card Page (TouchNet).**

Payee enters credit card number in TouchNet.



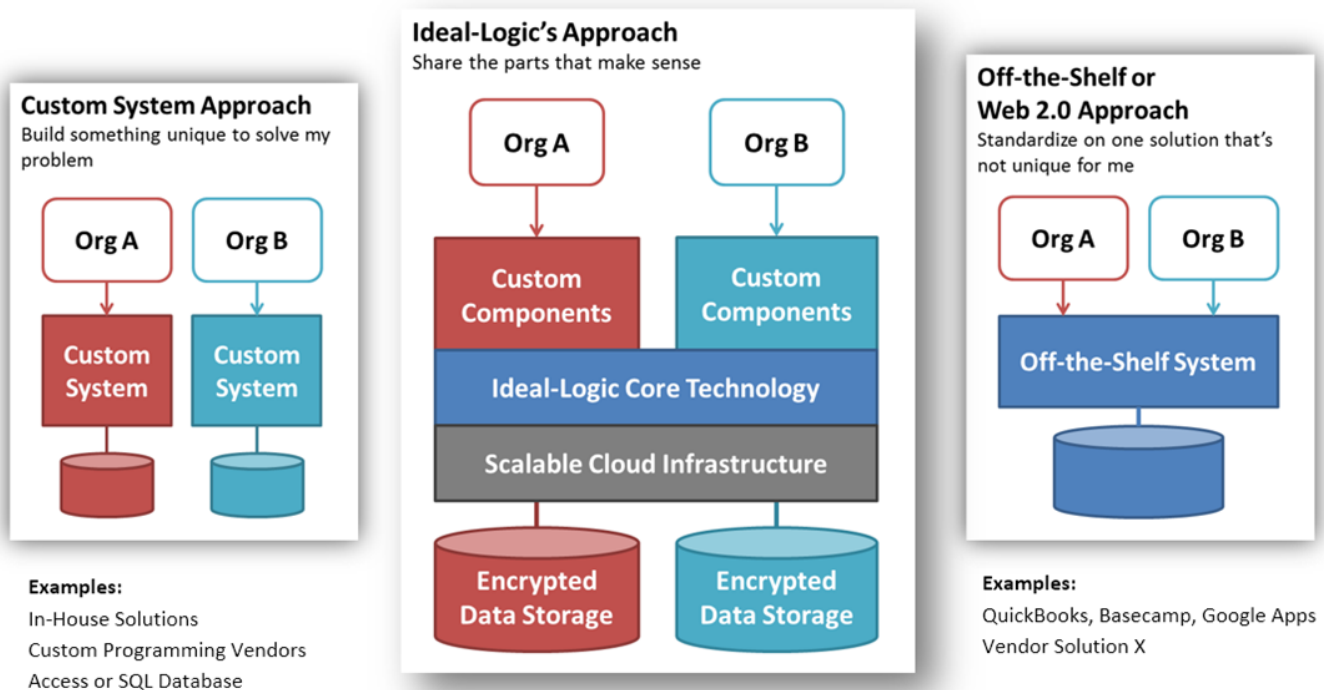
**Thank You Page (Ideal-Logic).**

Payee receives confirmation details and instructions. Email copy also sent when payment succeeds.

# Ideal-Logic's Approach

Our technology and our company are designed from the ground up to solve complex data management and workflow problems. Ideal-Logic's unique approach provides a full custom solution with none of the headaches and a much lower cost.

Ideal-Logic custom applications are provided as a web-based service. No infrastructure, hosting, or I.T. support is required – only a web browser and internet connection. Security, data backup, and a reliable, redundant infrastructure are all provided as part of the service. Intuitive design, a fast and responsive user interface, and the ability to handle almost any level of complexity make Ideal-Logic applications truly useful to our clients.



	Custom System Approach	Ideal-Logic's Approach	Off-the-Shelf or Web 2.0 Approach
<b>Good fit/good solution</b>	Yes, if well designed	<b>Guaranteed</b> as part of the purchase price	Rarely the best fit
<b>Reliability/bug rate</b>	Generally poor due to low testing	<b>Good</b> because most components are well tested	Good if you choose a good vendor with lots of users
<b>Flexibility to change</b>	Good if you have the original programmer(s)	<b>Excellent</b> and included in the price	Not likely
<b>Development costs</b>	Extremely high	<b>Low</b> (only implement the custom parts)	Very Low (spread over lots of customers)
<b>Maintenance costs</b>	High	<b>Fixed</b>	Low except upgrades
<b>Infrastructure costs</b>	High – servers, system admins, and I.T.	<b>None</b>	Varies
<b>Support costs</b>	Low if well-designed	<b>Low</b> and decreasing with ongoing improvements	Varies depending on quality and fit for the problem

Approach: Ideal-Logic's Approach

# Platform Overview

Ideal-Logic custom applications are provided as a web-based service. No infrastructure, hosting, or I.T. support is required – only a web browser and internet connection. Security, data backup, and a reliable, redundant infrastructure are all provided as part of the service. Intuitive design, a fast and responsive user interface, and the ability to handle almost any level of complexity make Ideal-Logic applications truly useful to our clients.

**Our software platform works for you.** *Complex, everyday work software that doesn't slow you down.* We've built our entire company and invested considerable resources and talent to develop the Ideal-Logic platform that is behind all of our applications. This unique technology allows us to build applications very, very quickly and with a very low error rate. Our platform allow us to grow, change, support, and evolve custom applications as efficiently and affordably as humanly possible.

**I.T. involvement is optional.** *Help, support, changes, and new features are only a phone call away.* If your experience is anything like ours, your I.T. department is probably overwhelmed. There just aren't enough resources to go around to meet the need for good software solutions. Nearly all of our client organizations work with us directly, without the need for any I.T. intermediary or resources (most with their I.T. department's blessing, of course). We handle security, backup, servers, and provide everything required for a complete solution. All you need is a web browser.

## Specifications

- Fully hosted solution. Server farm co-located at PEAK Internet in Corvallis, Oregon.
- Platform fully owned by Ideal-Logic.
- Unique web interface only updates what's changed on a page.
- Fully-functional windowing interface designed to get real-world work done.
- Redundant firewalls, servers, networking, and databases.
- Multiple power and network providers, battery backups, generators.
- Real-time offsite backups.
- Encryption of all data any time it touches a disk or network wire.
- Fully memory-resident database executing >20K queries per click.
- Technologies: C, Perl, Javascript, AJAX, HTML5, Ubuntu Server.

## System Uptime

Our system is designed to be completely redundant and resilient, and our goal is 100% uptime. We never have scheduled downtimes.

Year	Uptime
2009	99.971%
2010	99.827%
2011	99.899%
2012	99.969%
2013	99.860%
2014	99.926%
2015	99.960%
2016	99.926%
2017	99.988%
2018	99.973%
2019	99.961%
2020	99.979%
2021	99.850%
2022	99.954%

## Approach, Methodology, and Technology

# Hosted Service

Ideal-Logic hosts its own system on its own servers.

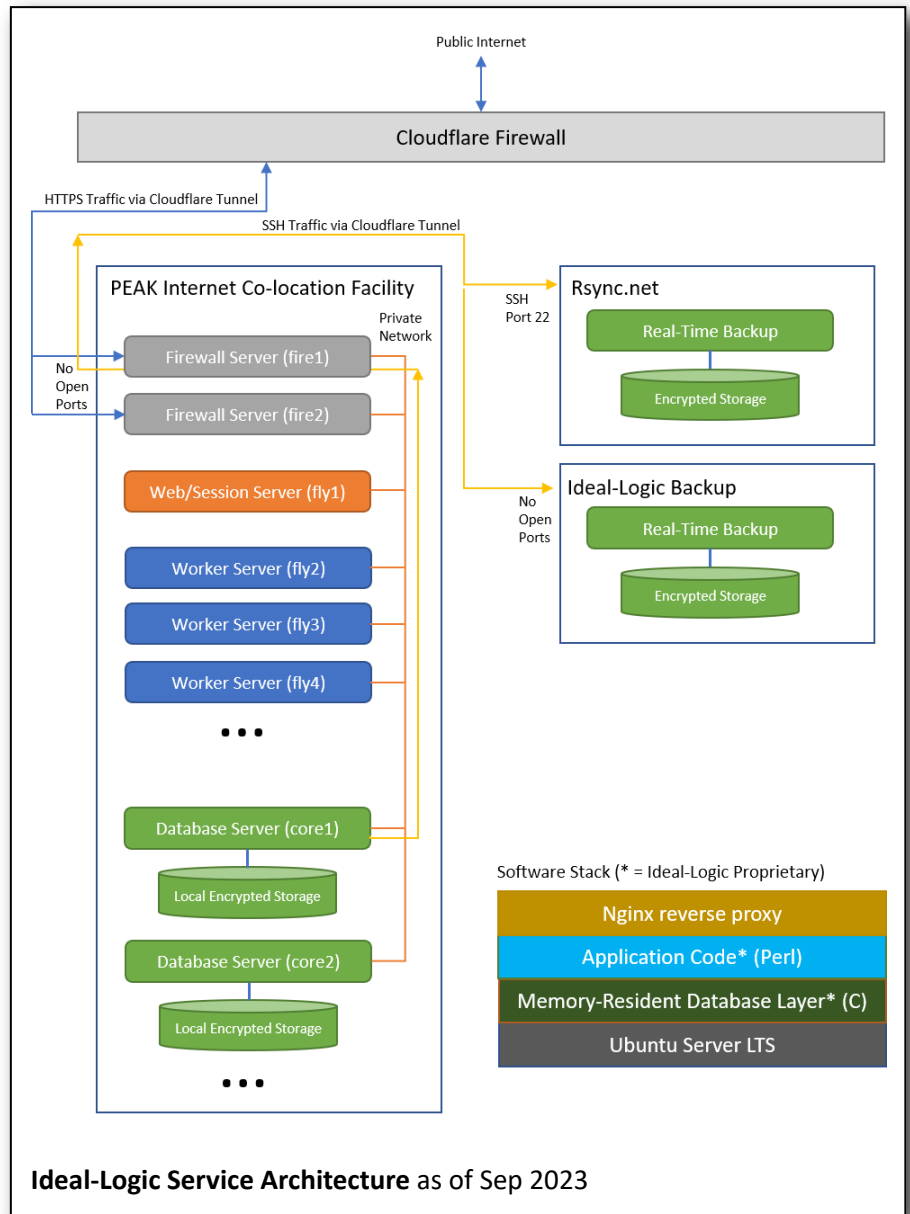
**Ideal-Logic Server Farm.** Our servers are co-located at PEAK Internet in Corvallis, Oregon. PEAK provides 24x7 physical security, redundant power and cooling systems, and multiple peered connections to Internet backbone providers.

**Server Security.** Ideal-Logic uses a hardened Ubuntu Server operating system for its servers. Ideal-Logic processes maintain these servers with current security patches and code updates. Our servers are protected by multiple redundant firewalls, and each server also functions as its own firewall. Industry-standard techniques to secure, patch, and maintain these servers are followed at all times.

**Cloudflare.** Ideal-Logic uses Cloudflare to protect all of its applications and servers. Our servers have no open ports on the Internet. This unique configuration protects our data in ways that were not even imaginable a few years ago.

**Encryption.** Data is encrypted as it is entered into the system, and it is always encrypted whenever it touches a network or a disk for storage.

**Offsite Backups.** Encrypted backup data is sent in real-time to two geographically diverse locations.



# Approach, Methodology, and Technology Platform Features

Ideal-Logic's proprietary software platform provides the foundation for all of our development. It is designed from the ground up to support our rapid development and deployment model. It provides:

**A Flexible In-Memory Database.** This unique piece of software provides the foundation of our platform and is capable of processing the >20K queries per click required to support our complex applications.

**Advanced Data Modeling.** Our platform is designed to allow us to model the real-world solutions our clients need in a way that makes sense to people.

**Access Control.** Every page that every user sees in our system is custom-drawn for that user. This fine-grained access control is built into the platform.

**User Interfaces.** Ideal-Logic uses a standard suite of user interfaces that are continuously being improved and evolved in response to usage and feedback. A consistent, intuitive user interface is a key part of our service.

**Windowing System.** Ideal-Logic's platform provides a fully-functional windowing system that makes it possible for administrators to open multiple lists or data items simultaneously, lay them out next to each other, and quickly switch back and forth between tasks. This critical feature makes it possible to use the system for real work every day *much more efficiently* than a standard web-based system.

**Scalability.** Our platform allows us to grow an application in many directions—scaling up to more users, more layers or groups of users, adding new features and functionality, expanding simple processes into more complex ones, interact with external systems. In other words, it allows us to grow in all of the ways we need to grow to solve complex, real-world problems.

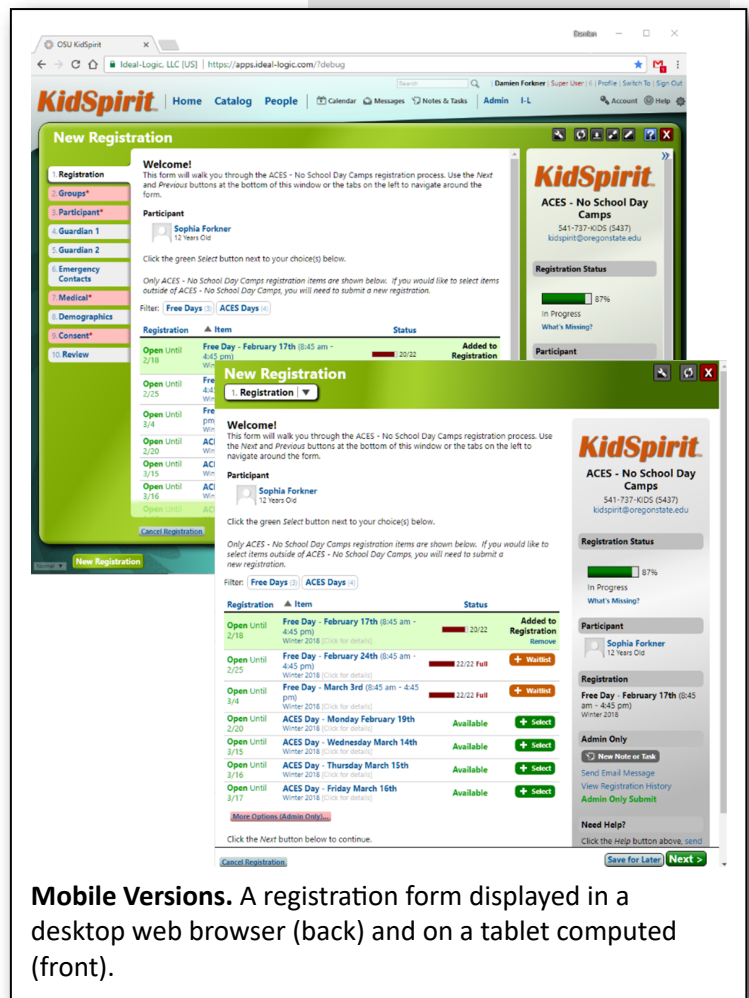
**Web Browser Support.** Ideal-Logic's system is accessible to any modern web browser. See a specific list at right of versions supported.

**Mobile Device Support.** Our system automatically scales to a touchscreen- and mobile-friendly interface appropriate to the device. In the case of a tablet or phone, the system converts the viewpoint into a "one-page-at-a-time" model by default that maximizes screen space and touchscreen usability.

## Browser Support

Ideal-Logic's system is accessible via any modern web browser, desktop or mobile. Here are some specifics:

- Google Chrome (version 21+)
- Apple Safari (version 7+)
- Mobile Safari (version 7+)
- Mozilla Firefox (version 27+)
- Microsoft Edge (all versions)
- Internet Explorer (version 11+)
- Opera (version 12.18+)
- Android (version 4+)



**Mobile Versions.** A registration form displayed in a desktop web browser (back) and on a tablet computed (front).



# Redundancy and Availability



## System Uptime

Our system is designed to be completely redundant and resilient, and our goal is 100% uptime. We never have scheduled downtimes.

### Year Uptime

2009	99.971%
2010	99.827%
2011	99.899%
2012	99.969%
2013	99.860%
2014	99.926%
2015	99.960%
2016	99.926%
2017	99.988%
2018	99.973%
2019	99.961%
2020	99.979%
2021	99.850%
2022	99.954%

Ideal-Logic’s hardware and software platform is fully redundant at every level. It was designed from the group up to require no scheduled downtimes or maintenance outages. A great example of this occurred in 2013, when we spent a week moving our entire production system to a new hosting provider with zero downtime.

**Maintenance Outages.** Ideal-Logic’s system never has any planned downtimes or maintenance outages. It is designed to avoid these entirely.

**Unexpected Downtime.** When unexpected downtime has occurred in the past (usually a result of Internet issues, power loss and generator failure, or human error):

- Ideal-Logic staff are immediately notified by automated text message and emails sent by multiple “canaries” that are watching our service at all times.
- Our priority is always to restore the service as quickly as possible.
- We maintain a Twitter account to provide out-of-band communication of any downtime more than a few minutes in duration.
- We notify affected clients via phone or email as soon as service is restored.
- If requested, we can provide forensic analysis of any outage to clients.

**Service Level Agreement.** Ideal-Logic does not provide service level agreements (SLAs) by default, but they can be negotiated if desired. Please see our uptime history at right.

**Corporate Commitment.** Ideal-Logic’s business depends on system uptime and availability. We constantly strive to improve in this area and reach our goal of 100% uptime.

**Backup Frequency and Data Loss.** Ideal-Logic has never lost any data. Ideal-Logic has multiple offsite servers providing real-time backups of database transactions within seconds of their occurrence. Even in the event of a disaster that destroyed our server farm, we would not expect to lose any data. In case this real-time mechanism fails for any reason, we use an independent mechanism to run nightly incremental backups of our database. Backups are monitored daily and tested several times per year.

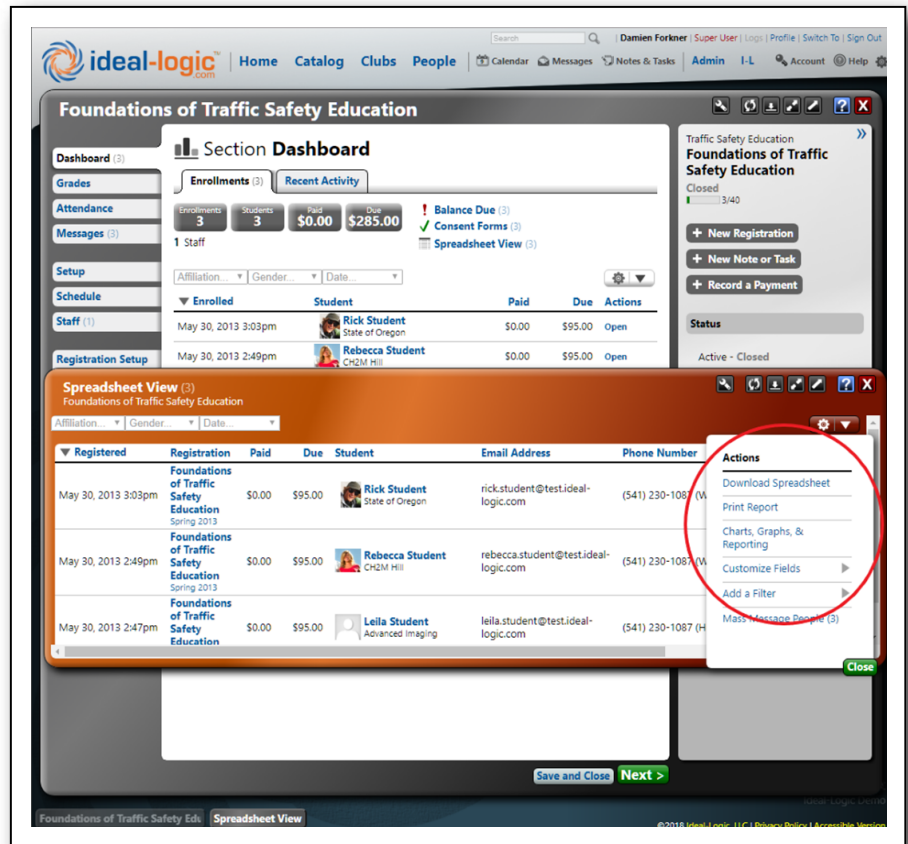
**Ransomware Protection.** We use ZFS to create immutable snapshots of backup data that cannot be overwritten or encrypted in a ransomware attack. In addition to all of the other protective measures, this provides peace of mind for our data.

**Disaster Recovery.** Ideal-Logic maintains disaster recovery plans for several worst-case scenarios. In the worst case, we expect to have the service back up and running within 24 hours from real-time offsite backups using cloud servers. We maintain Amazon AWS servers for this purpose that are ready to take over in a disaster.

# Data Access and APIs

All data entered into Ideal-Logic's system is owned by the client. We consider good data access to be critical to providing a good solution to real-world problems. Additionally, our experience has taught us that integration with other systems is difficult. Here is how we approach this problem:

- **Spreadsheet Download.** Any data table in the system can be customized with additional columns, filtered, sorted, and downloaded as a CSV file (opens in Excel) with a single click.
- **Custom Reports.** Any customized data table can be stored as a custom report, named, and shared with other users.
- **Reporting Spreadsheets.** Ideal-Logic provides large spreadsheet views of many data items in the system that are accessible to higher-level administrators. These spreadsheets are pre-built to include many common data fields and also include custom data fields created by users.
- **Batch File Downloads.** Many places in the system provide batch file download options that produce ZIP files of uploaded file attachments, images, profile photos, etc.
- **Batch Printed Documents.** Most documents in the system can be printed via batch printing mechanisms. We work with our clients to design paper outputs for archival and retention purposes (e.g. signed consent forms).
- **API Access.** Ideal-Logic's industry-standard REST API provides access to many data fields by any programmer (access controlled and encrypted, of course). As part of our custom service, we can easily configure additional REST API endpoints to retrieve additional data from the system. For more details, see the "API" section later in this document. This access is included in the service price.
- **Programmer Support and Custom Integrations.** Ideal-Logic has the development resources to interact with nearly any outside system. We have configured integrations with many systems at many different universities, including Banner and Canvas, using custom integration code. These integration options are available for an additional charge.
- **XML/JSON Data Dump.** As part of our Terms of Service, we provide a "break-glass" option to request a full dump of all account data via JSON or XML. Contact us to initiate this transfer at any time.

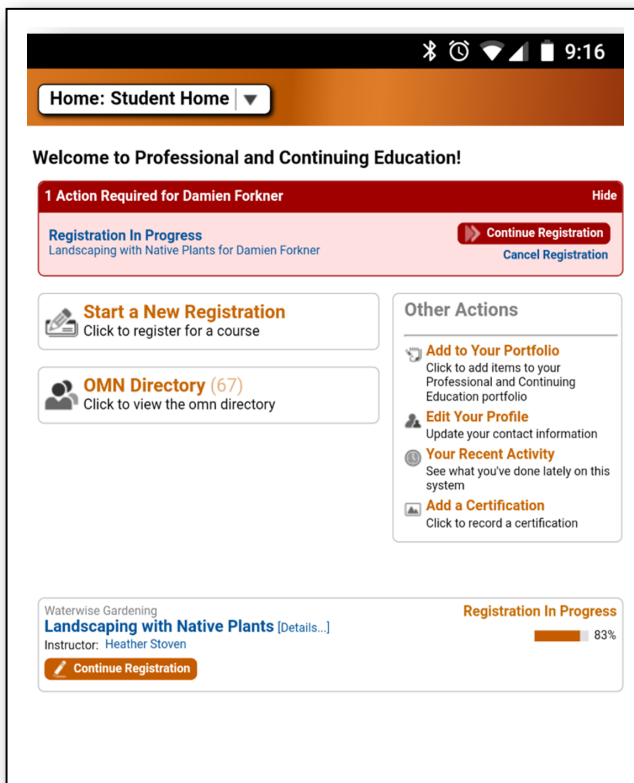


# Mobile User Interface

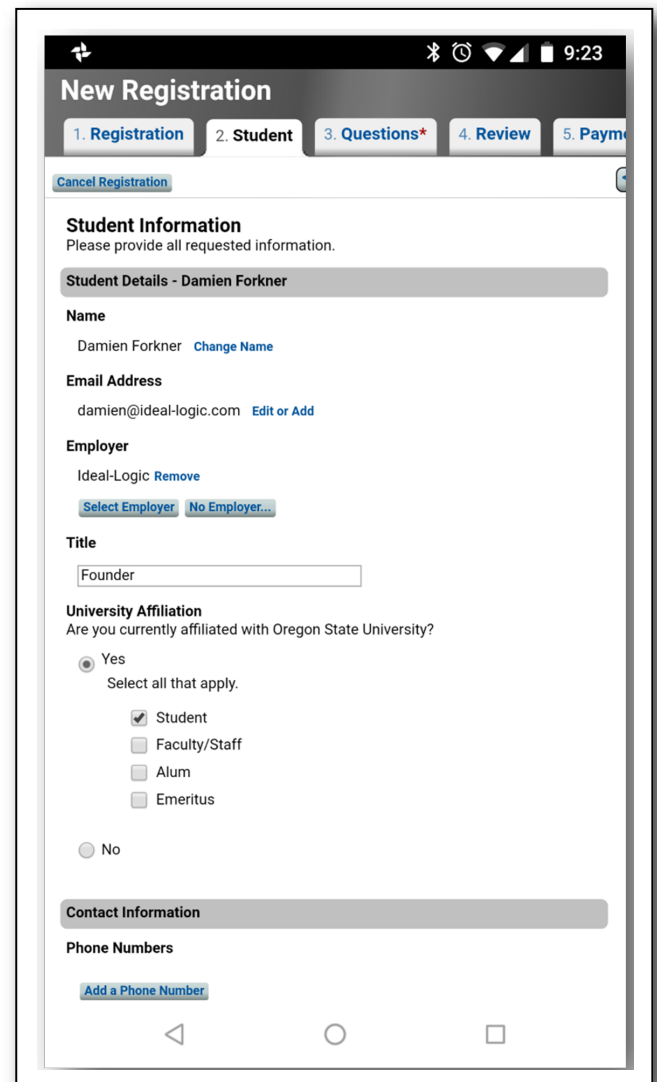
Ideal-Logic’s entire system is available for use on any modern mobile device. When it detects a mobile device, the system converts into a mobile-friendly mode with a simplified user interface.

- **Fully Functional.** Ideal-Logic’s mobile interface is 100% functionally equivalent to the desktop version. Rather than a windowing interface, the system displays one page at a time.
- **Installable Web App.** On Android and iPhone devices, the system prompts the user to install the system as an app link on the user’s Home Screen. When used in this mode, the user experience is similar to an installed native app.
- **Any Modern Device.** Any modern Android, iOS, or Windows Phone device will be able to run Ideal-Logic’s mobile web app.

Approach: Mobile User Interface



**Mobile User Interface.** Student Home Screen from OSU Professional and Continuing Education system (above) and registration form (right). Screenshots from an Android phone.

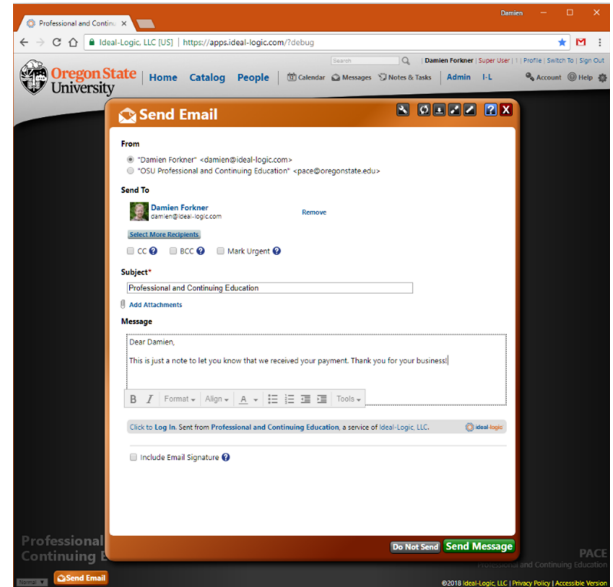


# Notifications (1/2)



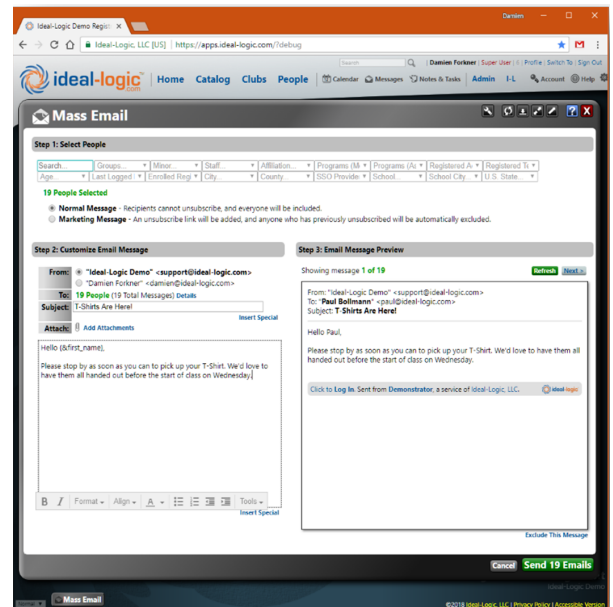
Ideal-Logic’s platform and processes support many different types of notifications. We work with our clients to implement the most appropriate type of notification for each need.

- Rich Text Email Content.** All email messages sent from the system can include rich text content and formatting. They are sent as HTML messages that are readable by any modern email client. Many automatic notifications sent from the system (e.g. a Registration Confirmation message) are richly formatted and include images. Messages can include attached files or links to attached files.
- Manual Individual Email Notifications with User Customization.** These can be triggered manually (for example, by opening a user’s profile and clicking “Send Email”) or as part of a process (for example, after clicking an “Approve” button to approve an application). The user interface allows the sender to customize the text of the message, attach files, add additional recipients or CCs, and choose to send the message or not.
- Mass Emails to Groups.** Mass emails can be sent throughout the system to selected groups of people. Mass marketing messages automatically include Unsubscribe functionality. Mass email interface includes filtering and selection of recipients, customization of the message to be sent, and previews of each individual message.
- Automated Process Notifications.** Email messages can be added to any process throughout the system or based on a schedule. In many cases, these messages have already been built and can simply be customized. In other cases, we can add notifications easily where they are required as part of our service.
- Custom Notifications.** In many places, it is simple to set up completely custom notifications that are triggered by rules (for example, 7 days before registration closes, send an email message to people who have registrations in progress).
- Digest Notifications.** For administrators, it is often preferable to receive digest notifications on a schedule (e.g. daily) rather than individual notifications. We provide a customizable mechanism to select which message types to include in the digest and configure a schedule to receive them.



## Manual Email Notification with Customization.

This version allows a customizable message to be sent to individual users.

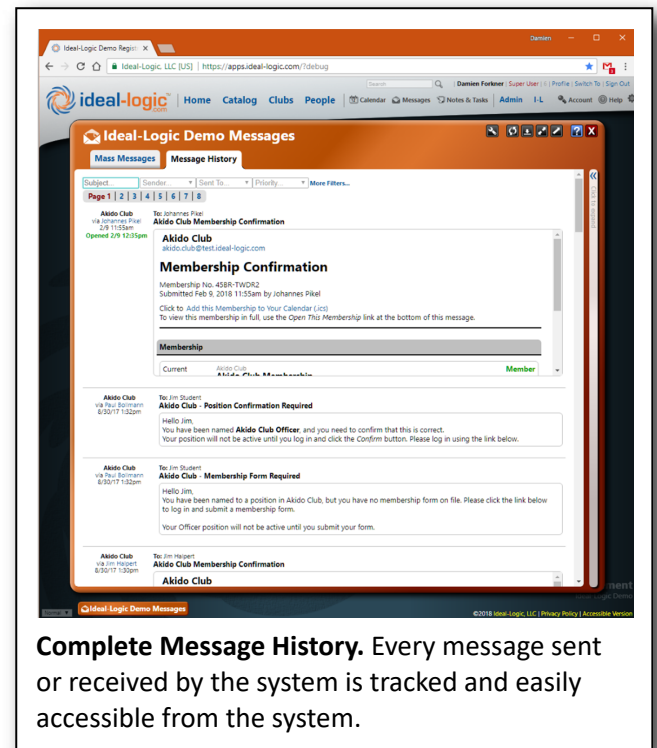


## Mass Email Notifications.

This interface allows filtering and selection of recipients, customization of the message, and previews of each individual message that will be sent.

# Notifications (2/2)

- **Individual Text Notifications.** The system can be used to send text messages in a similar fashion to the way that emails are sent. End users are required to enter their SMS messaging phone number and consent to receive text messages.
- **Group Text Notifications.** When text messaging is used, mass messages can be sent as a combination of emails and text messages for people who prefer to receive them one way or another.
- **Text Message Forwarding.** Using text messaging requires the assignment of a text messaging phone number as the sender for text messages. When people respond to these texts, the system can be configured to forward them to other text messaging phone numbers or email them to selected users.
- **Emailing Into the System/Email Forwarding.** The system can be configured to receive mail when it is appropriate to do so. This allows emails to be sent into the system, received, and automatically stored with the appropriate data item in the system. They can also be forwarded on to individuals or groups. This can be very useful for certain types of knowledge retention processes.
- **Read Message Tracking.** The system automatically adds a small tracking image to the bottom of messages sent. This allows the system to receive a notification when messages have been opened by the recipient. This is an imperfect tracking mechanism due to the limitations of email clients, but it can be helpful.
- **Message History.** A complete copy of every message sent or received by the system is automatically tracked and stored in the system. This message history is available throughout the system. For instance, you can open a person's profile and go to the Messages tab to see every message they have received, or you can open a registration and go to the Messages tab to see all notifications for that registration.
- **Messaging Security and Anti-Spam Technologies.** Ideal-Logic uses SPF, DKIM, and DMARC to send messages that are compliant with industry standards and prevent them from being discarded by spam filters. We have a good track record and high success in this area.
- **Outlook/Office 365 Compatibility.** All messages sent by the system are compatible with Outlook/Office 365. Integrated action links allow actions to be executed directly from emails using any email client.



**Complete Message History.** Every message sent or received by the system is tracked and easily accessible from the system.

# Branding

Ideal-Logic's system provides a flexible system of branding so that the system looks and feels as close to our clients' brands as possible.

- **Hierarchical Configuration.** Branding is defined at a high level for each entity we work with. This includes a logo and color scheme. It can be customized within a specific account and then further customized for individual departments and programs within an account. Most configuration related to branding (colors, logos, support phone numbers, email contacts) can be customized at all of these levels by administrators with appropriate permissions.
- **Special Considerations.** Within the technical limitations of our system, we are happy to work with our clients to further refine branding as part of our service. For the University of Oregon, for example, we built a custom header bar at the top of the system that includes standard UO links so the system fits more tightly into UO branding guidelines.



**Branding Examples.** System branding configurations for Stanford Recreation (back), University of Oregon Purchasing and Contracting Services (middle), and Oregon State Faculty Staff Fitness (front).

# Printing

Ideal-Logic's custom service includes the ability to print paper documents from the system as needed. Many paper documents are already built and ready to print from the system as needed.

**Paper Printing.** Clicking a Print button in the Ideal-Logic system opens a new tab in the web browser containing a paper-printable document.

**PDF Conversion.** A PDF option is usually also available to automatically convert the document to PDF format.

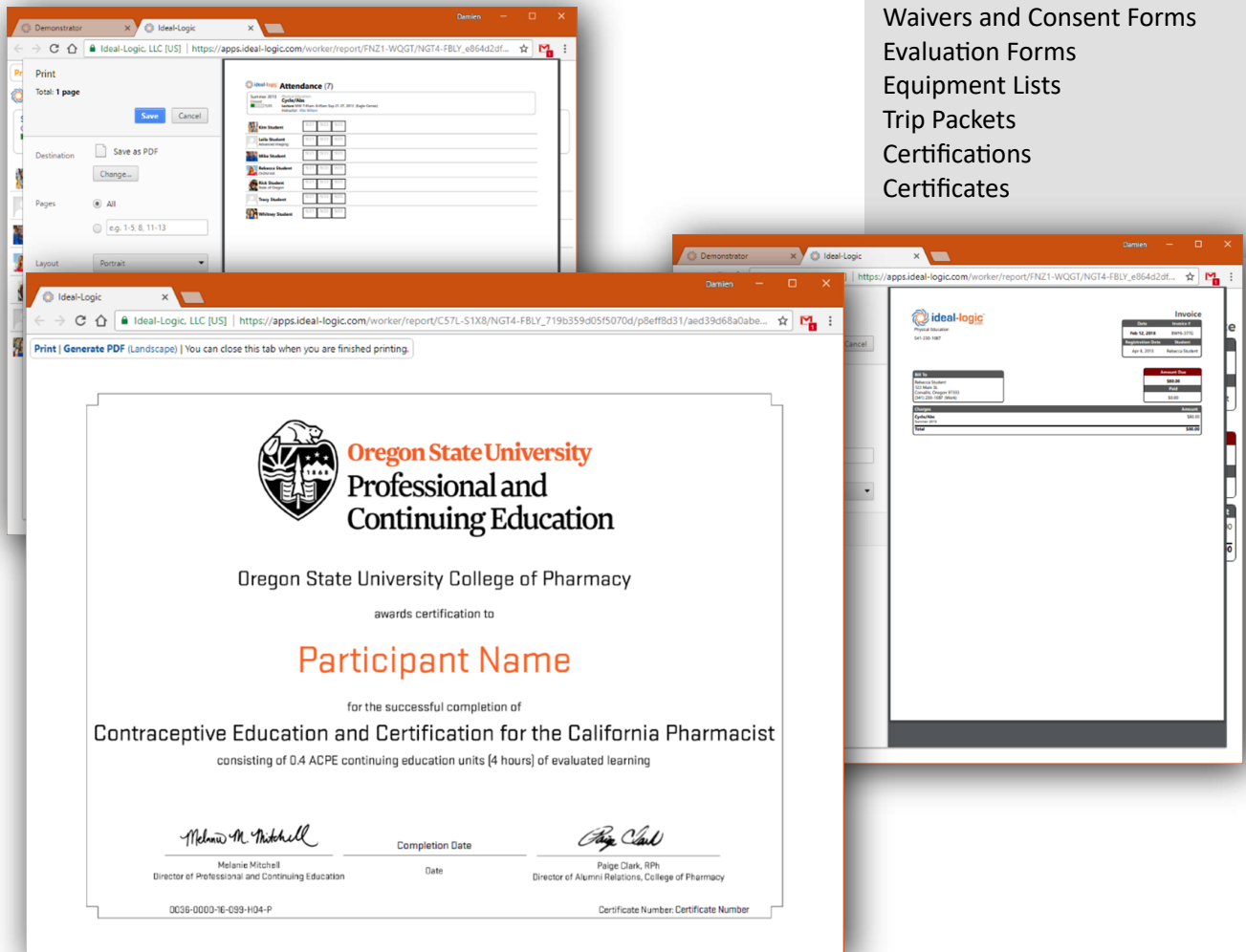
**Batch Printing.** When appropriate, we provide batch printing functions to allow an administrator to print a group of documents together (for example, all registration forms for a given course).

**HTML Printing Limitations.** Printing from a web browser is not always consistent across browsers and platforms. We design printed pages to fit compactly and place page breaks logically, but it is not always possible to get the same level of precision from web browser printing as you can with a word processor.

## Paper Document Examples

This is a partial list of paper documents that the system currently prints as part of its processes.

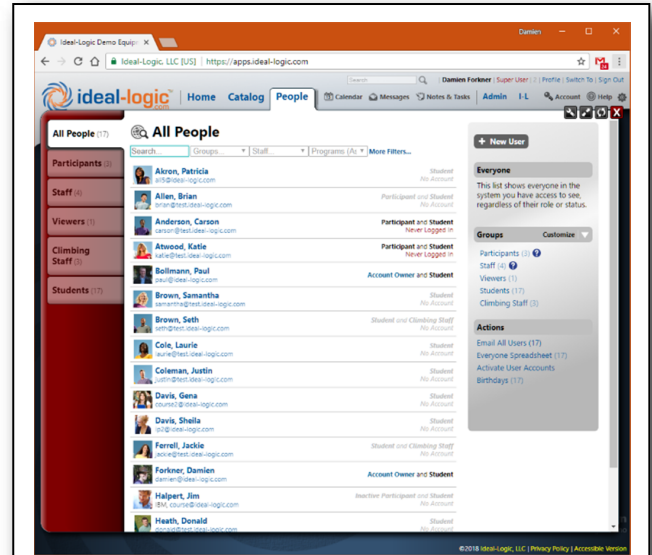
- Registration Confirmations
- Invoices
- Payment Receipts
- Registration Forms
- Name Tags (various sizes)
- Rosters
- Attendance Sheets
- Schedules
- Staff Schedules
- Special Concerns Lists (medical)
- Emergency Sheets
- Balance Due Lists
- Sign-In Sheets
- Waivers and Consent Forms
- Evaluation Forms
- Equipment Lists
- Trip Packets
- Certifications
- Certificates



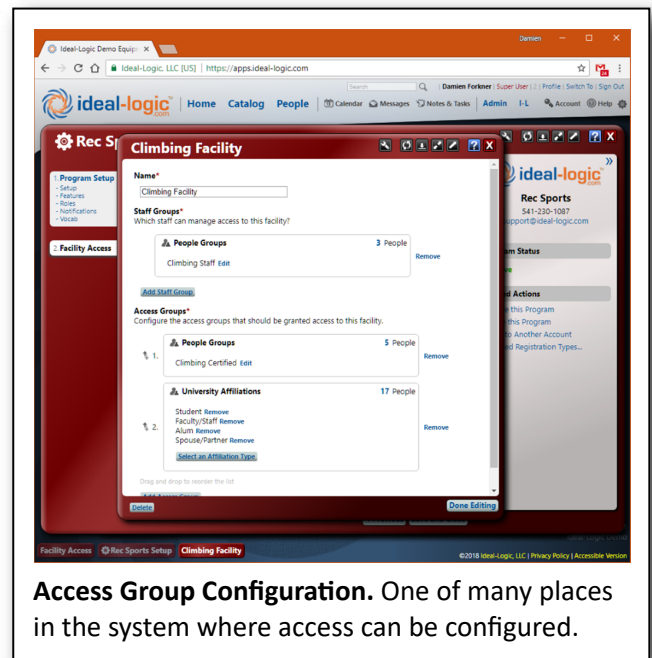
# Access Levels

Ideal-Logic's platform and applications are designed specifically to handle the complex access control required in order to properly model the needs of large, real-world organizations.

- **Data-Based Access.** Many levels of access in the system are granted automatically based on a person being associated with a particular data item. For example, the person named as an instructor for a course will automatically become a member of the Staff access group and gain access to view that course's list of enrollments, attendance sheets, rosters, etc.
- **Group-Based Access.** Some global access levels in the system are granted manually by an administrator. For example, the Student Leadership and Involvement organization at OSU grants access to a handful of Campus Security staff who log in to the system to view some specific student organization data. These people are explicitly named by administrators.
- **Custom Access Groups.** We believe the best way to simplify access control is to use the right language. This is why we have built a complete customization layer for naming related to access levels. We always use our client's exact terminology to describe access roles (for example, KidSpirit names "Counselors" and "Head Instructors" that have the right level of access automatically).
- **Hierarchical Structure.** Administrative access in general in the system is organized hierarchically. For example, administrators may be named at the top level and have access to administrative functions across the system. Administrators may also be named for a particular department and will gain access to that department and its sub-units. Instructors and trainers gain access to their courses and students.
- **Flexibility.** As part of our custom service, any access level may be tweaked, customized, or modified. Our goal is always that the service we provide fit your process, not the other way around.
- **No Limitations.** There are no limitations to the number of administrators or users at any level in the system.



**People Menu.** Shows user accounts in the system and the various access levels associated with each person.



**Access Group Configuration.** One of many places in the system where access can be configured.



# Approach, Methodology, and Technology

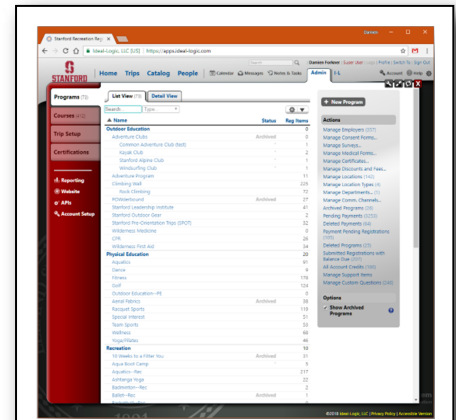
## Program Hierarchy



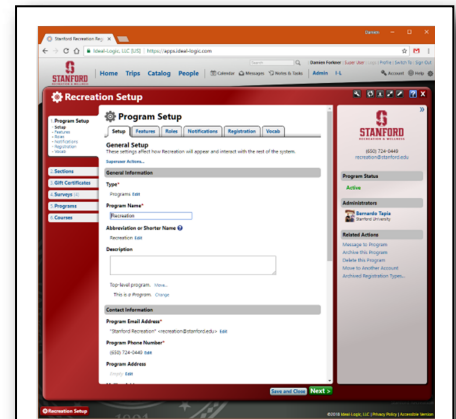
The ability for each administrative unit to have its own “space” in the system is one of Ideal-Logic’s greatest strengths. We provide a hierarchical configuration of program, department, and administrative units. This hierarchy provides many benefits:

- **Branding.** Each program can have its own branding. Logos, colors, phone numbers, support email addresses, help contacts, and many other settings can be customized for that department’s use.
- **Form and Process Customization.** Programs can set up defaults for various forms and processes that are unique to that program. Each program can have its own registration questions, discounts, review processes, and many other functions.
- **Administrative Access.** Administrative staff can be named with each program and only gain access to that program’s data. This significantly reduces the risk of many kinds of errors and problems (either accidental or intentional).
- **Dashboards.** Each program has its own administrative dashboard automatically built based on the features, processes, and tools the program is using.
- **Participant Tracking.** Individual participants may interact with one or more individual programs within the same system. Ideal-Logic’s system allows this participation to be tracked independently for each program and also aggregated across the entire system. As participants become associated with more programs, they may gain more access or have new features appear on their Participant Home screen.
- **Reporting.** Reports can be created easily across the entire system or for specific programs or groups of programs.

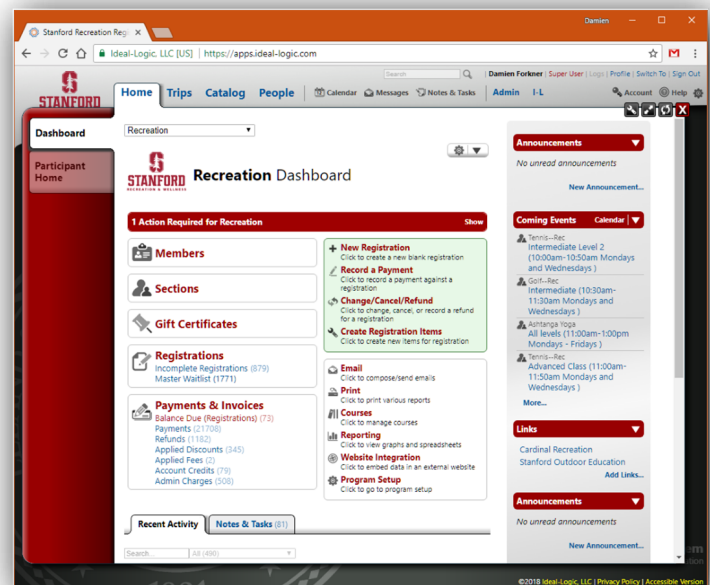
**Program Dashboard (right).** Provides a custom administrative viewpoint for administrators in each program.



**Hierarchy of Departments.** Configure a separate space for each group.



**Program Setup.** Configure and customize per-program.



# Online Consent and Digital Signatures

Many Ideal-Logic processes involve collecting consent or signatures for online waiver forms. This document details our approach to this problem.

## Overview

1. **Authentication.** This means establishing that a uniquely identified individual is present. The stronger the authentication scheme, the stronger the confidence that the right individual is indicating consent.
2. **Affirmation.** This means establishing that the authenticated user took action that required intent. In this case, we want to be sure that the user intended to agree to your waiver. The system must provide sufficient logging and record of specific user actions to provide a complete audit trail.

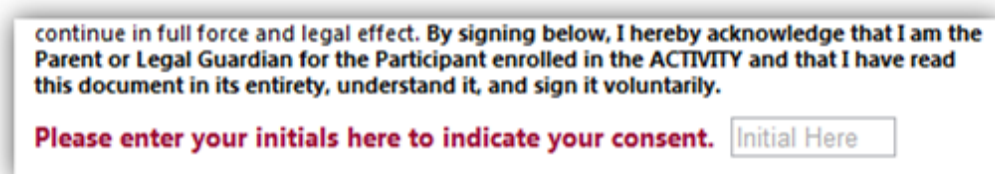
## Authentication Techniques

Ideal-Logic systems are generally accessed by users using an email address as a unique identifier and a password known only to that user. Passwords are internally protected using secure hashing algorithms, encryption, and timeouts. Ideal-Logic's password selection screen shows users a visual representation of the strength of their password, to encourage users to select strong passwords.

Ideal-Logic provides custom support for stronger authentication measures, including custom password strength rules, timeouts, and security questions for password resets. For maximum security, Ideal-Logic can support two-factor authentication using key files or other secure techniques. Most of our clients using online waivers choose to at least implement security questions for additional security.

## Affirmation Techniques

A typical online waiver in an Ideal-Logic system asks the user to review the text of the waiver and then enter their initials to indicate their consent. This approach ensures that the user intended to agree with the text provided in the statement.

A screenshot of a digital consent form. The text reads: "continue in full force and legal effect. By signing below, I hereby acknowledge that I am the Parent or Legal Guardian for the Participant enrolled in the ACTIVITY and that I have read this document in its entirety, understand it, and sign it voluntarily." Below this text is a red instruction: "Please enter your initials here to indicate your consent." followed by a text input field containing the placeholder text "Initial Here".

continue in full force and legal effect. By signing below, I hereby acknowledge that I am the Parent or Legal Guardian for the Participant enrolled in the ACTIVITY and that I have read this document in its entirety, understand it, and sign it voluntarily.

Please enter your initials here to indicate your consent.

The Ideal-Logic system automatically tracks a complete history of every action performed by every user. System logs also track system access, password resets, and other relevant details. Logs and histories are encrypted, stored securely within our database, and are not available for tampering. Using these mechanisms, the Ideal-Logic system provides a secure, complete audit trail sufficient to establish affirmation.

Approach, Methodology, and Technology

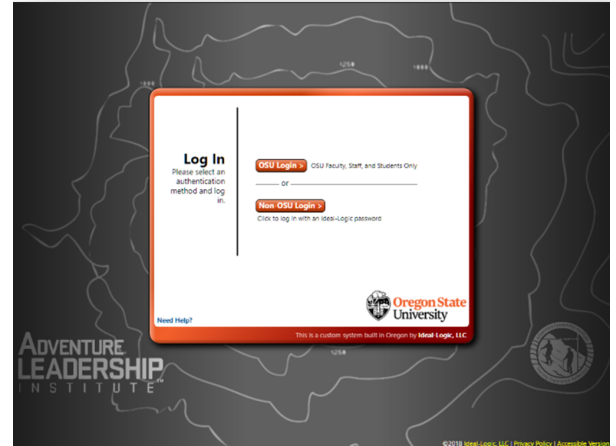
# Single Sign-On

Ideal-Logic authentication processes can be integrated with most single sign-on (SSO) environments of the following types:

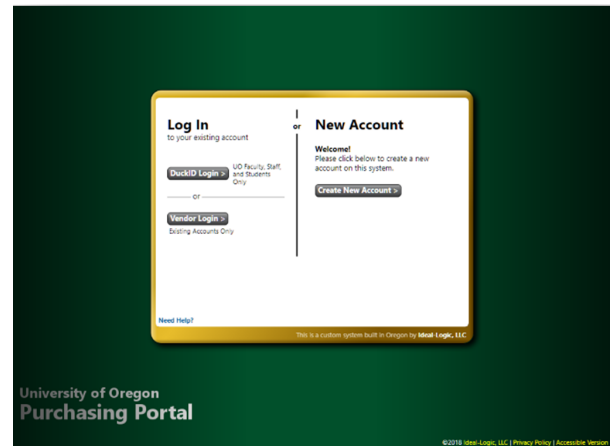
- **Security Assertion Markup Language (SAML/Shibboleth).** Ideal-Logic systems can integrate quickly and easily with a SAML environment. Contact and assistance of your IT department will be required in order to enable the connection.
- **Central Authentication Service (CAS).** Integration with a CAS environment is straightforward. Contact and assistance of your IT department will be required in order to enable the connection.
- **Microsoft Active Directory (AD).** Ideal-Logic can integrate with SSO provided by Microsoft's ActiveDirectory server by configuring the ActiveDirectory server to allow SAML authentication. Contact and assistance of your IT department will be required in order to enable the connection.
- **Social Networking Providers (Google, Facebook, Yahoo!, Twitter, etc.).** Ideal-Logic has experience integrating with these systems for login using a third-party product called Gateway from Cirrus Identity. Please speak to us to discuss this option further. Extra charges will apply.

Ideal-Logic's authentication mechanisms also include the following features:

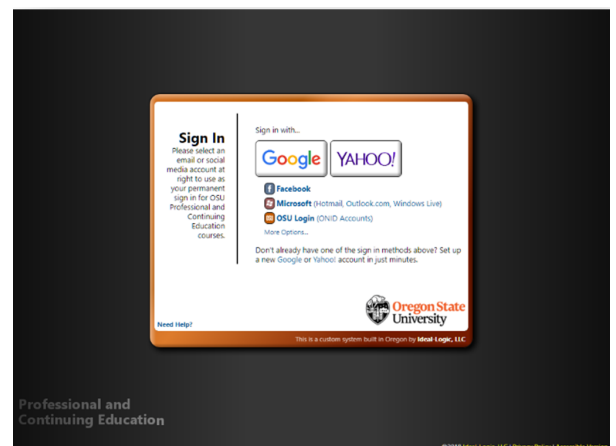
- **Mixed Authentication.** Systems can be configured to support SSO authentication for those users who can use it (e.g. faculty/staff) and seamlessly also support Ideal-Logic password-based logins for people who cannot use the SSO login (e.g. community members).
- **Complex Scenarios.** As a custom service, we can work with you to arrange the right login mix for your user base.



**SAML + Ideal-Logic.** Oregon State University Adventure Leadership Institute.



**SAML + Ideal-Logic with New Account.** University of Oregon Purchasing and Contracting Services.



**Social Networking Login.** Oregon State University Professional and Continuing Education.

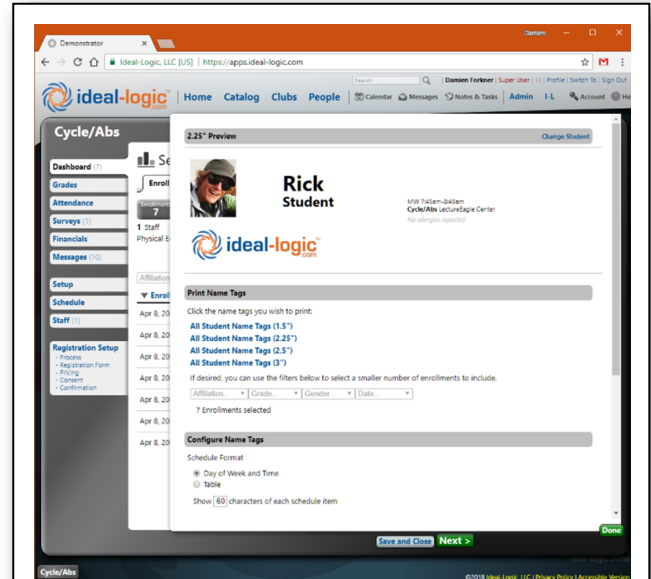
# Approach, Methodology, and Technology

## Reporting Overview

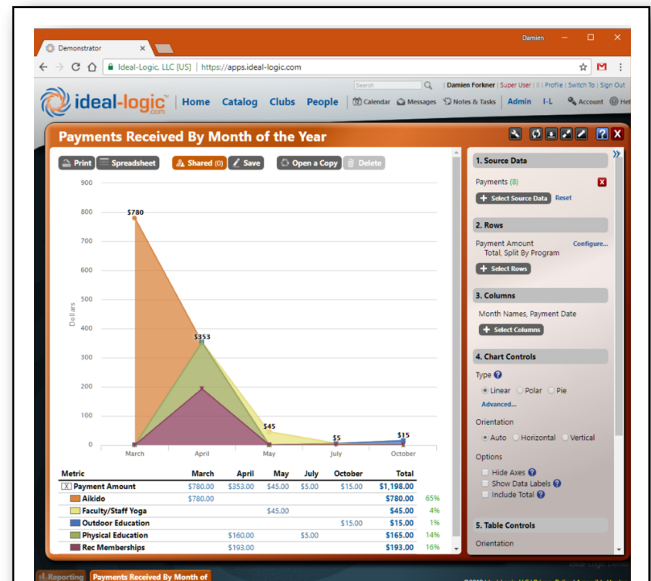


Ideal-Logic’s systems integrate reporting at many levels. Course instructors can log in to get data about their classes, department administrators can access data and reports for their departments, and higher level administrators can use advanced reporting functions to extract complex graphs and reports from the system.

- Spreadsheet Download.** Every data table in the system can be customized, filtered, sorted, and downloaded to a CSV file (Excel) with a single click. Custom reports can be saved and shared with other system users easily.
- Printed Reports.** The system includes many pre-built paper documents and reports that are used for various purposes. For examples, instructors and personal trainers can print attendance sheets, rosters, and special concerns lists for their courses. As part of our custom service, we can add new printable reports at any time.
- Integrated Dashboards and Gauges.** For metrics that really matter, we provide integrated real-time counts and totals into the interface to convey the data that’s most important to you. For example, when you open up a Pass, you’ll see gauges indicating how many people have purchased it and how much revenue has been earned. We can add more of these types of gauges as part of our service.
- Custom Reporting Interface.** We also provide a complex query/charting tool that can be used to generate many types of comparative reports and charts (e.g. “passes purchased by ethnicity,” or “revenue per fiscal year per department”).
- Custom Service.** Getting the right data the way you want it is sometimes a very complex problem to solve. Sometimes, something that can be expressed as a simple sentence in English is very difficult for a computer to produce. As part of our custom service, we recommend talking to us about your reporting needs and letting us help build the reports you need.



**Printed Document Example: Name Tags.** Instructors and staff can easily configure and print name tags for participants.



**Custom Reporting Interface.** Allows data to be aggregated and correlated over multiple axes. Print, save, share, or download a spreadsheet of results.

# Security and Compliance Overview



## Security Culture

Ideal-Logic's roots as a company come from automating intellectual property systems, which require fine-grained access control and extremely rigorous auditing, logging, and security protocols. Our development team brings security experience from IBM, Hewlett-Packard, and other large enterprise software systems. We deploy security as a combination of physical controls, hardware, software, processes, and organizational culture.

## Security Procedures

As a company policy, all data is encrypted with banking grade security protocols before it ever touches a disk or a network wire. Real-time, incremental, and full backups are fully encrypted before data is archived. Ideal-Logic's cloud infrastructure is designed for redundancy and security with security at every layer. Here are some of the security tools we use to be sure your data is secure:

- 256-bit encryption any time data is being sent over a network or written to a disk
- Hardened Linux servers
- Multiple layers of firewalls
- Cloudflare web application firewall
- Cloudflare Zero Trust to protect our internal services
- No server ports open on the Internet (Cloudflare Tunnels)
- Intrusion detection systems and centralized log monitoring (OSSEC)
- Network and web application scanning (Qualys)
- Active response mechanisms
- Offensive penetration testing (Metasploit, Kali)
- Port scanning (nmap)
- Fine-grained auditable access control
- Audit-quality logging of events
- Customizable password policies and security questions
- Multiple-factor authentication (when requested)
- Rigorous and thorough information security policies, procedures, and processes
- Background checks and ongoing security training for employees
- Development tools and procedures designed to prevent security lapses

## Developer Screening and Training

Ideal-Logic developers are carefully screened and trained for security. We particularly use the OWASP Top 10, but we use many other specific programming practices and techniques (for instance, Taint mode in Perl) to help protect the data our clients entrust to us.

## PCI Compliance

One major step Ideal-Logic takes to ensure security of its systems is to maintain SAQ-D level PCI (Payment Card Industry) compliance (v4.0). This rigorous auditing, designed to secure credit card data, helps us be sure our processes and controls meet industry standards.

## FERPA Compliance

Ideal-Logic is trained and well-versed in the Family Educational Rights and Privacy Act. Our systems include support for maintaining Directory-Level compliance and ensuring protection of personally identifiable information.

## HIPAA Compliance

Some Ideal-Logic systems, particularly registration systems, collect personal health information. Ideal-Logic ensures compliance with all aspects of HIPAA.

## ADA Compliance

Ideal-Logic uses the Web Content Accessibility Guidelines (WCAG) version 2.1 level AA as its standard for ADA compliance.

# Accessibility

Ideal-Logic is committed to providing a fully accessible solution that is fully compliant with the Americans with Disabilities Act and all related requirements. Moreover, we want to provide a system that works for everyone.

## **Voluntary Product Accessibility Template (VPAT)**

Ideal-Logic uses the Web Content Accessibility Guidelines (WCAG) version 2.1 level AA as its standard for ADA compliance. Current Voluntary Product Accessibility Templates (VPAT) are available at the following URLs:

- Version 2.4 (Current, January 2023): <https://apps.ideal-logic.com/vpat.pdf>
- Version 2.2 (November 2018): <https://apps.ideal-logic.com/vpat2.2.pdf>
- Version 1.3 (November 2016): <https://apps.ideal-logic.com/vpat1.3.pdf>

Ideal-Logic's windowing desktop user interface can be challenging for screen readers and assistive technology tools. Working with disability offices at a few different universities, we have created a version of the system optimized for this purpose. Via a text link at the bottom of every Ideal-Logic page and login screen (Accessible Version), users can access a version of the system without the windowing interface. In addition, this version of the system provides a higher level of labeling, headings, and specific form features that work better with screen readers.

## **Testing**

Ideal-Logic does internal testing to validate WCAG compliance. The last such testing occurred in December 2022 when we updated our VPAT to version 2.4.

Ideal-Logic has worked with disability offices at two universities to test and improve access to our system with screen readers and assistive technology tools. We received very positive feedback in our most recent round of improvements in this area.

## **Accessibility Roadmap**

There are no known accessibility gaps in the Ideal-Logic system at present. However, we treat accessibility not as a one-time goal but as an ongoing process. We always welcome feedback and input from users or experts in this area.

# Data Retention and Ownership

Data entered into Ideal-Logic systems is always owned by the client (not Ideal-Logic). We implement custom data retention policies for each client individually depending on their needs (the default is permanent retention).

- **Data Retention.** Data will be permanently retained unless Ideal-Logic is instructed otherwise.
- **Archiving Processes.** Ideal-Logic usually builds user-accessible archiving processes into the system. These generally take the form of an “Archive” button accessible to administrators that allow a particular item to be archived because it is no longer relevant. Usually, this just means that it is removed from the normal function of the system, but it is always still accessible (and restorable) from an “Archived Items” list. This entire process is configurable and controllable.
- **Data Accessibility.** All data entered in the system that has not been archived or deliberately removed will be indefinitely available to any user with access to view it. All data-viewing interfaces (tables, spreadsheets, lists) in the system automatically scale to handle large numbers of data items over many years. As data sets grow, more complex searching/querying/filtering features become available to help locate specific records. As part of our custom service, we work with our clients to help scale interfaces and workflow features as processes and their data sets grow over time.
- **Backups.** Ideal-Logic has never lost any data. Ideal-Logic has multiple offsite servers providing real-time backups of database transactions within seconds of their occurrence. Even in the event of a disaster that destroyed our server farm, we would not expect to lose any data. All backups are fully encrypted and secured according to the same standards as our production servers. Here are the backup mechanisms we use:
  - Multiple logical and physical storage mechanisms for each data object in our database.
  - Redundant databases in our primary server farm kept in sync in real-time.
  - Real-time backups to an offsite database that records changes within minutes of their occurrence.
  - Incremental hourly and daily backups to an offsite server.
  - Incremental hourly and daily backups to a third-party, external backup storage provider (Rsync.net).
- **Data Ownership.** Client is the owner of all data entered into the account. Client has the right to delete any data or request that it be deleted from Ideal-Logic’s servers at any time. Client also has the right to request an exported copy of all data from the account at any time. Ideal-Logic will make no use of data in the account without express authorization from the client.

# Initial Setup

We provide initial and ongoing support to all of our clients as part of our service. For initial setup, we often work very closely with clients via scheduled regular telephone/web meetings in order to get the system rolled out.

- **Setup Process.** For a system like this, we would expect to first identify the key players involved, then have meetings to fully understand the expectations and needs, then set up one or more regular meetings to work through issues and get feedback until the tool is rolled out.
- **I.T. Support.** No specific I.T. involvement is required to set up, roll out, or maintain this system, except to support individual integrations as required.
- **Learning Materials and Training.** We train all of our primary administrator(s) directly (via phone/web meeting), and we expect them to train other user groups or administrators as required. We are always available to participate or help with this task if it is appropriate. We integrate help documentation and training materials directly into our systems and processes. By default, we do not provide offline written documentation for our custom systems. When requested or appropriate to do so, we work with our administrators to produce training materials for their end users, although these materials are usually very specific to those client's processes.
- **Minimal Training Required.** One of the great benefits to a custom software service is that when something is confusing, we fix it. Our end user-facing interfaces generally never require training. Some of our clients provide training to their user groups, but this training often ends up being more about their processes than the software system. The most difficult training challenge is middle-level administrators, who have many configuration options and limited time to spend learning the system. We work with our primary administrators to help support this user group according to their individual needs.



# Timeline

The following timeline shows an anticipated rollout schedule and the involvement of major players. Upon acceptance of this proposal, Ideal-Logic will work with Texas A&M University System to build a prioritized schedule and rollout plan.

	<b>Ideal-Logic</b>	<b>TAMU Project Lead(s)</b>	<b>TAMU I.T.</b>
<b>Project Start</b>	Project organization	Meet with I-L to initiate project	Meet with I-L to spec out integration projects
<b>Month 1</b>	Implementation start	Meet bi-weekly with I-L to review progress	Assist I-L with SSO and Payment Site integration
<b>Month 2</b>	Launch for admin users	Login and begin testing	Assist I-L with other integrations
<b>Month 3</b>	Beta launch for testing	Training and testing	
<b>Month 4</b>	Launch for all users	Work with I-L to resolve any issues	Validate all integrations and transition to support mode
<b>Rest of First Year</b>	Refine system based on usage and feedback	Monthly check-in meetings	
<b>Second Year</b>			
<b>Future Years</b>			

# Project Management

## Project Management and Process Methodology

Ideal-Logic provides a suite of tools and processes to manage development and track tasks related to system implementation, roll-out, and delivery. At its heart, the system is a hierarchical queue of development tasks and deliverables. We will initially populate this queue with content from the proposal and our understanding of the project, and we expect to work with TAMU continually to refine this queue as our understanding of the project improves.

We have created 10+ Youth Safety systems, and we have the basic foundation in place that we can customize to match your processes.

In our experience, it is usually not possible to have every piece of functionality ready for initial roll-out, nor is it desirable to do so. We usually try to focus on the critical pieces first and refine them until they work smoothly before adding in more pieces. As part of our custom application service, we expect to expand the features and capability of the system over time. We will work with TAMU to make sure we are targeting the critical areas appropriately, especially in the initial implementation period.

## TAMU Resources

The initial need for the first six months of the project will be access to some key resources at TAMU to assist us with rollout:

- **Primary Contact.** We will need one or two people who will serve as our primary point of contact for this project. Ideally, this will be someone who knows most or all of the relevant processes well and is willing to help negotiate the relative needs and priorities of each program area. We expect to have one person that we can refer to for final say on prioritization, new feature requests, and other development questions that we cannot answer. The more this person is willing to engage with us, help us gather information, and help us prioritize our development, the more likely a successful rollout will be. We will need to meet with this person weekly or bi-weekly via a phone and in-person. This will be the resource we will turn to whenever we have a question.
- **I.T. Resources.** In implementing the system at TAMU, much of the work will be customizing the system with the assistance of our Primary Contact(s). This work can be done independent of TAMU I.T. We will work with TAMU I.T. resources to complete any integration projects (e.g. Background Checks, Safety Trainings, etc.).

# Testing and Development



Ideal-Logic provides multiple levels of testing/development environments to its clients depending on their needs.

- **Built-In Previews.** For many of our client-configurable features, we provide built-in previews of output right alongside the configuration interface. For instance, when configuring a new registration form, there is a live preview mode that shows what the registration form will look like for end users.
- **Flagged Testing Data in Production Environment.** Many of our clients configure test environments directly in their production accounts. We have built in some testing flags to support this. For instance, it is possible to add a new program to the system and flag it as a “Test Program.” This makes it available in administrative interfaces and allows it to show up to designated end users. However, it does not appear in reporting or general end-user interfaces.
- **Separate User Accounts.** Many of our high-level administrators create personal accounts on the system using a personal email address so that they can interact with the system in exactly the same way as an end user. This provides a foolproof way to test the complete process that an end user will experience.
- **Independent Testing Account.** At no extra charge, we can provide a completely independent test environment in our production system. The data is completely separated, but the functionality and configuration are the same. This allows for end-to-end testing in more complex scenarios.

For a system of this scope, we would expect all four of these strategies to be used. We expect to work with Texas A&M University System to configure the best testing possible for different purposes.

**No extra charge.** Testing and development sandbox support as described above is part of our service and provided at no extra charge.

**Custom Form Design.** This interface is used to add custom questions to a registration form. Configuration is on the left and a live preview is shown on the right. A similar approach is used for other tasks in the system, such as designing certificates or paper documents.



# Working With Ideal-Logic (1/2)

Ideal-Logic provides a suite of processes and tools as part of its service to prioritize and resolve problems as quickly as possible. Efficient, timely response is a critical component of Ideal-Logic’s service. These processes and tools include:

- Immediate, automated developer notification of system errors or downtime
- Integrated help and support tools for users that create a database of help and feature requests
- Prioritization and classification tools for these requests, including time tracking and deadlines

## System Errors

In practice, Ideal-Logic responds to critical system issues within minutes. Errors and bugs are almost always handled within a few hours during normal work hours (M-F 8am-5pm PST). Outside of normal business hours, we provide best effort service based on the urgency or impact of a problem. A service issue can be escalated by sending an email to support@ideal-logic.com (which is checked at all times) and/or call 541-230-1087 and press 9 (which sends a message/text directly to our on-call support person). This should only be used in urgent situations.

## Requests for Features and Functionality

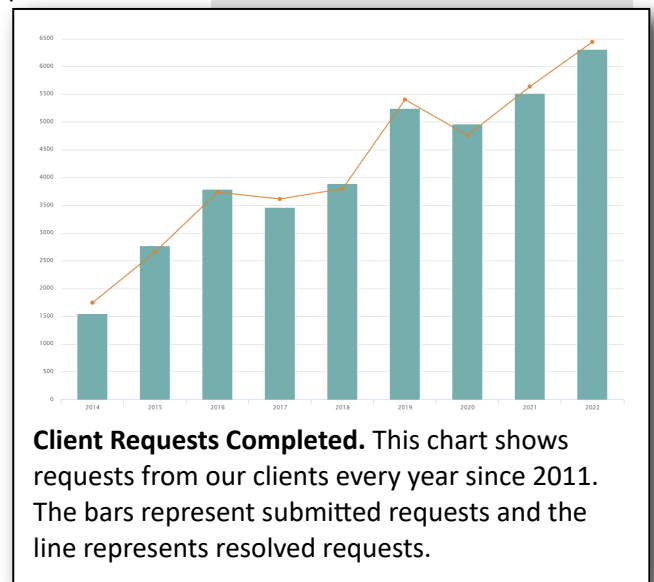
Requests for new features and functionality can be created by any user of the system. Account owners have the ability to review, prioritize, and classify these requests. Ideal-Logic works with clients to implement changes and updates as rapidly as possible. For a new module or feature, we commonly provide dozens or sometimes hundreds of updates over a relatively short period of time. For a more mature system, we roll out changes more slowly and deliberately, involving key administrators and users in the planning and release processes.

New features and functionality are provided at no additional charge as part of Ideal-Logic’s service. This is always the case unless the request is outside the scope of the problem we are contracted to solve. We will always provide feedback if we believe that a feature request is out of scope, and we can discuss how best to proceed.

## Service Response Times

In the last five years we have resolved over 23,000 requests from our customers, including new features, improvements, tweaks, and fixes. Of these 23,000 completed requests:

- 28% were resolved in less than 2 hours,
- 50% were resolved in less than 24 hours,
- 71% were resolved in less than 1 week, and
- 81% were resolved in less than 2 weeks, and
- only 19% required more than 2 weeks to resolve, generally because they were larger projects.



# Working With Ideal-Logic (2/2)



Ideal-Logic does not provide direct end user support. System support tools and integrated help mechanisms are designed to route end users to the appropriate point of contact within your organization. Except in extraordinary circumstances, Ideal-Logic will never communicate with your end users directly. When we receive help requests directly from end users, we will route them to you. When we detect an end user support issue or problem, we will fix the error and then ask you to notify the end user that the issue has been corrected.

Ideal-Logic generally expects all feature requests, change requests, and other work to be prioritized and communicated to us from a single source. This can be a specific designated administrative lead (with backup) or a committee. We will often resolve, fix, or upgrade your application on our own initiative (often in response to user help requests), but we expect a single point of contact who can help us resolve development priorities and conflicts.

One of the benefits of Ideal-Logic's service is that we will correct or change places in the system that are causing confusion or support load. We will always work with you to be sure that the end user support load is manageable.

## Request Counts

Many of our clients have requested hundreds or even thousands of new features and changes to their systems. This is a normal part of refining and expanding the usefulness of an Ideal-Logic solution. From our own data, we can make some generalizations about how many changes to expect, on average.

Very Large Systems, Campus-Wide:

**>500 requests per year**

Large Systems, Campus-Wide:

**>300 requests per year**

Department-Level Systems:

**>100 requests per year**

**Susan Yeager**, Administrative Program Assistant, OSU Professional and Continuing Education:

"Ideal-logic is actually one of the best tools I work with at my job. I have been working with it daily for two and a half years and I only have positive things to say about the program and the staff. The program is so intuitive that I was able to pick up the basic use quickly. I train people in Extension offices all over the state to manage the registrations that I set up for them, and also how to set up their own registration forms. Ideal-logic's friendly user-interface makes it easy for me to do most of the training with the remote offices by phone. Extension has also been happy to use it, as 2017 saw over 24,500 enrollments go through Ideal-logic, a number I can pull up in 5 seconds from their reporting function.

It is also a dynamic program and many of the registration set ups that I use it for are very outside the box. I have called up Paul and Damien many times for advice or help to do a set up a certain way, and they always have a solution. Sometimes they even have to custom build the feature that solves my problem! Their customer service and responsiveness to my questions is the best I have ever encountered in any business. Even though I know how busy they are, they always say they have time to talk to me. I can rely on them to be responsive and available, and to have solutions for whatever issue has come up for me and my work.

I am very grateful that we have Ideal-logic as a resource. Please feel free to contact me if you have any questions."

# Training and Technical Support

## Training

Ideal-Logic provides training as part of our service. This includes initial training as part of system development and roll-out and additional training for new administrators and new features over time.

- **Learning Materials and Training.** We train all of our primary administrator(s) directly (in person or via phone/web meeting), and we expect them to train other user groups or administrators as required. We are always available to participate or help with this task if it is appropriate for us to help. By default, we do not provide documentation for our custom systems. When requested or appropriate to do so, we work with our administrators to produce training materials for their end users, although these materials are usually very specific to those client's processes.
- **Minimal Training Required.** One of the great benefits to a custom software service is that when something is confusing, we fix it. Our end user-facing interfaces generally never require training. Some of our clients provide training to their user groups, but this training often ends up being more about their processes than the software system. The most difficult training challenge is middle-level administrators, who have many configuration options and limited time to spend learning the system. We work with our primary administrators to help support this user group according to their individual needs.

## Technical Support

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Ideal-Logic generally expects all feature requests, change requests, and other work to be prioritized and communicated to us from a single source. This can be a specific designated administrative lead (with backup) or a committee. We will often resolve, fix, or upgrade your application on our own initiative (often in response to user help requests), but we expect a single point of contact who can help us resolve development priorities and conflicts.

One of the benefits of Ideal-Logic's service is that we will correct or change places in the system that are causing confusion or support load. As a result, end user support issues are usually related to your processes and not system issues. We will always work with you to be sure that the end user support load is manageable.

# Upgrades and Feature Requests

Ideal-Logic's service is designed to provide a continuous stream of upgrades as part of its normal functions. Upgrades and changes always occur at no additional charge, unless such upgrades are out of scope of the contract.

**Upgrade and Feature Requests.** Clients may request new features, changes, improvements, and upgrades at any time. Ideal-Logic provides a support queue tool for administrative users to review, prioritize, and track these requests at any time.

**Vendor-Initiated Upgrades.** Ideal-Logic occasionally makes improvements to its platform that cause more widespread effects to particular clients. In such cases, we always communicate with the client via phone or email before rolling out changes.

**Small Changes.** Small changes, process tweaks, and new process features are generally completed and published to our production environment immediately. Depending on the nature or scope of the change, we may:

- Schedule a meeting to walk through the new functionality in person and get feedback before rolling it out.
- Communicate with the client to work out a roll-out strategy and timeframe.
- Roll out the changes and send a notification to the client after the fact.
- For many minor changes, we may roll them out and send a batch notification via email to let the client know what's changed.

**Large Changes.** Larger changes, usually the result of major process changes, significant rewrites, or new features or functionality, are always rolled out with client involvement. Depending on the nature or scope of the change, we may:

- Schedule a regular meeting (e.g. weekly) to work on the project with you.
- Have a phone call or web meeting to review the functionality.
- Send written descriptions of the functionality for feedback.
- Roll out the change at a time when it will not cause any disruption to staff or end users of the system.

**Additional Charges.** Changes, new features, improvements, tweaks, fixes, and even rewrites of entire functionality within the scope of the project/contract are covered by the Annual Service Charge. Additional charges are only assessed when:

- New features or functionality are requested that expand the scope of the project (e.g. adding a new process or workflow).
- The scope of the system grows (e.g. adding a new group of users to the system to log in and interact with the system).
- Integration with external systems is required.

We never undertake work that would require additional charges without written consent from the client to begin. Such projects can be billed at our \$150/hour development rate or charged a flat rate for each project.

## Request Counts

Many of our clients have requested hundreds or even thousands of new features and changes to their systems. This is a normal part of refining and expanding the usefulness of an Ideal-Logic solution. From our own data, we can make some generalizations about how many changes to expect, on average.

Very Large Systems, Campus-Wide:

**>500 requests per year**

Large Systems, Campus-Wide:

**>300 requests per year**

Department-Level Systems:

**>100 requests per year**

# Project Scope Expansion

Ideal-Logic's custom application service price includes changes and modifications that fit within the scope of the problem that we are contracted to solve. Sometimes, work needs to be done that is outside of scope or that extends the scope. Here is our process for handling such work:

- **Scope Determination.** We work with our clients to determine that a request is out of scope. This can sometimes be a fuzzy line, so we communicate openly when we think a project or request is out-of-bounds.
- **Hourly Rate.** Custom out-of-scope development work can be done by Ideal-Logic at our development rate of \$150/hr. This is uncommon.
- **Per-Project Charge.** Usually, we provide a one-time total price for an out-of-scope development project and the client agrees to the total charge (e.g. \$2000 to add a connection to an external system). The per-project total is based on our hourly estimates of the time required to complete the work.
- **Scope Expansion.** Frequently, we add addendums or modifications to our client contracts to expand the scope and incorporate more process or different user groups. These usually come with an increased annual charge and/or a one time implementation charge. We pro-rate any such charges appropriately and can either bill these additional charges independently or roll them into the annual invoice.
- **Integration with External Systems.** Except as specifically spelled out in this proposal, integration work with external systems is always billed per-project or hourly. Integration with any external systems not specifically covered in this proposal will be at an additional charge.
- **Written Consent Required.** Ideal-Logic will never undertake work that will generate an additional charge without written consent for the project ahead of time.

**Meddie Sims**, Enrollment Specialist, OSU Professional and Continuing Education:

"I have been working with Ideal-Logic since I started at Oregon State University about two and a half years ago. I work in the systems provided by them daily, and on busy days, hourly. I usually have at least four instances of their program open at the same time, which allows me to multitask between projects and still respond to student needs as necessary.

The system is extremely flexible and comprehensive and gives us the ability to do "deep dive" reporting. Ideal-Logic is comprised of individuals who are responsive, supportive, and very willing to explain a feature or process to me if I don't understand. In addition, the company is also responsive to our needs. If we have an issue not already addressed in the system, or if we have a feature that would help us be more efficient, they will do all they can to remedy the situation and/or add a feature.

In summary, I really can't say enough good things about Ideal-Logic and the people who work there. More than any vendor I've ever worked with, they are there for us."



# System Pricing

	Year 1	Year 2	Year 3+
Annual Service Charge			
<b>Participant Registration System</b> Excludes Texas A&M University - College Station			
Prairie View A&M University	\$7,000	\$7,000	\$7,000
Texas A&M University - Commerce	\$1,000	\$1,000	\$1,000
Tarleton State University	\$7,000	\$7,000	\$7,000
West Texas A&M University	\$10,000	\$10,000	\$10,000
Texas A&M University - Kingsville	\$1,500	\$1,500	\$1,500
Texas A&M University - Corpus Christi	\$5,000	\$5,000	\$5,000
Texas A&M International University	\$2,500	\$2,500	\$2,500
Texas A&M University - Central Texas	\$1,000	\$1,000	\$1,000
Texas A&M University - San Antonio	\$1,000	\$1,000	\$1,000
Texas A&M University - Galveston	\$2,800	\$2,800	\$2,800
One-Time Implementation Charge One time charge (setup fee) to cover time spent working on the project during rollout. Includes: <ul style="list-style-type: none"> <li>• Process consultation and research</li> <li>• Initial implementation of custom system</li> <li>• Customization and branding as desired</li> <li>• Delivery, initial training, and phased rollout</li> </ul>	\$12,000		
Integrations System price includes integration with: <ul style="list-style-type: none"> <li>• Spreadsheet import/export</li> <li>• Custom API to extract data from the system</li> <li>• Single Sign-On and Directory</li> <li>• Payment Site Integration</li> <li>• Other custom web embed “widgets” as required</li> </ul> Additional integration projects are <u>not included</u> and will be priced separately, per-project or hourly.	\$2,500		
<b>Totals</b>	<b>\$53,300</b>	<b>\$38,800</b>	<b>\$38,800</b>

# System Pricing Details

## Participant Registration System - Annual Service Charge

All-inclusive annual fee that includes:

- Ongoing consultation and revision to meet client needs
- System usage for all users and admins
- Maintenance, service, support, and upgrades
- All services and features described in this proposal

**Pricing shown on the *System Pricing* page is for the Participant Registration System and all features described in this proposal.**

**This proposal is for the following Texas A&M University System Universities that offer the following estimated programming each year:**

Prairie View A&M University: 24 camps; 4100 participants  
Texas A&M University - Commerce: 17 camps; 662 participants  
Tarleton State University: 94 camps; 4146 participants  
West Texas A&M University: 50 camps; 6000 participants  
Texas A&M University - Kingsville: 12 camps; 748 participants  
Texas A&M University - Corpus Christi: 100 camps; 3100 participants  
Texas A&M International University: 5 camps; 1500 participants  
Texas A&M University - Central Texas: 3 camps; 58 participants  
Texas A&M University - San Antonio: 15 camps; 600 participants  
Texas A&M University-Galveston: 26 camps; 1650 participants

**A discussion between the Texas A&M University System and Ideal-Logic will take place going into the next contract year to determine if there is a need to adjust the annual service charge based on increased usage of the system beyond what is listed in this proposal for each university.**

**If a university or group wants to join after the fact**, then the number of camps and participants will be calculated against the current rate used in this proposal (\$1.67 per participant; with a minimum of \$1000) along with a one-time implementation fee of \$2500.

**One or two admins will be the point people for each university and will facilitate communication and feature requests between Ideal-Logic and these universities.** The pricing in this proposal is dependent on university admins being trained up to use the system and provide frontline support to their customers and end-users. Ideal-Logic will support these university admins through regularly scheduled group meetings talking through what is working and what needs to be adjusted or fixed.

Annual service charge rates are subject to change. You will be notified a minimum of 90 days before renewal of any increase in service charges. If Texas A&M University System requests changes or new modules that are outside the scope of this proposal, then Ideal-Logic will prepare a new proposal for the new functionality. An authorized representative of both Ideal-Logic and Texas A&M University System will need to agree in principle or compose a written amendment for additional work before such projects will be undertaken.

This proposal pricing is only applicable if these universities are all using the system. Otherwise, Ideal-Logic will provide a new proposal based on the universities that will continue to use the system.

**Pricing is valid until November 30, 2023.** This proposal is only for Texas A&M University System.

# Invoicing and Payment Terms

## Payment Schedule

Ideal-Logic bills clients as follows:

1. The **One-Time Implementation Fee and first year's Annual Service Charge** are due upon contract signing.
2. Once the application is delivered and deployed for testing, we will fix a **Service Start Date**. This does not necessarily mean that the application is 100% complete and all processes are implemented, but it means that you have logged in and started using the system beyond simple initial configuration. The date when this occurs is mutually agreed upon by you and Ideal-Logic.
3. The **second and subsequent year's Annual Service Charges** are due on your renewal date (*before* the year of service to which they apply), which is on the anniversary of your Service Start Date each year.

If the scope of your contract ever expands to include additional annual service charges (for instance, if you add a new process to your system), then these annual charges will be pro-rated to the remainder of your current service year. Then they will be billed in full for subsequent years along with your existing annual service charges. (Note: any such changes must be agreed in advance and in writing, as described on Page 43: *System Pricing Details*.)

## Invoicing

- Ideal-Logic typically issues invoices 30 days before your renewal date with Net 30 payment terms.
- We accept payments via check or electronic funds transfer.
- We can work with your AP department and use Texas A&M University System processes as required.

## Additional Fees

Quoted prices are all-inclusive. As described on Page 42: *System Pricing*, there are no additional fees to work with Ideal-Logic.

Any expansion of scope, new integration projects, or other system changes that might require additional fees require agreement in writing before Ideal-Logic will undertake such work.

# Pricing FAQ

## How are your prices calculated?

Ideal-Logic prices are computed based on several factors:

- The size and scope of the problem to be solved,
- The number of users (particularly administrative users), estimated size of the data set, and the anticipated growth of this data set over time,
- The complexity of the processes to be implemented and our estimates of how much these processes will evolve over time,
- The amount of infrastructure (servers, backup, etc.) that will need to be deployed and maintained,
- The amount of time we anticipate spending on the application, both in the first year and future years, and
- Experience and comparison with similar systems we have deployed in the past.

In most cases, the majority of the cost in our proposals is time (man-hours). Infrastructure costs are fixed and relatively low by comparison. We do everything in our power to reduce the amount of time required by reusing similar components from other systems, sharing functionality with other clients when possible, and continuing to improve our development processes. It is our goal to provide a full custom solution for a fraction of the cost.

## I don't expect many changes to my application. Can I pay a lower annual service charge and just pay for changes as I need them?

The short answer is "no." The long answer is that we have tried this approach many times, and it has never led to a useful solution. In order to deliver the best solution possible, we need you to have the freedom to call us anytime and tell us that something's not working the way you need it to work. You also need to have the freedom to call us and share a great idea to make some part of the system better that's going to save a lot of time and energy. We, in turn, need the freedom to say, "Great idea. Let's do it." We have found that this does not work if we have to negotiate a price for every change.

However, sometimes our clients with budgeting constraints pay for several years of service up front in order to make the service function more like a capital expenditure. We are happy to help with this.

## Will my price ever change?

When you contract with us, we are committing to do whatever it takes to solve the problem for the price we propose. Presuming the problem to be solved does not increase in scope beyond what's documented in this proposal, your price will stay the same.

If you ask us to build something beyond the scope of this proposal, then we will prepare a proposal for the expanded scope and present it to you.

Finally, we are always working to make our service cost less in terms of money and man-hours required to provide it. We normally re-evaluate our clients after their third year of service to see how things have changed. However, you can expect to pay the service charge as specified here for at least three years, as it often takes us that long for a project to mature and stabilize.

## Participant Registration References

# Reference List

The following list of primary contacts all work closely with us at their respective universities. All are open to contact regarding their experience working with Ideal-Logic.

**Karen Swanger**

Director, KidSpirit, Oregon State University  
karen.swanger@oregonstate.edu  
(541) 737-5437  
*System: Youth Registration System*

**Leekeshia Williams**

University of Texas at Austin  
leekeshia.williams@austin.utexas.edu  
(512) 471-0594  
*System: Youth Safety and Compliance System; Participant Registration System*

**Greg Linke**

Director, Pre-Collegiate Programs Office, Clemson University  
glinke@clemson.edu  
(864) 656-5716  
*System: Youth Safety and Compliance System; Participant Registration System*

**Becky Sapper**

Director, Wisconsin Master Naturalist Program  
becky.sapper@wimasternaturalist.org  
(715) 685-2652  
*System: Volunteer Tracking and Management*

**Wil Young**

Contract Manager, Purchasing and Contracting Services, University of Oregon  
wyoung@uoregon.edu  
(541) 346-2418  
*System: Procurement, Contract, and Vendor Management System*

**Carly Weber**

Systems and Registration Manager, Conference Management Services,  
Oregon State University  
carly.weber@oregonstate.edu  
(541) 737-8021  
*System: Conference Registration System*

# Client List

Here is the current list of clients that use the Participant Registration System in a variety of ways to accomplish their registration processes:

**Colorado College**  
**Clemson University**  
**Georgia Institute of Technology**  
**Middlebury College**  
**Oregon State University**  
**Purdue University**  
**Rochester Institute of Technology**  
**Southern Oregon University**  
**Stanford University**  
**University of California, Davis**  
**University of California, Los Angeles**  
**University of Oregon**  
**University of Texas at Austin**  
**University of Washington**  
**Whitman College**  
**University of Manitoba**  
**University of Wisconsin, Madison**

# Oregon State FSF (1/2)

Client Since	Active Users	Requests/Features Completed
2015	12,458	972

Oregon State University Faculty Staff Fitness (FSF) was looking to replace an Access Database registration system with a new registration system. FSF specifically wanted to improve the registration process for faculty, staff, and students, offer flex passes, and have the ability to track class budgets. Ideal-Logic provided a solution for an online registration system tailored to how FSF structures their classes with the ability to register for individual class days (e.g. Monday, Thursday) offering greater flexibility than was previously available to them.

Prior to using Ideal-Logic, FSF used an Access database for registration for their fitness classes. This Access database was older and could not keep pace with the changing needs of FSF. FSF worked around these limitations by collecting additional registration information separately from the Access database. This included a white board in the FSF office tracking how many spots were registered for/available for each class day (since they want to provide flexible class offerings). Through Excel spreadsheets and other methods, they were able to track class registration and class budgets. This demanded many hours from the FSF staff to manage all these divergent processes in separate software tools and ensure up-to-date information.

When FSF approached Ideal-Logic to create a system for them the goals were clear:

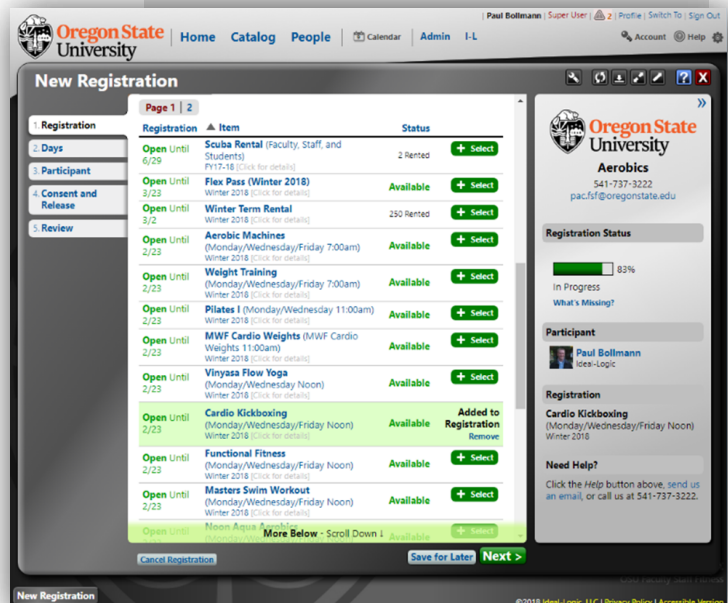
- Easy-to-use and intuitive user interface for faculty, staff, and students and comprehensive registration system for fitness classes.
- Ability to offer registration for other types of events and activities and offer flex passes, which they were previously unable to offer.
- A system that could grow with FSF as they moved into new areas in the future.

**FSF Registration Form (Right).** Shows current course offerings, collects participant data and payment.

**Drew Ibarra**, Director of Faculty Staff Fitness:

“I often find that the Ideal-Logic system can be challenging to explain, because it is like no other. I have not seen a system that allows you the customization and options all in one space that Ideal-Logic does. The ability to design to what you want versus fit what you want to the design is really what makes it unique and the one-size fits all option.

We moved from using an Access database in our registration of fitness classes to the Ideal-Logic system. In doing this, we have moved lightyears ahead in the service we can provide because this system has helped us streamline and communicate our operations so much more effectively than the older systems we have had. The design and flow of the system make it easier to navigate, and if you don't like something, you can change it. Because of the fully customizable options in the system, it has now taken on operations of our Fitness class registration, Locker and Towel service, and Scuba gear and rentals to another level. I can manage everything in one place and do not have to move between systems or personally have to integrate information from one system to another.”



# Oregon State FSF (2/2)

Over only a 3-month period Ideal-Logic was able to implement a custom registration system which allows FSF to:

- Allow users to register for fitness classes and then select the individual days they would like to attend.
- Have detailed registration information which makes it possible to maximize the number of users registering for the fitness class days. Prior to this, it was always a challenge to know how many classes to offer and whether they were full or not.
- Allow FSF to offer other kinds of items including events (e.g. triathlons, Grid Iron Races), conferences, flex passes, and much more.
- Use a budgeting tool to see how profitable each fitness class was during a term based on the pay for the instructors and the number of participants.

After the success of implementing the processes laid out in the original proposal, FSF wanted to expand the system to encompass more processes and programs. FSF asked Ideal-Logic to implement the following modules which have since been delivered:

- A locker and towel rental solution for managing and tracking lockers, locks, and towels inventory and associated rentals.
- Users can rent lockers and towels as a standalone purchase and/or as part of a registration for fitness classes.
- Card swiping for easy check-out of towels at office and equipment cage locations across multiple buildings.
- Easy reporting on locker and towel usage and the ability to print clear locker reports for maintaining available lockers.
- A scuba equipment inventory and rental solution for managing and tracking all equipment and rentals for the OSU Academic Diving program.
- The ability to track equipment rentals for individual and class use along with the maintenance history of individual pieces of equipment in one place.
- Vastly expand scuba gear rental offerings to faculty, staff, students, and the community. Previously, all rentals were done on paper forms and were tedious and time-consuming.
- Ability to offer complex reporting to track cost/revenue analysis, rental income, equipment life-cycle, maintenance and more.

**Drew Ibarra**, Director of Faculty Staff Fitness:

“The system is fantastic, but I believe their service is what really sets them apart. I know they have multiple clients, even universities, but somehow, they are able to respond and follow up on issues extremely quick, even in the same hour I have had them fix or change something for me. They are very easy to work with and are extremely humble about what they provide. I often brag for them when speaking with other colleagues. One of the other major benefits is that because they have many clients, they can offer new and unique creative ways that other universities and programs might utilize or include to improve their programs. So, you don’t just get their knowledge and service, you are getting the combined creativeness and experience of all their clients. We continue to look for opportunities within our own programs that could benefit from there service and expand the areas that they provide efficiency and support for our programs.”



# Colorado College

Client Since	Active Users	Requests/Features Completed
2012	12,918	3,668

Ideal-Logic began working with the Outdoor Education program at Colorado College in 2012. The system was specifically designed to assist with their new student orientation trips and then expanded out to all of their outdoor trips and other events.

After successfully creating a system for Outdoor Education, we were approached by several other programs across campus that sought a solution to problems that no off-the-shelf software had yet been able to provide. Eventually, we implemented solutions for the following offices and programs on campus:

- **International Programs.** Registration and course approval processes for CC students studying abroad. Collects course equivalencies and gets registrar, major, and minor approval. Provides tracking and review/approval process for students seeking financial aid.
- **Collaborative for Community Engagement.** Supports student organization management, service groups and community partners. Provides database of service opportunities and comprehensive volunteer hour tracking including configurable and printable student portfolios, event registration, incident reporting, and numerous other functions.
- **Writing Portfolio.** All CC students submit a writing portfolio through Ideal-Logic as part of their degree process. Faculty at CC use a custom review process to select, read, rate and track results for every writing portfolio.
- **Student Life.** Provides registration and tracking for various events, activities, trips and student opportunities.
- **Academic Dean’s Office.** Provides scholarship and grant applications and manages complex review processes for each application.
- **Office of Field Study.** Provides planning, tracking, and risk mitigation for class trips taken by CC classes.
- **Summer Session.** Financial aid requests, housing applications, course proposals, and other processes related to CC Summer activities.

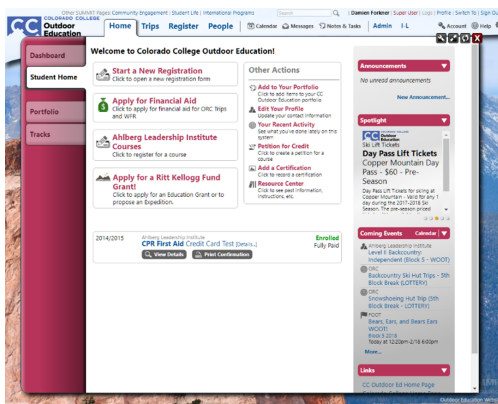
**Ryan Hammes**, Director of Outdoor Education, Colorado College:

“Ideal-Logic has been a pleasure to work with over the past 6 years. Being a small operation, I continue to be impressed at how quickly they are able to remedy and modify our platforms. The success of their platform used for the Outdoor Education program quickly grew to the use of other offices across the College including International Programs, Dean’s Office, Student Life, Collaborative for Community Engagement, and Office of Field Studies to name a few.

Although each of these offices use the platform differently as it is customized for each office’s purpose, it provides a consistent look, feel, and database of student content, registrations, and trip logistics. Ideal-Logic has taken the time to fly out to our campus to meet with various folks across the institution to better understand how their systems can help each office achieve their outcomes.

No platform or software will do everything that your institution needs however there have been many instances in which Ideal-Logic has problem solved to implement new customizations that other competitors simply wouldn’t have spent the time/effort to do so. “

Case Studies: Colorado College



# Oregon State PACE/Extension/4-H

Client Since	Active Users	Requests/Features Completed
2012	200,359	6,586

Ideal-Logic began working with Professional and Continuing Education (PACE) at Oregon State University in 2012 to implement a system for non-credit course registration. A key benefit to the system is that it can connect to TouchNet uPay for credit card payments and customers could register through the system without having to become an OSU student. In addition, many of the courses were offered through Drupal at the time, which we were able to establish a connection to in order to pass grade information through our system. The same process was used later to make a connection with Canvas. Before the Ideal-Logic system was developed, PACE was unable to find a system which could handle their large variety of course offerings and registration processes, including bundled workshops, certificate-based classes, events, and conferences, to name a few.

Many of these programs are certificate-based, and the system tracks a customer's progress towards completing those requirements and issues a printable certificate when completed. Over time, the system has been able to integrate with and push and pull data from various outside systems, including HubSpot, Basno Badges, Google Analytics and InCommon. This later expanded into Extension and all the county offices offering their workshops and courses through a separate account. The requirements of the county offices included even more features and functionality to capture their unique registration processes, and Ideal-Logic continues to meet all their needs.

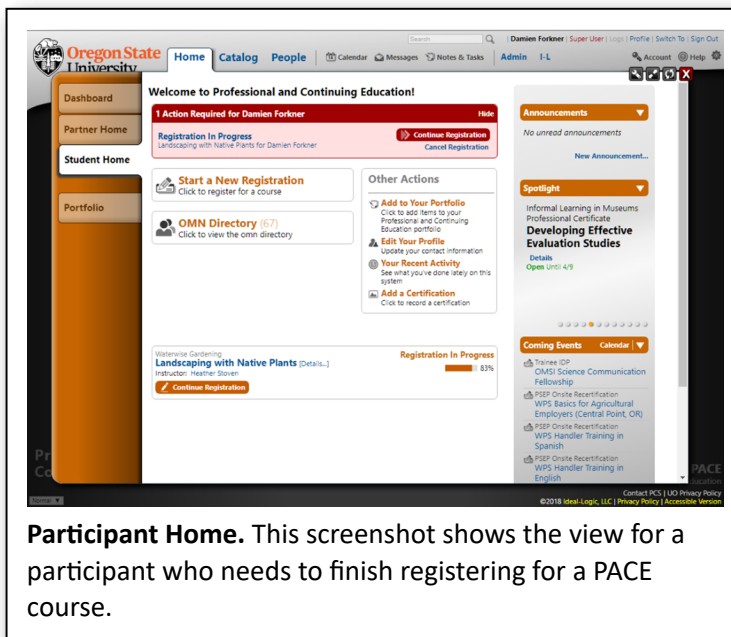
**Meddie Sims**, Enrollment Specialist, OSU PACE and Extension:

"I have been working with Ideal-Logic since I started at Oregon State University about two and a half years ago. I work in the systems provided by them daily, and on busy days, hourly. I usually have at least four instances of their program open at the same time, which allows me to multitask between projects and still respond to student needs as necessary.

The system is extremely flexible and comprehensive and gives us the ability to do "deep dive" reporting. Ideal-Logic is comprised of individuals who are responsive, supportive, and very willing to explain a feature or process to me if I don't understand. In addition, the company is also responsive to our needs. If we have an issue not already addressed in the system, or if we have a feature that would help us be more efficient, they will do all they can to remedy the situation and/or add a feature.

In summary, I really can't say enough good things about Ideal-Logic and the people who work there. More than any vendor I've ever worked with, they are there for us."

Case Studies: Oregon State PACE/Extension/4-H



**Participant Home.** This screenshot shows the view for a participant who needs to finish registering for a PACE course.



# Texas A&M University System

## Youth Safety & Compliance System



Contact: Paul Bollmann  
paul@ideal-logic.com  
(541) 230-1087

Ideal-Logic, LLC  
101 SW Western Blvd., Suite 104  
Corvallis, OR 97333

<http://www.ideal-logic.com>

May 2, 2023

Ideal-Logic, LLC  
101 SW Western Blvd., Ste. 104  
Corvallis, OR 97333  
<http://www.ideal-logic.com>

Dear Charles,

Thank you for taking time to review our proposal. Ideal-Logic has been a trusted partner working with youth programs since 2011, when we first started working with KidSpirit on the Oregon State University campus.

Here are a few things to keep in mind as you read:

- **We offer a service, not a product.** This is the single biggest advantage you get by using Ideal-Logic. Real-world organizational software problems are complex and intricate, and it takes time, energy, and perseverance (often with wrong turns along the way) to solve them well and realize the benefits. We make as many changes, improvements, upgrades, and rewrites as it takes to produce a solution that truly solves the problem.
- **We love supporting youth programs.** We have been working with youth programs in the United States and Canada since 2011. While we know that every program is unique, we bring strong experience rolling out similar systems to many other programs. We are currently implementing Youth Safety systems at twenty-one other universities. Similar systems in use elsewhere give us an advantage to get your system up and running quickly. These components will be fully customized to meet Texas A&M University System's needs as part of our service.
- **We are a small company with a big track record of success.** As a small company, our business depends on the success of our partnership with each of our clients. You will be working directly with the developers, and we are personally invested in our projects. Our partnerships have been tremendously successful, because our solution really works, and it works well over time.
- **We enjoy what we do.** We enjoy building systems like this, and we are committed to a great long-term partnership. We look forward to growing with you! Our goal as a company is to serve our amazing clients and to create great sustainable jobs for our community.

We believe that our service, as described in this proposal, will meet your needs as an organization, and we believe that our service will be a great fit for Texas A&M University System going forward.

On behalf of Ideal-Logic, thank you for the opportunity to submit this proposal, and we look forward to a productive partnership with you.

Sincerely,



Damien Forkner  
President

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# About Ideal-Logic



Ideal-Logic was founded in September 2008 with the commitment to create high-quality, affordable custom software applications as a service. We are a small company based in Corvallis, Oregon, near the campus of Oregon State University.

Our technical credentials include decades of experience building and supporting large-scale web-based workflow and data management systems. On the business side, we have many years of customer service experience in industry and academia. Ideal-Logic serves clients in academia and business.

Our systems cover a lot of ground, from complex registration and scheduling to intellectual property. In some domains we are considered de-facto experts, and we are always expanding into new areas. We work with very large (40,000 users) and very small (200 users) clients, and they all receive the same high level of service. In all cases, we have resounding success stories - our approach is proven and effective.

**Damien Forkner** is the creator of the technology behind Ideal-Logic. He has an MS in Computer Science from Stanford University, and both a BS in Computer Science and a BA in Art History from Indiana University.

**Paul Bollmann** is a co-founder who interacts with nearly all of our existing and new clients on a regular basis. He holds a BA in Public Relations from Kansas State University.

**Adam Shields** is a developer with a background in logistics, business development, graphic design, and leadership. He has a BS in New Media Communications from Oregon State University.

**Cedar Dunn** directly supports and proactively communicates with our clients. She holds a BA in Communications from Portland State University.

**Gabriel Janzen** is a developer with a background in computer science and IT. Gabriel recently graduated from Oregon State University with a BS in Computer Science.

**Valerie Bloodsworth** provides support to and advocacy for our clients as a member of the Client Relations team. She holds a Master of Public Administration from The University of Akron.

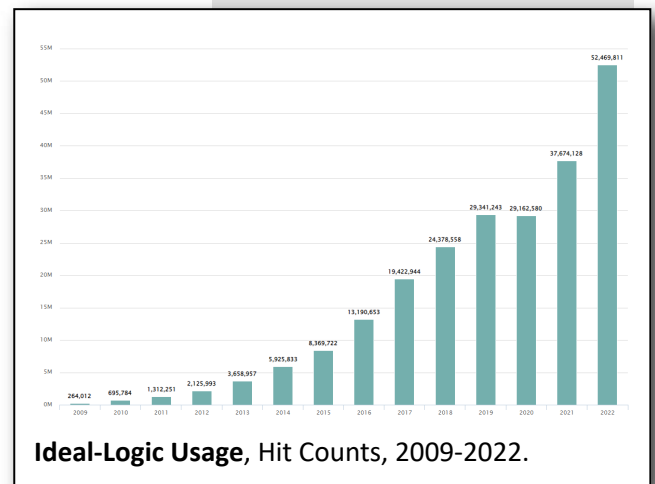
**Brittany Nefcy** is a developer with a background in higher education administration. She holds a BS in Sociology from University of Oregon and a MSE in Higher Education Administration from the University of Kansas.

## Ideal-Logic Values

**We serve the people who change the world with an awesome service.** We work behind the scenes to help our clients succeed. We do this by providing a custom software service that truly solves our clients' complex data and workflow problems. We free them up to focus on changing the world.

**We value the quality of our service over growth or profit.** We don't care what anybody else says. We're doing this the old fashioned way, by working hard and serving the very best way we know how. The clients that use our service are our responsibility and privilege to serve, and there's no other way to look at it.

**We are a company of influence through integrity, honesty, and excellence.** We simply strive to be the very best we can be in all aspects of our business and our relationships. When we mess up, we own up to it. When we don't know the answer, we say so. We focus on the things we can do well.



# About Our Service



Your processes are unique.  
Your software should be, too.

**You get a service, not a product.** *Software the way it was meant to be: it evolves with your organization and your needs.* This is the biggest advantage you get by using Ideal-Logic. In our experience, one-size-fits-all software products work well only in specific cases with a very well-defined problem set (e.g. MS Word). Real-world organizational software problems can be massively complex and intricate, and it takes time, energy, and perseverance (often with many wrong turns along the way) to truly solve them and realize the benefits. For many of our clients, we make hundreds or even thousands of changes over the first few years. Our entire business is oriented to provide this service and reach the end goal of a software solution that truly solves the problem.

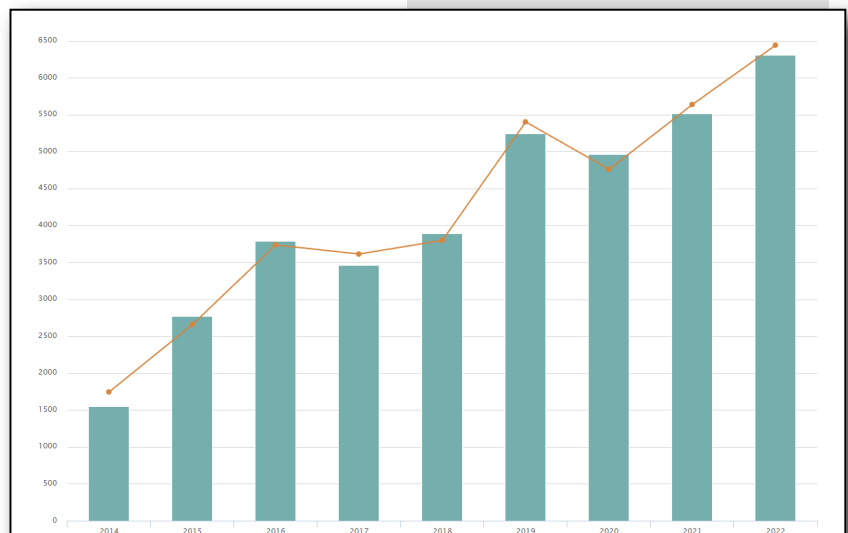
**It's about more than just the technology.** *Real-world experience really makes a difference.* Your organization and process are unique, but there's also no need to reinvent the wheel. We have found that the hardest part of automating processes for a business isn't always the technology (although that's hard); it's identifying and refining the best way of doing things. Our experience doing this for organizations across a variety of domains helps us (and you) get to the right answer as quickly as possible.

**You don't have to pay for individual changes.** *As many changes as you need for one low service price.* Pricing custom software is really hard. The problem is that software can't just be built and then abandoned. It needs to change - frequently. We often joke that our clients don't know what they really need until they have what they don't need in their hands. This is why we negotiate a clear service price up front, and we provide unlimited changes and fixes within the scope of the contract. With our service model, you can just call us and tell us what needs to be better, and we have the freedom to say "Great idea! We'll get to work on it."

## Response Times

In the last five years we have resolved over 23,000 requests from our customers, including new features, improvements, tweaks, and fixes. Of these 23,000 completed requests:

- 28% were resolved in less than 2 hours,
- 50% were resolved in less than 24 hours,
- 71% were resolved in less than 1 week, and
- 81% were resolved in less than 2 weeks, and
- only 19% required more than 2 weeks to resolve, generally because they were larger projects.



**Client Requests Completed.** This chart shows requests from our clients every year since 2011. The bars represent submitted requests and the line represents resolved requests.

# Company History

Ideal-Logic has been building and deploying custom web applications since its founding in 2008. Our development team has over 30 years of combined experience building and supporting complex workflow and data management systems across a wide range of industries and institutions. Most of our work has been with colleges and universities, but we also do a fair amount of work for private industry. Here is a brief list of some of the different types of systems that we have deployed and continue to support:

- **Youth Safety systems**, including online program/activity/session registrations, tracking staff/volunteer requirements, automated email notifications, dashboards for admins/program directors, customized reporting. Examples include Oregon State, Iowa State, New York University and Clemson Youth Safety Programs among others.
- **Recreation management and outdoor program systems**, including online activity and class registrations, pass sales, personal training, locker and towel rentals and reservations, trip planning, inventory management, sport club support, and equipment and gear rentals. Examples include Stanford Recreation, Oregon State's Faculty Staff Fitness and Club Sports programs, and various systems at Whitman College, Middlebury College, and University of Manitoba - Mini-U Program.
- **Children's program registration systems**, including online registration, scheduling, staff management and hiring, printable outputs such as name tags and special concerns lists. Examples include KidSpirit and Healthy Youth Program at OSU and CEISMC at Georgia Tech.
- **Trip planning systems** for university outdoor adventure programs, including online registration and travel planning, risk management, and reporting. Examples include the Adventure Leadership Institute at OSU and similar programs at Stanford, Colorado College, Whitman College, and Middlebury College.
- **Curriculum tracking systems** to track student progress towards certificates or levels in academic programs. Examples include the Oregon Master Naturalist program, Oregon Parenting Educators Collaborative at OSU, and College of Engineering Leadership Program at OSU and other academic programs at Ohio State, Colorado College, and University of Oregon.
- **Scholarship and funding application systems** that provide online application, complex review processes, and award management. Examples include the Academic Dean's Office at Colorado College and numerous online registration systems with scholarship processes.
- **General registration systems** that provide complex registration scenarios and customizable pricing, discounts, and review processes. Examples include Conference Services, Faculty Staff Fitness, Professional and Continuing Education, Extension, and FCH/4-H at OSU, and similar systems at Colorado College, Whitman College, Middlebury College, University of Oregon, and elsewhere.
- A complete **vendor management and procurement and contracting system** for University of Oregon that generates contracts, registers vendors, organizes review processes and tracks all UO matters (e.g. procurements, purchase orders, etc...).
- **Student organization management and event planning** at OSU for Student Leadership and Involvement, CFSL, RecSports, and the Center for Civic Engagement. Includes event planning, travel planning, membership management, and service hour tracking.
- **Teaching and education tools** that make up the Braincandy platform, an online real-time student/professor interaction system at Arizona State.
- **Real-time judging and scoring systems** for cheerleading events in the United States, UK, and Ireland.
- **Training and learning management systems** for private industry companies.

Many of these systems are very different, but our unique platform and service approach allow improvements for one client to help everyone else. Our solutions have been proven to work across many domains. Many of our clients have been with us for years, and we continue to partner with them each year to improve, refine, and expand the capabilities of the systems they use. In the last five years, we have resolved over 23,000 requests for changes, improvements, new features, and fixes for our clients across all of our systems.



# Universities

This proposal is for Texas A&M University System and the following universities to use the Youth Safety & Compliance System:

- Texas A&M University
- Prairie View A&M University
- Texas A&M University-Commerce
- Tarleton State University
- West Texas A&M University
- Texas A&M University-Kingsville
- Texas A&M University-Corpus Christi
- Texas A&M International University
- Texas A&M University-Texarkana
- Texas A&M University-Central Texas
- Texas A&M University-San Antonio

**The expectation will be that one or two admins will be the point people for this system and will facilitate communication and feature requests between Ideal-Logic and these universities.**

**This proposal is specifically for one overall Youth Safety & Compliance System for all of these universities to report their minor programs. Each university will have a separate program registration form in this system to clearly separate the programming being reported. This will make it possible to provide access to the system to oversee a particular university and allow for per university reporting along with many other features.**

The following pages detail out many of the features and functionality of this system. The goal will be to have program registration forms specific to each university within this system. This will allow each university to see their specific information but also allow the overall Texas A&M University System the ability to have oversight over all groups including spreadsheets, reporting, and more.

# Overview



Ideal-Logic provides a custom software system to report all minor program activities/sessions in a centralized place where the information can be maintained and tracked by compliance staff. The system allows program directors and associated staff from across campus to log in and report their youth programs that involve minors. The reporting form is customized to collect information related to and in fulfillment of the protection of minors compliance policy at your university.

The system provides multiple methods for entering program staff, volunteers etc. for each program and their activities/sessions. Top-level admins are able to view a list of all staff/volunteers working with minors across activities/sessions and whether they are in compliance with the university requirements. A major advantage of this system is that staff/volunteers can work for multiple programs and their requirement completions carry over from one program to another, if applicable.

Program directors can log in and see each of their programs along with their staff/volunteers, activities/sessions they have reported, and other information related to compliance. The ability for program directors and admins to log into the system and see their compliance information will reduce the amount of requests asking for information.

Automatic email notifications are configured to notify program directors, staff/volunteers, and other individuals about specific activities/sessions that are not in compliance. These automatic notifications can be configured to go to other groups such as Environmental Health & Safety, Housing and Dining, and specific department contacts based on how questions have been answered in the form. Additionally, automatic notifications can be used to email programs annually about programming they need to report, post activity/session evaluations, and many other purposes. The goal is to reduce the amount of manual work by the top-level admins by using the power of the system to automate processes.

The system has the ability to support other groups or offices on campus that may need to know when and where activities/sessions are happening on-campus (or off-campus). Specialized dashboards can be created for Campus Safety, high level administrators, departments/colleges and others for the purpose of seeing the details of activities/sessions and who to contact in case of an emergency.

**The expectation will be that one or two admins will be the point people for this system and will facilitate communication and feature requests to Ideal-Logic.**

**Staff Compliance.** Example tracking list of individuals and their compliance across different groups.

Date	Activity	Name	Youth Compliance Training	Code of Conduct	Actions
Jun 15-19	Summer Camp Session 1 KipFIRST	Bollmann, Paul	Not Compliant Past Activity	Not Compliant Past Activity	Open Activity
Jun 22	Summer Camp Session 2 KipFIRST	Bollmann, Paul	Not Compliant Past Activity	Not Compliant Past Activity	Open Activity
Jun 15-19	Summer Camp Session 1 KipFIRST	Atwood, Katie	Compliant Never Expires	Compliant Never Expires	Open Activity
Jun 22	Summer Camp Session 2 KipFIRST	Atwood, Katie	Compliant Never Expires	Compliant Never Expires	Open Activity

**Program Compliance.** Example list of programs showing aggregate compliance.

Date(s)	Activity	Status	Actions
Sep 27, 2019	Fun Run KidZone	0/2	Details
Dec 6, 2019-Jun 26	Fun Run KidZone	0/1	Details
Jun 8-19	Summer Session 1 KidZone	2/3	Details
Jun 15-19	Summer Camp Session 1 KipFIRST	1/2	Details
Jun 15-26	Summer Session 1 KidZone	2/5	Details
Jun 22	Summer Camp Session 2 KipFIRST	1/2	Details
Nov 9-Dec 14, 2018	Gymnastics 1st-3rd Grade Adventure Camp	0/1	Details
Dec 4, 2018	Challenge Course KidZone	0/1	Details
May 20, 2019	Summer Camp Session 1 Adventure Camp	0/2	Details
Nov 15, 2019-Jun 26	Fun Run 5K KidZone	3/3	Details
Jul 18-31	4K Fun Run KidZone	1/2	Details
Oct 10	Archery KidZone	3/3	Details
Oct 3-Dec 11	Summer Session 1 KidZone (Ready to Submit)	4/6	Details Continue

# Features (1/2)

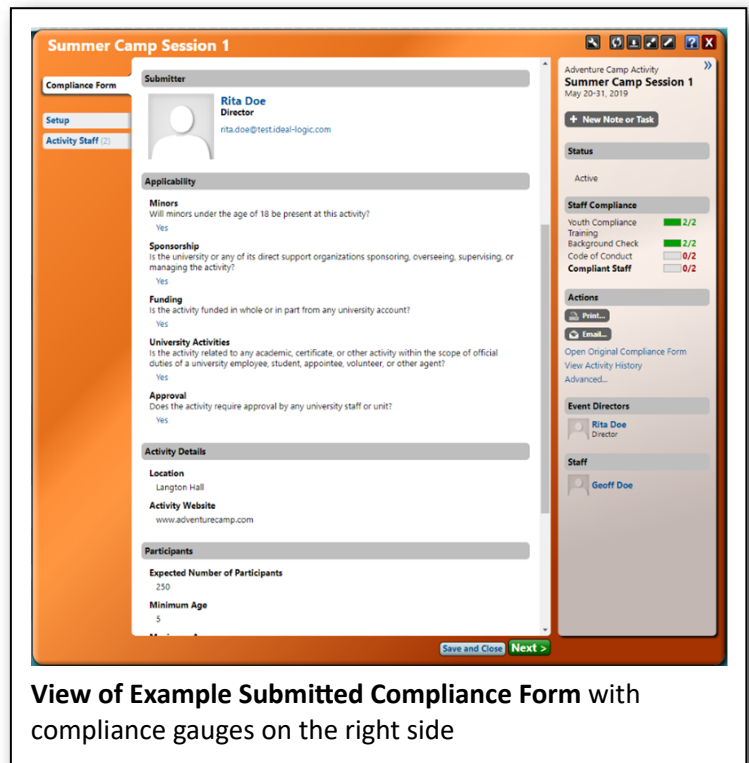
The Youth Safety System is designed for program directors and other designated staff to submit a program registration form reporting the information about schedule, staff/volunteer, and other important information about an activity/session involving minors.

## Administrator Features

- Main dashboards for top-level admins to see all programs, program staff, and other relevant details.
- Ability to create sub-offices underneath the main office that could have a dashboard to oversee specific programs assigned to them (e.g. 4-H, Student Affairs, Athletics, College of Education).
- Administrators have the option to email programs and directors directly from the system about compliance issues along with other matters.
- Auto email notifications can be configured to be sent to program directors and/or staff/volunteers notifying them of missing items.
- Customized reporting of the data collected in the system for the purposes of reporting to other groups on campus.

## Compliance Features

- A straightforward online reporting form customized to your policies for youth programs to use to report all activities, sessions, events, camps and other youth programs on or off campus.
- Review and approval processes customized to your policies.
- Logging of all program staff and volunteers that will work with minors and what compliance requirements they have met or not met.
- All staff compliance requirements are customized to the policies of the Youth Safety Office.
- Staff ratio calculation and reporting for compliance.
- Tracking of participant numbers across all programs.
- Ability for the system to host trainings which allows university and non-university people to take the training in one system
- Background check data can be maintained and tracked within the system knowing who has a Pending, Cleared, or Not Cleared check.
- The system can be used to collect consent/waivers from staff/volunteers to fulfill requirements.
- For all requirements (e.g. Background Checks, Training, etc.) integration or spreadsheet upload options are available to maintain accurate records.

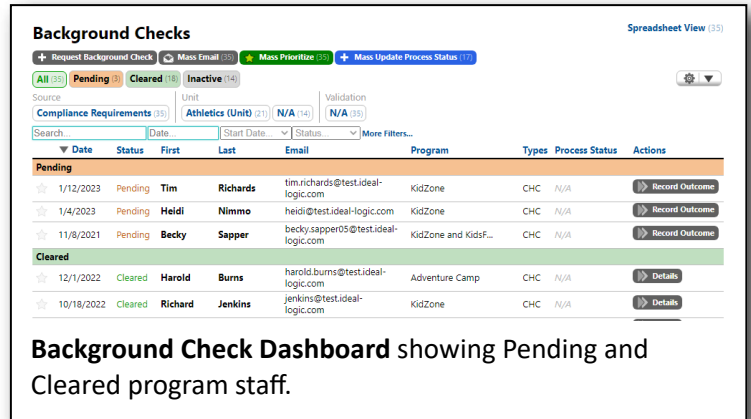


**View of Example Submitted Compliance Form with compliance gauges on the right side**

# Features (2/2)

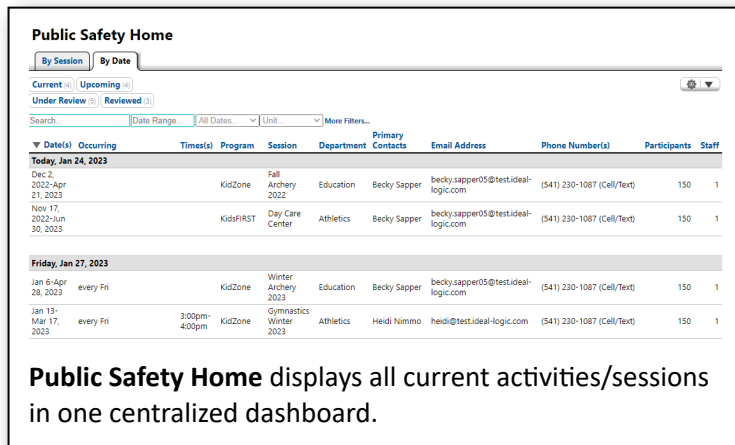
## Compliance Features Continued

- Activity/Session Dashboard for program directors to see all staff, activities/programs reported, and other information.
- Easy program reporting form with a helpful interface walking a user through the different fields they must complete in order to submit the form.
- Entry of program staff in the system using first name, last name and email address (can be connected to a LDAP server; may be additional fee) and/or use spreadsheet upload of users.
- Tracking of individual staff member’s background check information (pulled from outside the database; may be additional fee) along with other individual requirements such as trainings.
- Background check entered with a date will have an expiration date calculated automatically based on university policy.
- Each program can upload Excel spreadsheets of the minor participants that attended their program (first and last name, DOB, insurance (yes/no) and other info) into that specific activity/session (if required).
- Actual number of minor participants can be tracked and reported for each activity/session by entering this data into number fields.
- Watchlist feature allows high-level admins to have a separate list to monitor individuals that have exhibited red-flag behavior.
- Audit tracking of youth programs including site visits, self-assessments, and other methods of monitoring compliance.



## Other Campus Stakeholders

- Specialized dashboards for HR, Campus Safety, and other groups can be configured to assist in viewing staff data along with background checks and event information..
- Ability to involve other campus entities in review process (if appropriate).



# Integrations

## Required Integrations

A **Single Sign On** integration is required. This is easy to set up. See Page 26: *Single Sign-On* for more details.

A **directory integration** is suggested (and should be required) in order to make this system work. Program directors/leaders generally need to be able to log in and then provide a list of the staff/volunteers participating in their programs. This means that the person needs to be able to type a name and/or email address and get back a list of possible matches and *select* the correct person from your campus directory, instead of having to manually type in a first name, last name, and email address.

A directory integration is usually accomplished by giving Ideal-Logic access to query an **LDAP server** on campus. This integration allows Ideal-Logic to send a search query, like "john doe," or "john.doe@example.com" to the LDAP server and get a list of possible matches back.

## Training Integration

Usually, we want to be able to track which volunteers have completed one or more training courses in order to be compliant with policies before working with minors. There are a few ways to accomplish this:

- The simplest approach is to host the training directly in Ideal-Logic. We can host any SCORM-compliant training package. This way completion can be tracked automatically, volunteers and end users do not need another login, and no integration project is required.
- Ideal-Logic can also be used as a fairly function learning management system, and content can be built directly into the Ideal-Logic system. This content can include text, videos, and quizzes. This may be a good solution if you do not have a SCORM file and you are developing your training from scratch.
- Ideal-Logic can also be used to pull completion data from an external system. Connectors for pulling data from Canvas and Bridge are already built and can be easily configured for use. Connecting with other systems will require a custom integration project.

## Background Check Integration

In most cases, we want Ideal-Logic to be able to automatically initiate new background checks and retrieve the results of these checks automatically. These integrations are critical, but they can also be the trickiest. There are many different background check providers, and processes vary from provider to provider and from university to university. Here are some options:

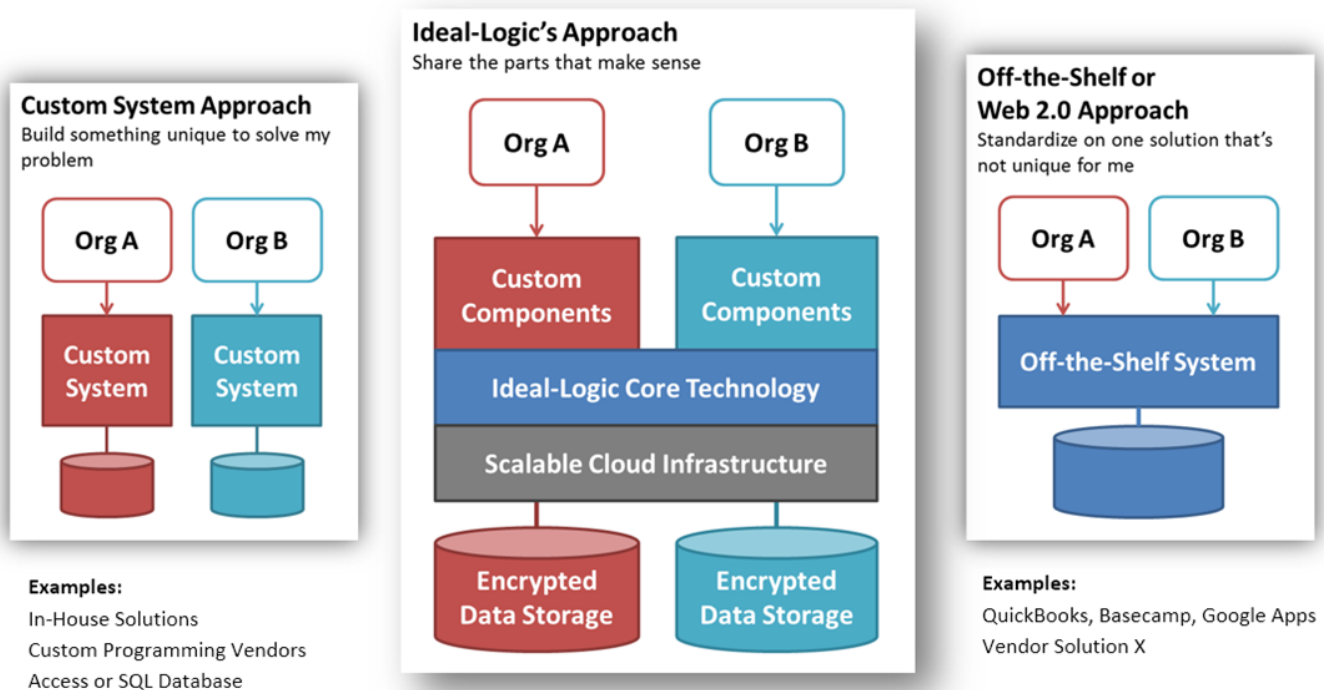
- We have already built connections with several providers, including Hire Right, Sterling, GHRR, and CoreScreening. If you are using one of these providers, we may be able to get you up and running quickly.
- We have also built custom connections with other universities who prefer to manage the connection to the background check provider directly. We send a request for a new background check to the university's API endpoint, and we get the results back (via the university). This is sometimes required if background checks need to be aggregated from multiple sources or are split with the HR department.
- We can also host management of background checks directly in Ideal-Logic. HR (or other personnel) who need to launch background checks can be notified (or log in and see a report) and then log results directly back into Ideal-Logic. This is a very flexible solution that sometimes works as a starting point while working out a more automated integration.

**Other Integrations.** Ideal-Logic is capable of sending and/or receiving data from many other systems and sources. Please see Page 17: *Data Access and APIs* for more details.

# Ideal-Logic's Approach

Our technology and our company are designed from the ground up to solve complex data management and workflow problems. Ideal-Logic's unique approach provides a full custom solution with none of the headaches and a much lower cost.

Ideal-Logic custom applications are provided as a web-based service. No infrastructure, hosting, or I.T. support is required – only a web browser and internet connection. Security, data backup, and a reliable, redundant infrastructure are all provided as part of the service. Intuitive design, a fast and responsive user interface, and the ability to handle almost any level of complexity make Ideal-Logic applications truly useful to our clients.



	Custom System Approach	Ideal-Logic's Approach	Off-the-Shelf or Web 2.0 Approach
<b>Good fit/good solution</b>	Yes, if well designed	<b>Guaranteed</b> as part of the purchase price	Rarely the best fit
<b>Reliability/bug rate</b>	Generally poor due to low testing	<b>Good</b> because most components are well tested	Good if you choose a good vendor with lots of users
<b>Flexibility to change</b>	Good if you have the original programmer(s)	<b>Excellent</b> and included in the price	Not likely
<b>Development costs</b>	Extremely high	<b>Low</b> (only implement the custom parts)	Very Low (spread over lots of customers)
<b>Maintenance costs</b>	High	<b>Fixed</b>	Low except upgrades
<b>Infrastructure costs</b>	High – servers, system admins, and I.T.	<b>None</b>	Varies
<b>Support costs</b>	Low if well-designed	<b>Low</b> and decreasing with ongoing improvements	Varies depending on quality and fit for the problem

Approach: Ideal-Logic's Approach

# Platform Overview

Ideal-Logic custom applications are provided as a web-based service. No infrastructure, hosting, or I.T. support is required – only a web browser and internet connection. Security, data backup, and a reliable, redundant infrastructure are all provided as part of the service. Intuitive design, a fast and responsive user interface, and the ability to handle almost any level of complexity make Ideal-Logic applications truly useful to our clients.

**Our software platform works for you.** *Complex, everyday work software that doesn't slow you down.* We've built our entire company and invested considerable resources and talent to develop the Ideal-Logic platform that is behind all of our applications. This unique technology allows us to build applications very, very quickly and with a very low error rate. Our platform allow us to grow, change, support, and evolve custom applications as efficiently and affordably as humanly possible.

**I.T. involvement is optional.** *Help, support, changes, and new features are only a phone call away.* If your experience is anything like ours, your I.T. department is probably overwhelmed. There just aren't enough resources to go around to meet the need for good software solutions. Nearly all of our client organizations work with us directly, without the need for any I.T. intermediary or resources (most with their I.T. department's blessing, of course). We handle security, backup, servers, and provide everything required for a complete solution. All you need is a web browser.

## Specifications

- Fully hosted solution. Server farm co-located at PEAK Internet in Corvallis, Oregon.
- Platform fully owned by Ideal-Logic.
- Unique web interface only updates what's changed on a page.
- Fully-functional windowing interface designed to get real-world work done.
- Redundant firewalls, servers, networking, and databases.
- Multiple power and network providers, battery backups, generators.
- Real-time offsite backups.
- Encryption of all data any time it touches a disk or network wire.
- Fully memory-resident database executing >20K queries per click.
- Technologies: C, Perl, Javascript, AJAX, HTML5, Ubuntu Server.

## System Uptime

Our system is designed to be completely redundant and resilient, and our goal is 100% uptime. We never have scheduled downtimes.

Year	Uptime
2009	99.971%
2010	99.827%
2011	99.899%
2012	99.969%
2013	99.860%
2014	99.926%
2015	99.960%
2016	99.926%
2017	99.988%
2018	99.973%
2019	99.961%
2020	99.979%
2021	99.850%
2022	99.954%

## Approach, Methodology, and Technology

# Hosted Service

Ideal-Logic hosts its own system on its own servers.

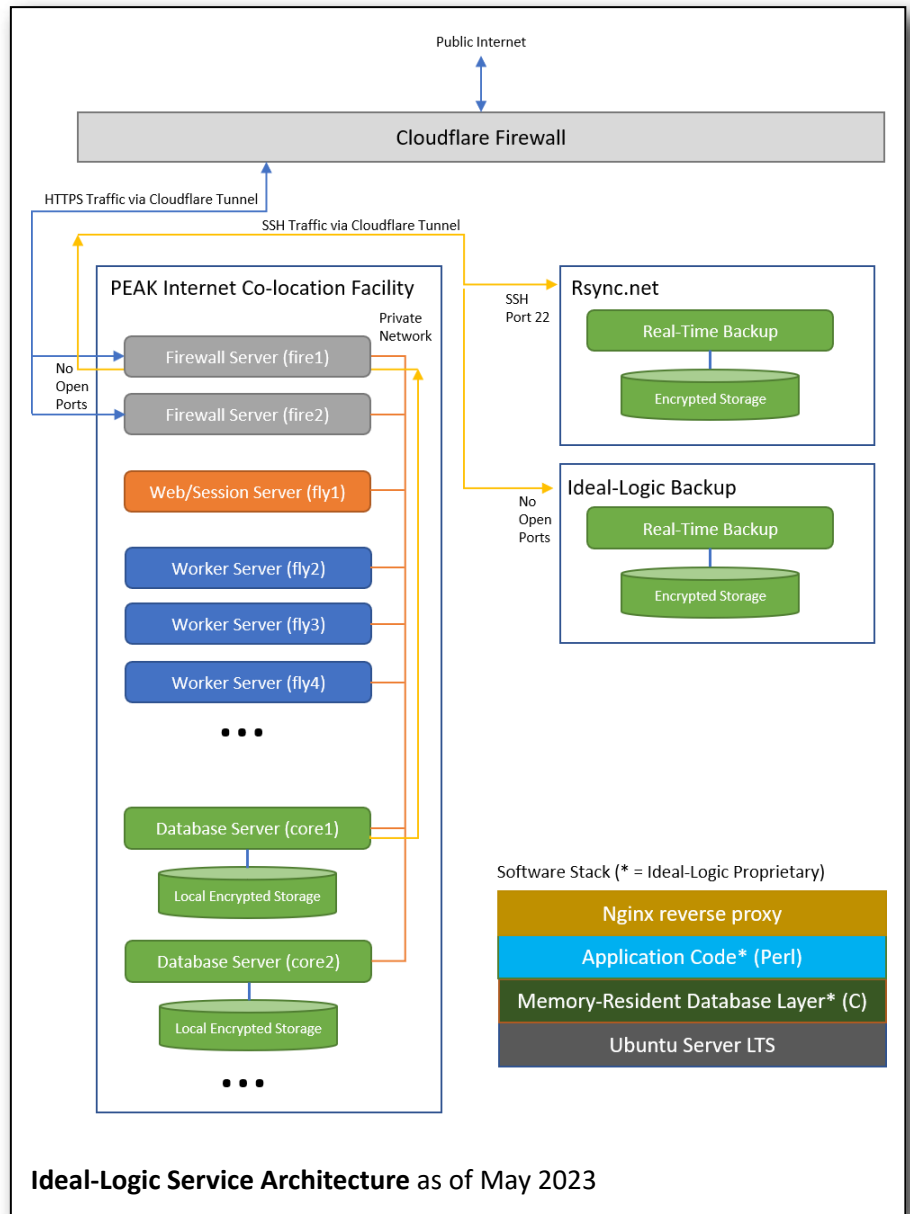
**Ideal-Logic Server Farm.** Our servers are co-located at PEAK Internet in Corvallis, Oregon. PEAK provides 24x7 physical security, redundant power and cooling systems, and multiple peered connections to Internet backbone providers.

**Server Security.** Ideal-Logic uses a hardened Ubuntu Server operating system for its servers. Ideal-Logic processes maintain these servers with current security patches and code updates. Our servers are protected by multiple redundant firewalls, and each server also functions as its own firewall. Industry-standard techniques to secure, patch, and maintain these servers are followed at all times.

**Cloudflare.** Ideal-Logic uses Cloudflare to protect all of its applications and servers. Our servers have no open ports on the Internet. This unique configuration protects our data in ways that were not even imaginable a few years ago.

**Encryption.** Data is encrypted as it is entered into the system, and it is always encrypted whenever it touches a network or a disk for storage.

**Offsite Backups.** Encrypted backup data is sent in real-time to two geographically diverse locations.





# Approach, Methodology, and Technology Platform Features

Ideal-Logic's proprietary software platform provides the foundation for all of our development. It is designed from the ground up to support our rapid development and deployment model. It provides:

**A Flexible In-Memory Database.** This unique piece of software provides the foundation of our platform and is capable of processing the >20K queries per click required to support our complex applications.

**Advanced Data Modeling.** Our platform is designed to allow us to model the real-world solutions our clients need in a way that makes sense to people.

**Access Control.** Every page that every user sees in our system is custom-drawn for that user. This fine-grained access control is built into the platform.

**User Interfaces.** Ideal-Logic uses a standard suite of user interfaces that are continuously being improved and evolved in response to usage and feedback. A consistent, intuitive user interface is a key part of our service.

**Windowing System.** Ideal-Logic's platform provides a fully-functional windowing system that makes it possible for administrators to open multiple lists or data items simultaneously, lay them out next to each other, and quickly switch back and forth between tasks. This critical feature makes it possible to use the system for real work every day *much more efficiently* than a standard web-based system.

**Scalability.** Our platform allows us to grow an application in many directions—scaling up to more users, more layers or groups of users, adding new features and functionality, expanding simple processes into more complex ones, interact with external systems. In other words, it allows us to grow in all of the ways we need to grow to solve complex, real-world problems.

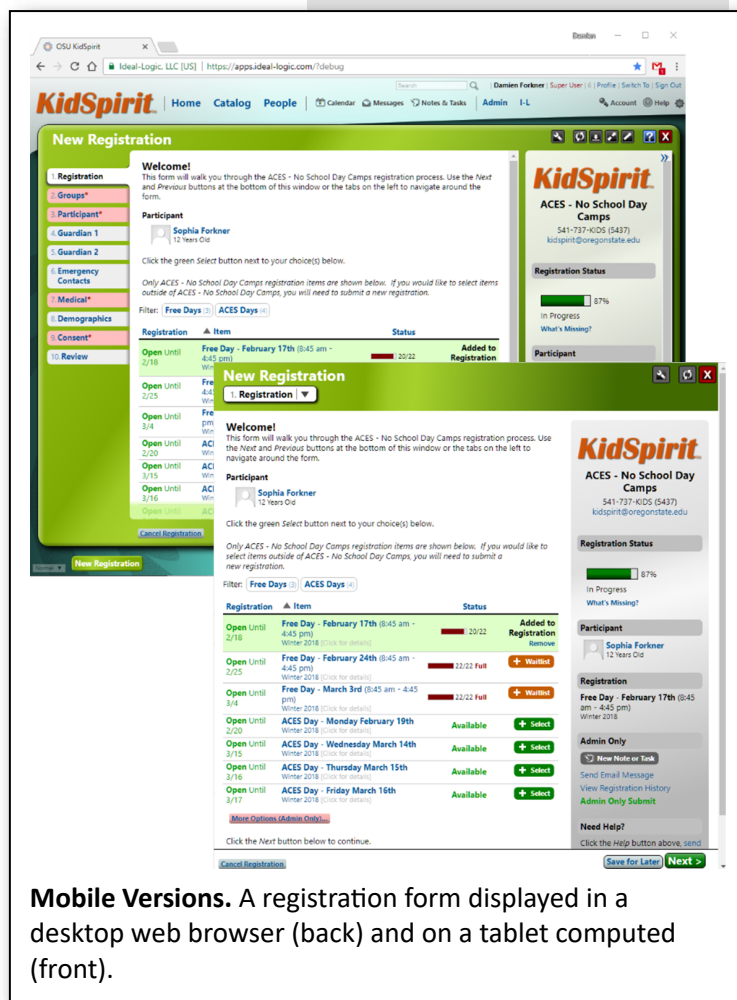
**Web Browser Support.** Ideal-Logic's system is accessible to any modern web browser. See a specific list at right of versions supported.

**Mobile Device Support.** Our system automatically scales to a touchscreen- and mobile-friendly interface appropriate to the device. In the case of a tablet or phone, the system converts the viewpoint into a "one-page-at-a-time" model by default that maximizes screen space and touchscreen usability.

## Browser Support

Ideal-Logic's system is accessible via any modern web browser, desktop or mobile. Here are some specifics:

- Google Chrome (version 21+)
- Apple Safari (version 7+)
- Mobile Safari (version 7+)
- Mozilla Firefox (version 27+)
- Microsoft Edge (all versions)
- Internet Explorer (version 11+)
- Opera (version 12.18+)
- Android (version 4+)



**Mobile Versions.** A registration form displayed in a desktop web browser (back) and on a tablet computed (front).

# Redundancy and Availability



## System Uptime

Our system is designed to be completely redundant and resilient, and our goal is 100% uptime. We never have scheduled downtimes.

### Year Uptime

2009	99.971%
2010	99.827%
2011	99.899%
2012	99.969%
2013	99.860%
2014	99.926%
2015	99.960%
2016	99.926%
2017	99.988%
2018	99.973%
2019	99.961%
2020	99.979%
2021	99.850%
2022	99.954%

Ideal-Logic’s hardware and software platform is fully redundant at every level. It was designed from the group up to require no scheduled downtimes or maintenance outages. A great example of this occurred in 2013, when we spent a week moving our entire production system to a new hosting provider with zero downtime.

**Maintenance Outages.** Ideal-Logic’s system never has any planned downtimes or maintenance outages. It is designed to avoid these entirely.

**Unexpected Downtime.** When unexpected downtime has occurred in the past (usually a result of Internet issues, power loss and generator failure, or human error):

- Ideal-Logic staff are immediately notified by automated text message and emails sent by multiple “canaries” that are watching our service at all times.
- Our priority is always to restore the service as quickly as possible.
- We maintain a Twitter account to provide out-of-band communication of any downtime more than a few minutes in duration.
- We notify affected clients via phone or email as soon as service is restored.
- If requested, we can provide forensic analysis of any outage to clients.

**Service Level Agreement.** Ideal-Logic does not provide service level agreements (SLAs) by default, but they can be negotiated if desired. Please see our uptime history at right.

**Corporate Commitment.** Ideal-Logic’s business depends on system uptime and availability. We constantly strive to improve in this area and reach our goal of 100% uptime.

**Backup Frequency and Data Loss.** Ideal-Logic has never lost any data. Ideal-Logic has multiple offsite servers providing real-time backups of database transactions within seconds of their occurrence. Even in the event of a disaster that destroyed our server farm, we would not expect to lose any data. In case this real-time mechanism fails for any reason, we use an independent mechanism to run nightly incremental backups of our database. Backups are monitored daily and tested several times per year.

**Ransomware Protection.** We use ZFS to create immutable snapshots of backup data that cannot be overwritten or encrypted in a ransomware attack. In addition to all of the other protective measures, this provides peace of mind for our data.

**Disaster Recovery.** Ideal-Logic maintains disaster recovery plans for several worst-case scenarios. In the worst case, we expect to have the service back up and running within 24 hours from real-time offsite backups using cloud servers. We maintain Amazon AWS servers for this purpose that are ready to take over in a disaster.

# Data Access and APIs

All data entered into Ideal-Logic's system is owned by the client. We consider good data access to be critical to providing a good solution to real-world problems. Additionally, our experience has taught us that integration with other systems is difficult. Here is how we approach this problem:

- **Spreadsheet Download.** Any data table in the system can be customized with additional columns, filtered, sorted, and downloaded as a CSV file (opens in Excel) with a single click.

- **Custom Reports.** Any customized data table can be stored as a custom report, named, and shared with other users.

- **Reporting Spreadsheets.** Ideal-Logic provides large spreadsheet views of many data items in the system that are accessible to higher-level administrators. These spreadsheets are pre-built to include many common data fields and also include custom data fields created by users.

- **Batch File Downloads.** Many places in the system provide batch file download options that produce ZIP files of uploaded file attachments, images, profile photos, etc.

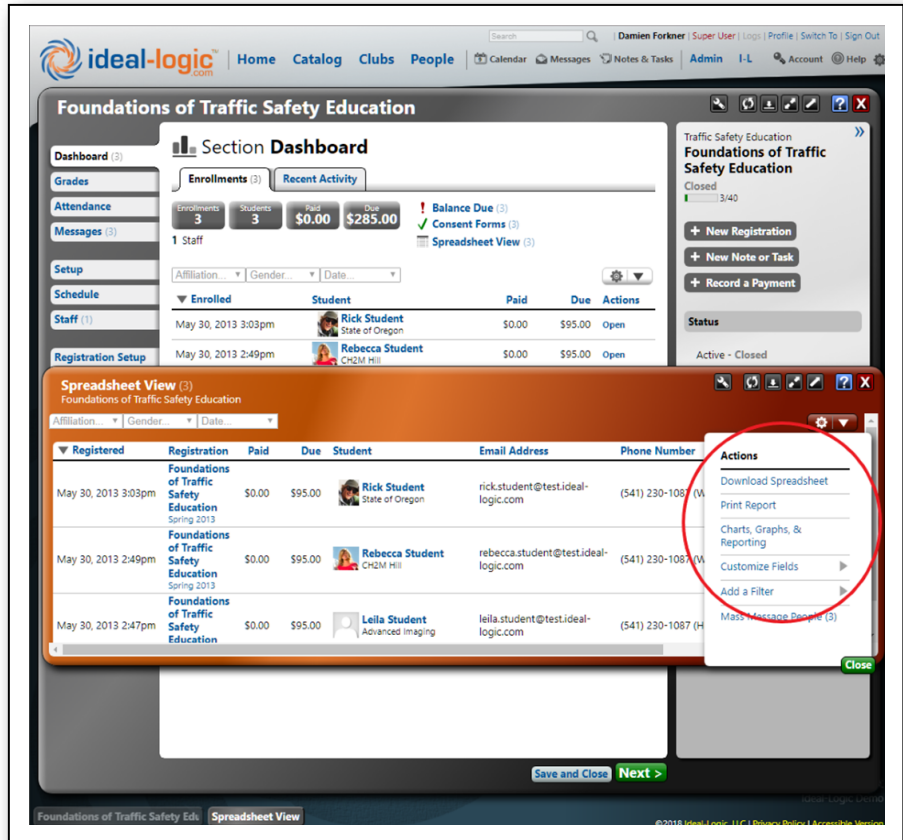
- **Batch Printed Documents.**

Most documents in the system can be printed via batch printing mechanisms. We work with our clients to design paper outputs for archival and retention purposes (e.g. signed consent forms).

- **API Access.** Ideal-Logic's industry-standard REST API provides access to many data fields by any programmer (access controlled and encrypted, of course). As part of our custom service, we can easily configure additional REST API endpoints to retrieve additional data from the system. For more details, see the "API" section later in this document. This access is included in the service price.

- **Programmer Support and Custom Integrations.** Ideal-Logic has the development resources to interact with nearly any outside system. We have configured integrations with many systems at many different universities, including Banner and Canvas, using custom integration code. These integration options are available for an additional charge.

- **XML/JSON Data Dump.** As part of our Terms of Service, we provide a "break-glass" option to request a full dump of all account data via JSON or XML. Contact us to initiate this transfer at any time.



The screenshot shows the Ideal-Logic system interface. The main dashboard displays a 'Section Dashboard' for 'Foundations of Traffic Safety Education' with a table of enrolled students and their payment status. A 'Spreadsheet View' window is open, showing a detailed table of registered students. The table has columns for 'Registered', 'Registration', 'Paid', 'Due', 'Student', 'Email Address', and 'Phone Number'. A red circle highlights the 'Actions' menu in the spreadsheet view, which includes options like 'Download Spreadsheet', 'Print Report', 'Charts, Graphs, & Reporting', 'Customize Fields', and 'Add a Filter'.

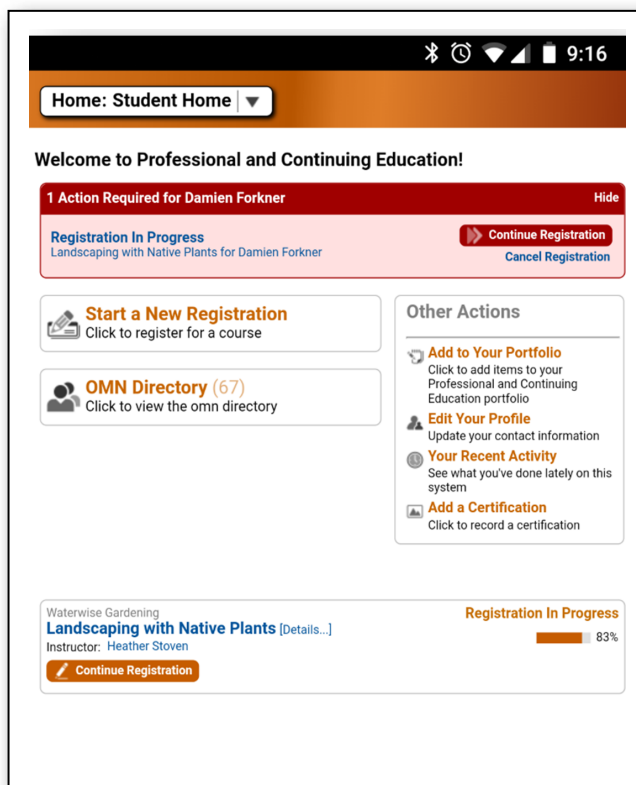
Registered	Registration	Paid	Due	Student	Email Address	Phone Number	Actions
May 30, 2013 3:03pm	Foundations of Traffic Safety Education Spring 2013	\$0.00	\$95.00	Rick Student State of Oregon	rick.student@testideal-logic.com	(541) 230-1087 (M)	Download Spreadsheet Print Report Charts, Graphs, & Reporting Customize Fields Add a Filter Messages (3)
May 30, 2013 2:49pm	Foundations of Traffic Safety Education Spring 2013	\$0.00	\$95.00	Rebecca Student CH2M Hill	rebecca.student@testideal-logic.com	(541) 230-1087 (M)	
May 30, 2013 2:47pm	Foundations of Traffic Safety Education	\$0.00	\$95.00	Leila Student Advanced Imaging	leila.student@testideal-logic.com	(541) 230-1087 (H)	

# Mobile User Interface

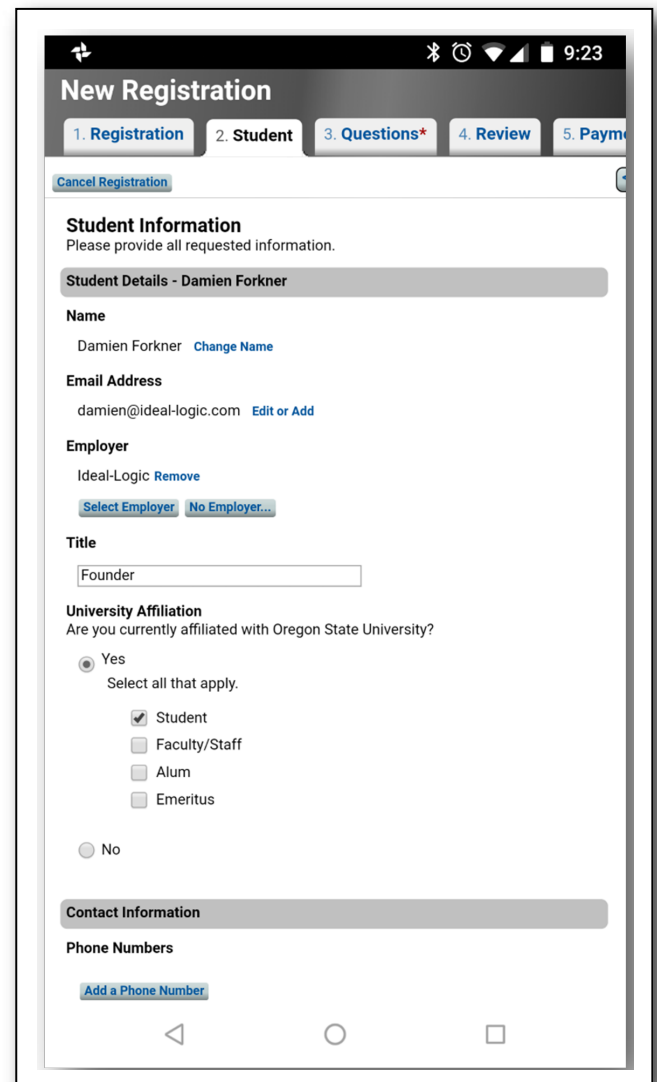
Ideal-Logic’s entire system is available for use on any modern mobile device. When it detects a mobile device, the system converts into a mobile-friendly mode with a simplified user interface.

- **Fully Functional.** Ideal-Logic’s mobile interface is 100% functionally equivalent to the desktop version. Rather than a windowing interface, the system displays one page at a time.
- **Installable Web App.** On Android and iPhone devices, the system prompts the user to install the system as an app link on the user’s Home Screen. When used in this mode, the user experience is similar to an installed native app.
- **Any Modern Device.** Any modern Android, iOS, or Windows Phone device will be able to run Ideal-Logic’s mobile web app.

Approach: Mobile User Interface



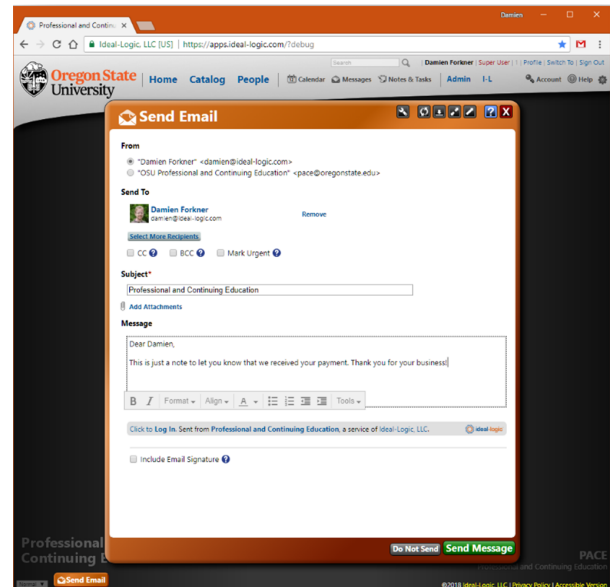
**Mobile User Interface.** Student Home Screen from OSU Professional and Continuing Education system (above) and registration form (right). Screenshots from an Android phone.



# Notifications (1/2)

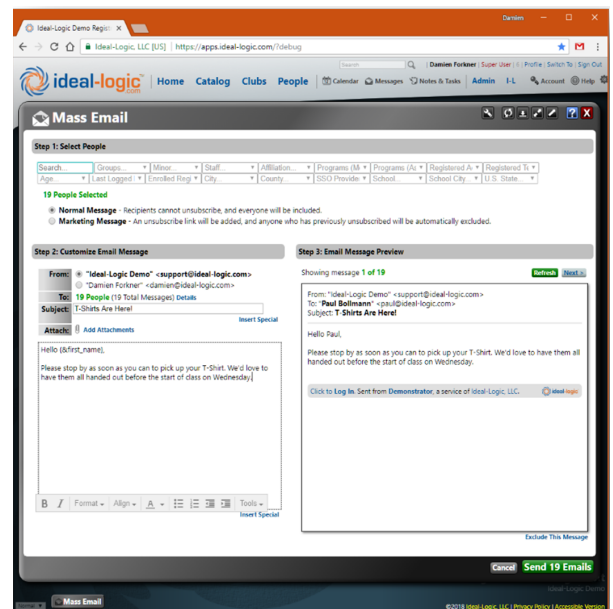
Ideal-Logic’s platform and processes support many different types of notifications. We work with our clients to implement the most appropriate type of notification for each need.

- **Rich Text Email Content.** All email messages sent from the system can include rich text content and formatting. They are sent as HTML messages that are readable by any modern email client. Many automatic notifications sent from the system (e.g. a Registration Confirmation message) are richly formatted and include images. Messages can include attached files or links to attached files.
- **Manual Individual Email Notifications with User Customization.** These can be triggered manually (for example, by opening a user’s profile and clicking “Send Email”) or as part of a process (for example, after clicking an “Approve” button to approve an application). The user interface allows the sender to customize the text of the message, attach files, add additional recipients or CCs, and choose to send the message or not.
- **Mass Emails to Groups.** Mass emails can be sent throughout the system to selected groups of people. Mass marketing messages automatically include Unsubscribe functionality. Mass email interface includes filtering and selection of recipients, customization of the message to be sent, and previews of each individual message.
- **Automated Process Notifications.** Email messages can be added to any process throughout the system or based on a schedule. In many cases, these messages have already been built and can simply be customized. In other cases, we can add notifications easily where they are required as part of our service.
- **Custom Notifications.** In many places, it is simple to set up completely custom notifications that are triggered by rules (for example, 7 days before registration closes, send an email message to people who have registrations in progress).
- **Digest Notifications.** For administrators, it is often preferable to receive digest notifications on a schedule (e.g. daily) rather than individual notifications. We provide a customizable mechanism to select which message types to include in the digest and configure a schedule to receive them.



## Manual Email Notification with Customization.

This version allows a customizable message to be sent to individual users.

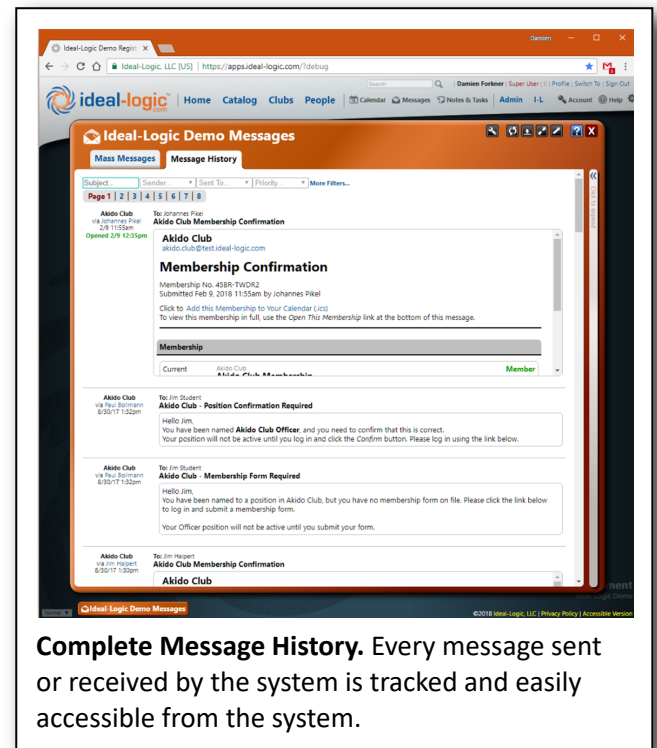


## Mass Email Notifications.

This interface allows filtering and selection of recipients, customization of the message, and previews of each individual message that will be sent.

# Notifications (2/2)

- **Individual Text Notifications.** The system can be used to send text messages in a similar fashion to the way that emails are sent. End users are required to enter their SMS messaging phone number and consent to receive text messages.
- **Group Text Notifications.** When text messaging is used, mass messages can be sent as a combination of emails and text messages for people who prefer to receive them one way or another.
- **Text Message Forwarding.** Using text messaging requires the assignment of a text messaging phone number as the sender for text messages. When people respond to these texts, the system can be configured to forward them to other text messaging phone numbers or email them to selected users.
- **Emailing Into the System/Email Forwarding.** The system can be configured to receive mail when it is appropriate to do so. This allows emails to be sent into the system, received, and automatically stored with the appropriate data item in the system. They can also be forwarded on to individuals or groups. This can be very useful for certain types of knowledge retention processes.
- **Read Message Tracking.** The system automatically adds a small tracking image to the bottom of messages sent. This allows the system to receive a notification when messages have been opened by the recipient. This is an imperfect tracking mechanism due to the limitations of email clients, but it can be helpful.
- **Message History.** A complete copy of every message sent or received by the system is automatically tracked and stored in the system. This message history is available throughout the system. For instance, you can open a person's profile and go to the Messages tab to see every message they have received, or you can open a registration and go to the Messages tab to see all notifications for that registration.
- **Messaging Security and Anti-Spam Technologies.** Ideal-Logic uses SPF, DKIM, and DMARC to send messages that are compliant with industry standards and prevent them from being discarded by spam filters. We have a good track record and high success in this area.
- **Outlook/Office 365 Compatibility.** All messages sent by the system are compatible with Outlook/Office 365. Integrated action links allow actions to be executed directly from emails using any email client.



**Complete Message History.** Every message sent or received by the system is tracked and easily accessible from the system.

# Branding

Ideal-Logic's system provides a flexible system of branding so that the system looks and feels as close to our clients' brands as possible.

- **Hierarchical Configuration.** Branding is defined at a high level for each entity we work with. This includes a logo and color scheme. It can be customized within a specific account and then further customized for individual departments and programs within an account. Most configuration related to branding (colors, logos, support phone numbers, email contacts) can be customized at all of these levels by administrators with appropriate permissions.
- **Special Considerations.** Within the technical limitations of our system, we are happy to work with our clients to further refine branding as part of our service. For the University of Oregon, for example, we built a custom header bar at the top of the system that includes standard UO links so the system fits more tightly into UO branding guidelines.



**Branding Examples.** System branding configurations for Stanford Recreation (back), University of Oregon Purchasing and Contracting Services (middle), and Oregon State Faculty Staff Fitness (front).

# Printing

Ideal-Logic's custom service includes the ability to print paper documents from the system as needed. Many paper documents are already built and ready to print from the system as needed.

**Paper Printing.** Clicking a Print button in the Ideal-Logic system opens a new tab in the web browser containing a paper-printable document.

**PDF Conversion.** A PDF option is usually also available to automatically convert the document to PDF format.

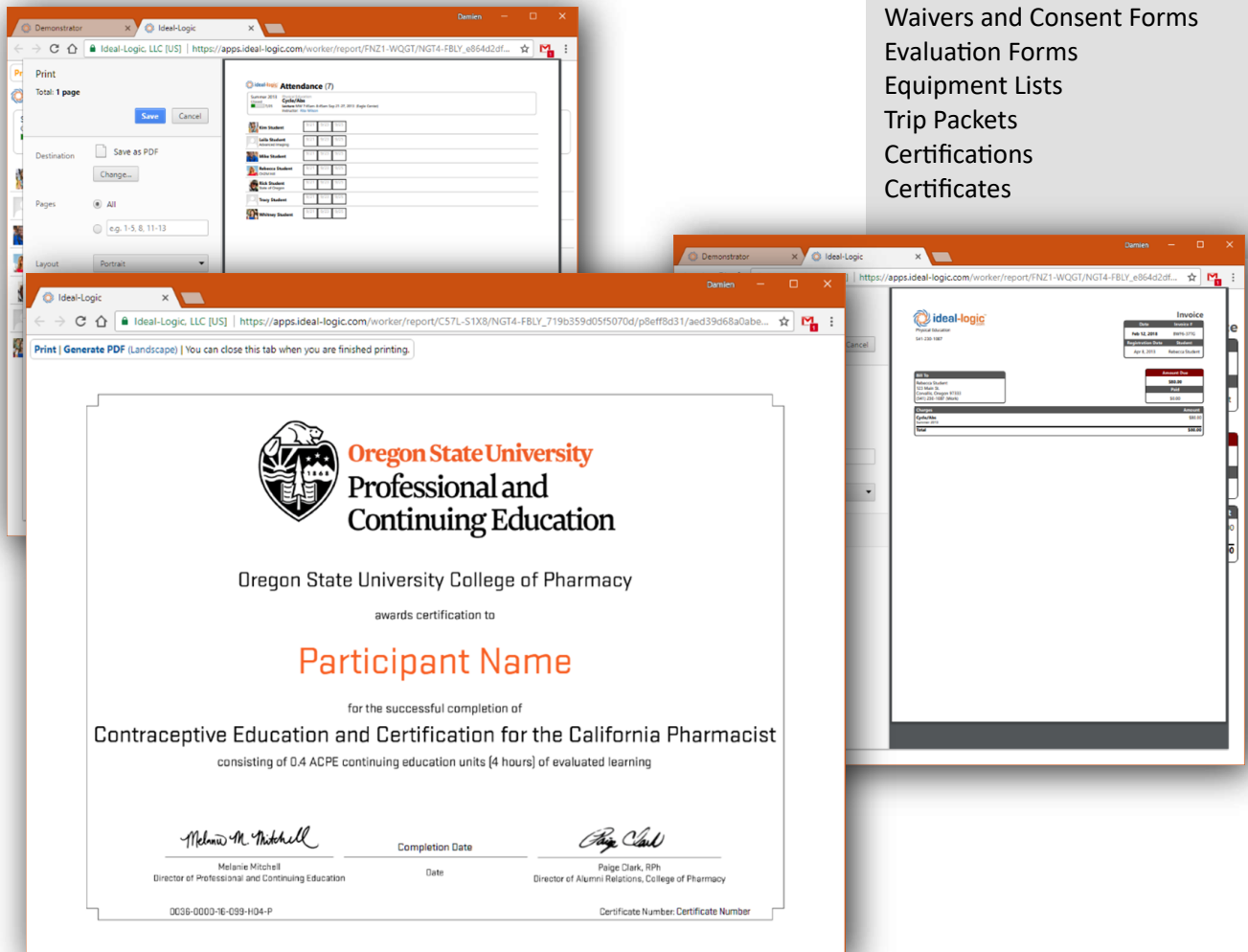
**Batch Printing.** When appropriate, we provide batch printing functions to allow an administrator to print a group of documents together (for example, all registration forms for a given course).

**HTML Printing Limitations.** Printing from a web browser is not always consistent across browsers and platforms. We design printed pages to fit compactly and place page breaks logically, but it is not always possible to get the same level of precision from web browser printing as you can with a word processor.

## Paper Document Examples

This is a partial list of paper documents that the system currently prints as part of its processes.

- Registration Confirmations
- Invoices
- Payment Receipts
- Registration Forms
- Name Tags (various sizes)
- Rosters
- Attendance Sheets
- Schedules
- Staff Schedules
- Special Concerns Lists (medical)
- Emergency Sheets
- Balance Due Lists
- Sign-In Sheets
- Waivers and Consent Forms
- Evaluation Forms
- Equipment Lists
- Trip Packets
- Certifications
- Certificates



Approach: Printing

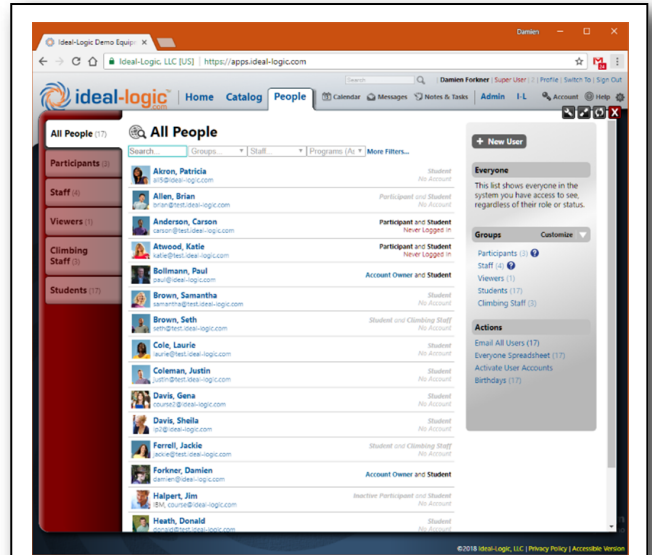


# Access Levels

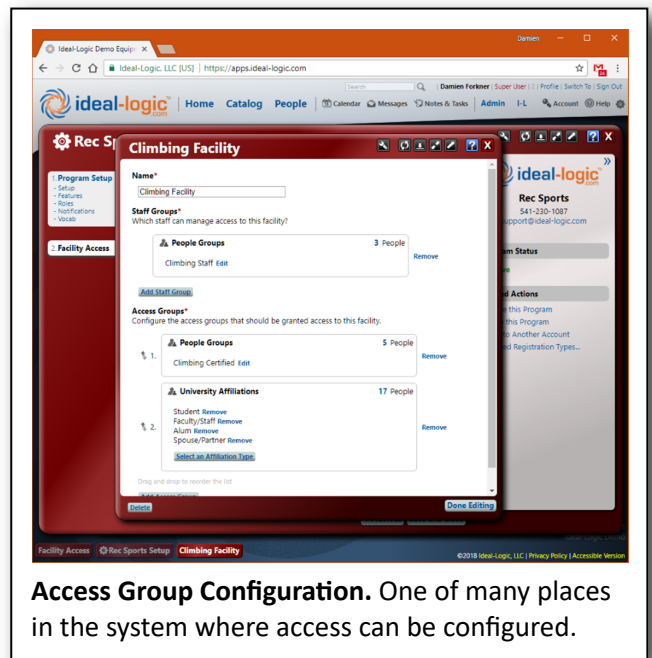


Ideal-Logic’s platform and applications are designed specifically to handle the complex access control required in order to properly model the needs of large, real-world organizations.

- Data-Based Access.** Many levels of access in the system are granted automatically based on a person being associated with a particular data item. For example, the person named as an instructor for a course will automatically become a member of the Staff access group and gain access to view that course’s list of enrollments, attendance sheets, rosters, etc.
- Group-Based Access.** Some global access levels in the system are granted manually by an administrator. For example, the Student Leadership and Involvement organization at OSU grants access to a handful of Campus Security staff who log in to the system to view some specific student organization data. These people are explicitly named by administrators.
- Custom Access Groups.** We believe the best way to simplify access control is to use the right language. This is why we have built a complete customization layer for naming related to access levels. We always use our client’s exact terminology to describe access roles (for example, KidSpirit names “Counselors” and “Head Instructors” that have the right level of access automatically).
- Hierarchical Structure.** Administrative access in general in the system is organized hierarchically. For example, administrators may be named at the top level and have access to administrative functions across the system. Administrators may also be named for a particular department and will gain access to that department and its sub-units. Instructors and trainers gain access to their courses and students.
- Flexibility.** As part of our custom service, any access level may be tweaked, customized, or modified. Our goal is always that the service we provide fit your process, not the other way around.
- No Limitations.** There are no limitations to the number of administrators or users at any level in the system.



**People Menu.** Shows user accounts in the system and the various access levels associated with each person.



**Access Group Configuration.** One of many places in the system where access can be configured.

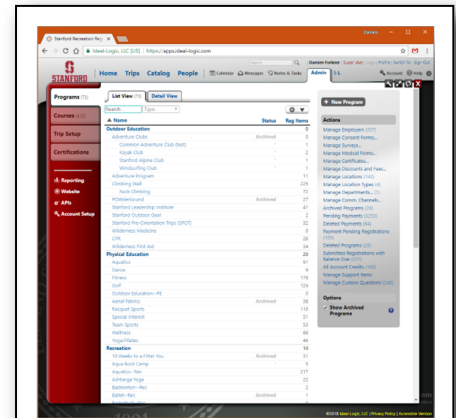
# Program Hierarchy



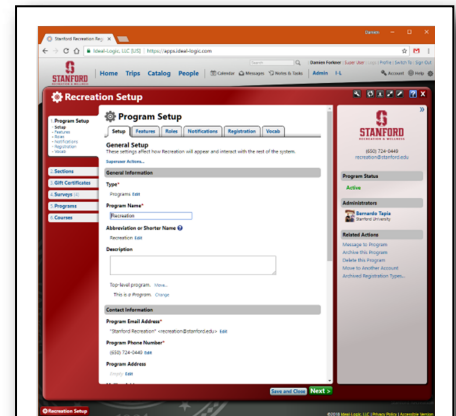
The ability for each administrative unit to have its own “space” in the system is one of Ideal-Logic’s greatest strengths. We provide a hierarchical configuration of program, department, and administrative units. This hierarchy provides many benefits:

- **Branding.** Each program can have its own branding. Logos, colors, phone numbers, support email addresses, help contacts, and many other settings can be customized for that department’s use.
- **Form and Process Customization.** Programs can set up defaults for various forms and processes that are unique to that program. Each program can have its own registration questions, discounts, review processes, and many other functions.
- **Administrative Access.** Administrative staff can be named with each program and only gain access to that program’s data. This significantly reduces the risk of many kinds of errors and problems (either accidental or intentional).
- **Dashboards.** Each program has its own administrative dashboard automatically built based on the features, processes, and tools the program is using.
- **Participant Tracking.** Individual participants may interact with one or more individual programs within the same system. Ideal-Logic’s system allows this participation to be tracked independently for each program and also aggregated across the entire system. As participants become associated with more programs, they may gain more access or have new features appear on their Participant Home screen.
- **Reporting.** Reports can be created easily across the entire system or for specific programs or groups of programs.

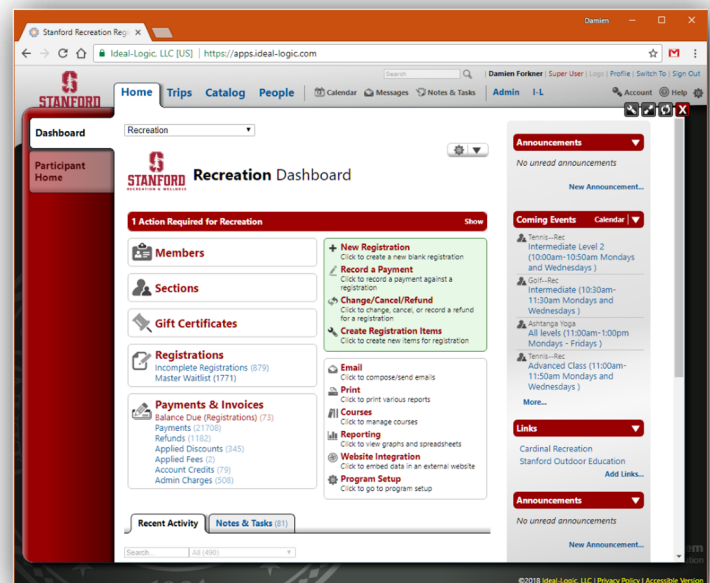
**Program Dashboard (right).** Provides a custom administrative viewpoint for administrators in each program.



**Hierarchy of Departments.** Configure a separate space for each group.



**Program Setup.** Configure and customize per-program.



# Online Consent and Digital Signatures

Many Ideal-Logic processes involve collecting consent or signatures for online waiver forms. This document details our approach to this problem.

## Overview

1. **Authentication.** This means establishing that a uniquely identified individual is present. The stronger the authentication scheme, the stronger the confidence that the right individual is indicating consent.
2. **Affirmation.** This means establishing that the authenticated user took action that required intent. In this case, we want to be sure that the user intended to agree to your waiver. The system must provide sufficient logging and record of specific user actions to provide a complete audit trail.

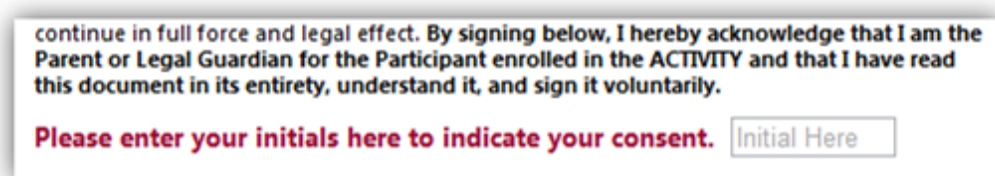
## Authentication Techniques

Ideal-Logic systems are generally accessed by users using an email address as a unique identifier and a password known only to that user. Passwords are internally protected using secure hashing algorithms, encryption, and timeouts. Ideal-Logic’s password selection screen shows users a visual representation of the strength of their password, to encourage users to select strong passwords.

Ideal-Logic provides custom support for stronger authentication measures, including custom password strength rules, timeouts, and security questions for password resets. For maximum security, Ideal-Logic can support two-factor authentication using key files or other secure techniques. Most of our clients using online waivers choose to at least implement security questions for additional security.

## Affirmation Techniques

A typical online waiver in an Ideal-Logic system asks the user to review the text of the waiver and then enter their initials to indicate their consent. This approach ensures that the user intended to agree with the text provided in the statement.



The Ideal-Logic system automatically tracks a complete history of every action performed by every user. System logs also track system access, password resets, and other relevant details. Logs and histories are encrypted, stored securely within our database, and are not available for tampering. Using these mechanisms, the Ideal-Logic system provides a secure, complete audit trail sufficient to establish affirmation.

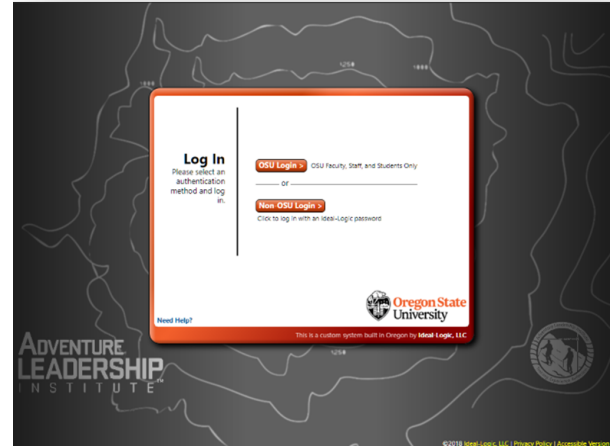
# Single Sign-On

Ideal-Logic authentication processes can be integrated with most single sign-on (SSO) environments of the following types:

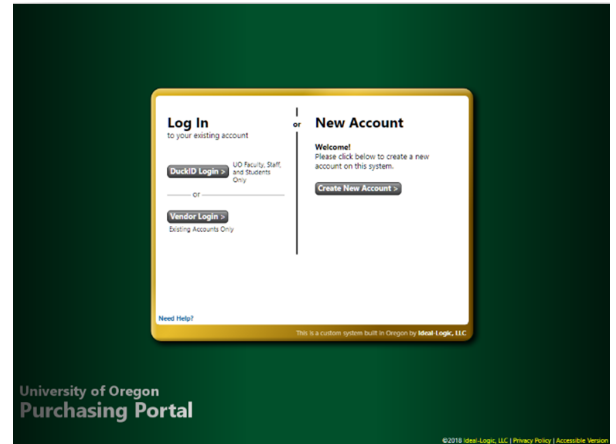
- Security Assertion Markup Language (SAML/Shibboleth).** Ideal-Logic systems can integrate quickly and easily with a SAML environment. Contact and assistance of your IT department will be required in order to enable the connection.
- Central Authentication Service (CAS).** Integration with a CAS environment is straightforward. Contact and assistance of your IT department will be required in order to enable the connection.
- Microsoft Active Directory (AD).** Ideal-Logic can integrate with SSO provided by Microsoft's ActiveDirectory server by configuring the ActiveDirectory server to allow SAML authentication. Contact and assistance of your IT department will be required in order to enable the connection.
- Social Networking Providers (Google, Facebook, Yahoo!, Twitter, etc.).** Ideal-Logic has experience integrating with these systems for login using a third-party product called Gateway from Cirrus Identity. Please speak to us to discuss this option further. Extra charges will apply.

Ideal-Logic's authentication mechanisms also include the following features:

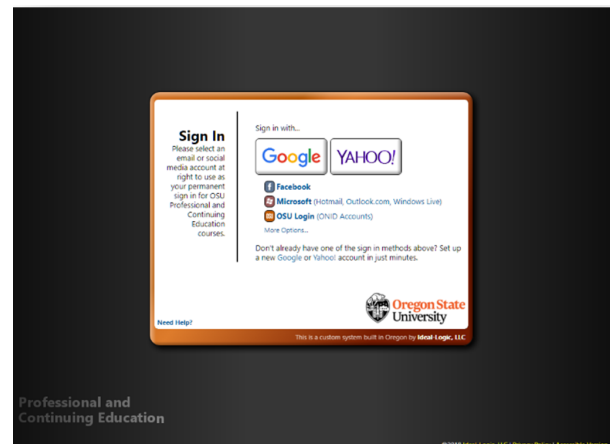
- Mixed Authentication.** Systems can be configured to support SSO authentication for those users who can use it (e.g. faculty/staff) and seamlessly also support Ideal-Logic password-based logins for people who cannot use the SSO login (e.g. community members).
- Complex Scenarios.** As a custom service, we can work with you to arrange the right login mix for your user base.



**SAML + Ideal-Logic.** Oregon State University Adventure Leadership Institute.



**SAML + Ideal-Logic with New Account.** University of Oregon Purchasing and Contracting Services.



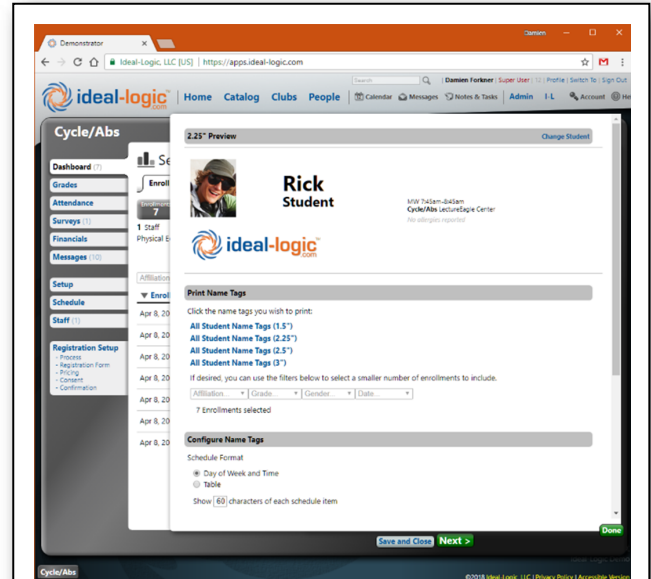
**Social Networking Login.** Oregon State University Professional and Continuing Education.

# Reporting Overview

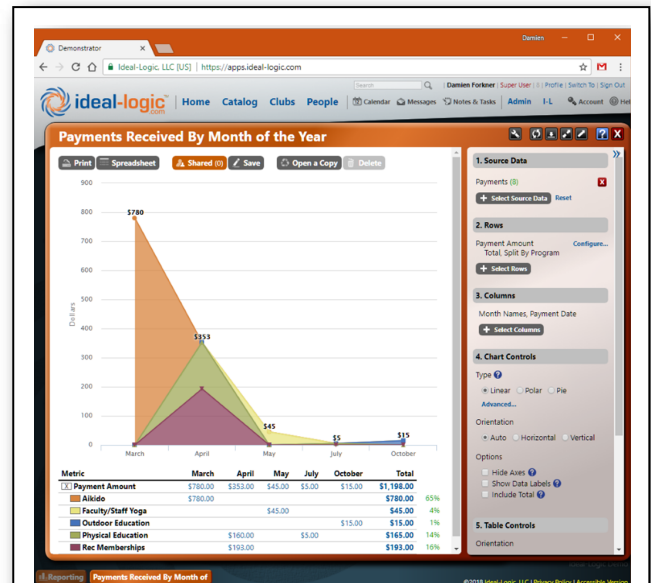


Ideal-Logic’s systems integrate reporting at many levels. Course instructors can log in to get data about their classes, department administrators can access data and reports for their departments, and higher level administrators can use advanced reporting functions to extract complex graphs and reports from the system.

- Spreadsheet Download.** Every data table in the system can be customized, filtered, sorted, and downloaded to a CSV file (Excel) with a single click. Custom reports can be saved and shared with other system users easily.
- Printed Reports.** The system includes many pre-built paper documents and reports that are used for various purposes. For examples, instructors and personal trainers can print attendance sheets, rosters, and special concerns lists for their courses. As part of our custom service, we can add new printable reports at any time.
- Integrated Dashboards and Gauges.** For metrics that really matter, we provide integrated real-time counts and totals into the interface to convey the data that’s most important to you. For example, when you open up a Pass, you’ll see gauges indicating how many people have purchased it and how much revenue has been earned. We can add more of these types of gauges as part of our service.
- Custom Reporting Interface.** We also provide a complex query/charting tool that can be used to generate many types of comparative reports and charts (e.g. “passes purchased by ethnicity,” or “revenue per fiscal year per department”).
- Custom Service.** Getting the right data the way you want it is sometimes a very complex problem to solve. Sometimes, something that can be expressed as a simple sentence in English is very difficult for a computer to produce. As part of our custom service, we recommend talking to us about your reporting needs and letting us help build the reports you need.



**Printed Document Example: Name Tags.** Instructors and staff can easily configure and print name tags for participants.



**Custom Reporting Interface.** Allows data to be aggregated and correlated over multiple axes. Print, save, share, or download a spreadsheet of results.

# Security and Compliance Overview



## Security Culture

Ideal-Logic's roots as a company come from automating intellectual property systems, which require fine-grained access control and extremely rigorous auditing, logging, and security protocols. Our development team brings security experience from IBM, Hewlett-Packard, and other large enterprise software systems. We deploy security as a combination of physical controls, hardware, software, processes, and organizational culture.

## Security Procedures

As a company policy, all data is encrypted with banking grade security protocols before it ever touches a disk or a network wire. Real-time, incremental, and full backups are fully encrypted before data is archived. Ideal-Logic's cloud infrastructure is designed for redundancy and security with security at every layer. Here are some of the security tools we use to be sure your data is secure:

- 256-bit encryption any time data is being sent over a network or written to a disk
- Hardened Linux servers
- Multiple layers of firewalls
- Cloudflare web application firewall
- Cloudflare Zero Trust to protect our internal services
- No server ports open on the Internet (Cloudflare Tunnels)
- Intrusion detection systems and centralized log monitoring (OSSEC)
- Network and web application scanning (Qualys)
- Active response mechanisms
- Offensive penetration testing (Metasploit, Kali)
- Port scanning (nmap)
- Fine-grained auditable access control
- Audit-quality logging of events
- Customizable password policies and security questions
- Multiple-factor authentication (when requested)
- Rigorous and thorough information security policies, procedures, and processes
- Background checks and ongoing security training for employees
- Development tools and procedures designed to prevent security lapses

## Developer Screening and Training

Ideal-Logic developers are carefully screened and trained for security. We particularly use the OWASP Top 10, but we use many other specific programming practices and techniques (for instance, Taint mode in Perl) to help protect the data our clients entrust to us.

## PCI Compliance

One major step Ideal-Logic takes to ensure security of its systems is to maintain SAQ-D level PCI (Payment Card Industry) compliance (v4.0). This rigorous auditing, designed to secure credit card data, helps us be sure our processes and controls meet industry standards.

## FERPA Compliance

Ideal-Logic is trained and well-versed in the Family Educational Rights and Privacy Act. Our systems include support for maintaining Directory-Level compliance and ensuring protection of personally identifiable information.

## HIPAA Compliance

Some Ideal-Logic systems, particularly registration systems, collect personal health information. Ideal-Logic ensures compliance with all aspects of HIPAA.

## ADA Compliance

Ideal-Logic uses the Web Content Accessibility Guidelines (WCAG) version 2.1 level AA as its standard for ADA compliance.

# Accessibility

Ideal-Logic is committed to providing a fully accessible solution that is fully compliant with the Americans with Disabilities Act and all related requirements. Moreover, we want to provide a system that works for everyone.

## **Voluntary Product Accessibility Template (VPAT)**

Ideal-Logic uses the Web Content Accessibility Guidelines (WCAG) version 2.1 level AA as its standard for ADA compliance. Current Voluntary Product Accessibility Templates (VPAT) are available at the following URLs:

- Version 2.4 (Current, January 2023): <https://apps.ideal-logic.com/vpat.pdf>
- Version 2.2 (November 2018): <https://apps.ideal-logic.com/vpat2.2.pdf>
- Version 1.3 (November 2016): <https://apps.ideal-logic.com/vpat1.3.pdf>

Ideal-Logic's windowing desktop user interface can be challenging for screen readers and assistive technology tools. Working with disability offices at a few different universities, we have created a version of the system optimized for this purpose. Via a text link at the bottom of every Ideal-Logic page and login screen (Accessible Version), users can access a version of the system without the windowing interface. In addition, this version of the system provides a higher level of labeling, headings, and specific form features that work better with screen readers.

## **Testing**

Ideal-Logic does internal testing to validate WCAG compliance. The last such testing occurred in December 2022 when we updated our VPAT to version 2.4.

Ideal-Logic has worked with disability offices at two universities to test and improve access to our system with screen readers and assistive technology tools. We received very positive feedback in our most recent round of improvements in this area.

## **Accessibility Roadmap**

There are no known accessibility gaps in the Ideal-Logic system at present. However, we treat accessibility not as a one-time goal but as an ongoing process. We always welcome feedback and input from users or experts in this area.

# Data Retention and Ownership

Data entered into Ideal-Logic systems is always owned by the client (not Ideal-Logic). We implement custom data retention policies for each client individually depending on their needs (the default is permanent retention).

- **Data Retention.** Data will be permanently retained unless Ideal-Logic is instructed otherwise.
- **Archiving Processes.** Ideal-Logic usually builds user-accessible archiving processes into the system. These generally take the form of an “Archive” button accessible to administrators that allow a particular item to be archived because it is no longer relevant. Usually, this just means that it is removed from the normal function of the system, but it is always still accessible (and restorable) from an “Archived Items” list. This entire process is configurable and controllable.
- **Data Accessibility.** All data entered in the system that has not been archived or deliberately removed will be indefinitely available to any user with access to view it. All data-viewing interfaces (tables, spreadsheets, lists) in the system automatically scale to handle large numbers of data items over many years. As data sets grow, more complex searching/querying/filtering features become available to help locate specific records. As part of our custom service, we work with our clients to help scale interfaces and workflow features as processes and their data sets grow over time.
- **Backups.** Ideal-Logic has never lost any data. Ideal-Logic has multiple offsite servers providing real-time backups of database transactions within seconds of their occurrence. Even in the event of a disaster that destroyed our server farm, we would not expect to lose any data. All backups are fully encrypted and secured according to the same standards as our production servers. Here are the backup mechanisms we use:
  - Multiple logical and physical storage mechanisms for each data object in our database.
  - Redundant databases in our primary server farm kept in sync in real-time.
  - Real-time backups to an offsite database that records changes within minutes of their occurrence.
  - Incremental hourly and daily backups to an offsite server.
  - Incremental hourly and daily backups to a third-party, external backup storage provider (Rsync.net).
- **Data Ownership.** Client is the owner of all data entered into the account. Client has the right to delete any data or request that it be deleted from Ideal-Logic’s servers at any time. Client also has the right to request an exported copy of all data from the account at any time. Ideal-Logic will make no use of data in the account without express authorization from the client.



# Initial Setup

We provide initial and ongoing support to all of our clients as part of our service. For initial setup, we often work very closely with clients via scheduled regular telephone/web meetings in order to get the system rolled out.

- **Setup Process.** For a system like this, we would expect to first identify the key players involved, then have meetings to fully understand the expectations and needs, then set up one or more regular meetings to work through issues and get feedback until the tool is rolled out.
- **I.T. Support.** No specific I.T. involvement is required to set up, roll out, or maintain this system, except to support individual integrations as required.
- **Learning Materials and Training.** We train all of our primary administrator(s) directly (via phone/web meeting), and we expect them to train other user groups or administrators as required. We are always available to participate or help with this task if it is appropriate. We integrate help documentation and training materials directly into our systems and processes. By default, we do not provide offline written documentation for our custom systems. When requested or appropriate to do so, we work with our administrators to produce training materials for their end users, although these materials are usually very specific to those client's processes.
- **Minimal Training Required.** One of the great benefits to a custom software service is that when something is confusing, we fix it. Our end user-facing interfaces generally never require training. Some of our clients provide training to their user groups, but this training often ends up being more about their processes than the software system. The most difficult training challenge is middle-level administrators, who have many configuration options and limited time to spend learning the system. We work with our primary administrators to help support this user group according to their individual needs.

# Timeline

The following timeline shows an anticipated rollout schedule and the involvement of major players. Upon acceptance of this proposal, Ideal-Logic will work with Texas A&M University System to build a prioritized schedule and rollout plan.

	<b>Ideal-Logic</b>	<b>TAMU Project Lead(s)</b>	<b>TAMU I.T.</b>
<b>Project Start</b>	Project organization	Meet with I-L to initiate project	Meet with I-L to spec out integration projects
<b>Month 1</b>	Implementation start	Meet bi-weekly with I-L to review progress	Assist I-L with SSO and Directory integrations
<b>Month 2</b>	Launch for admin users	Login and begin testing	Assist I-L with other integrations
<b>Month 3</b>	Beta launch for testing	Training and testing	
<b>Month 4</b>	Launch for all users	Work with I-L to resolve any issues	Validate all integrations and transition to support mode
<b>Rest of First Year</b>	Refine system based on usage and feedback	Monthly check-in meetings	
<b>Second Year</b>			
<b>Future Years</b>			

# Project Management

## Project Management and Process Methodology

Ideal-Logic provides a suite of tools and processes to manage development and track tasks related to system implementation, roll-out, and delivery. At its heart, the system is a hierarchical queue of development tasks and deliverables. We will initially populate this queue with content from the proposal and our understanding of the project, and we expect to work with TAMU continually to refine this queue as our understanding of the project improves.

We have created 10+ Youth Safety systems, and we have the basic foundation in place that we can customize to match your processes.

In our experience, it is usually not possible to have every piece of functionality ready for initial roll-out, nor is it desirable to do so. We usually try to focus on the critical pieces first and refine them until they work smoothly before adding in more pieces. As part of our custom application service, we expect to expand the features and capability of the system over time. We will work with TAMU to make sure we are targeting the critical areas appropriately, especially in the initial implementation period.

## TAMU Resources

The initial need for the first six months of the project will be access to some key resources at TAMU to assist us with rollout:

- **Primary Contact.** We will need one or two people who will serve as our primary point of contact for this project. Ideally, this will be someone who knows most or all of the relevant processes well and is willing to help negotiate the relative needs and priorities of each program area. We expect to have one person that we can refer to for final say on prioritization, new feature requests, and other development questions that we cannot answer. The more this person is willing to engage with us, help us gather information, and help us prioritize our development, the more likely a successful rollout will be. We will need to meet with this person weekly or bi-weekly via a phone and in-person. This will be the resource we will turn to whenever we have a question.
- **I.T. Resources.** In implementing the system at TAMU, much of the work will be customizing the system with the assistance of our Primary Contact(s). This work can be done independent of TAMU I.T. We will work with TAMU I.T. resources to complete any integration projects (e.g. Background Checks, Safety Trainings, etc.).

# Testing and Development



Ideal-Logic provides multiple levels of testing/development environments to its clients depending on their needs.

- **Built-In Previews.** For many of our client-configurable features, we provide built-in previews of output right alongside the configuration interface. For instance, when configuring a new registration form, there is a live preview mode that shows what the registration form will look like for end users.
- **Flagged Testing Data in Production Environment.** Many of our clients configure test environments directly in their production accounts. We have built in some testing flags to support this. For instance, it is possible to add a new program to the system and flag it as a “Test Program.” This makes it available in administrative interfaces and allows it to show up to designated end users. However, it does not appear in reporting or general end-user interfaces.
- **Separate User Accounts.** Many of our high-level administrators create personal accounts on the system using a personal email address so that they can interact with the system in exactly the same way as an end user. This provides a foolproof way to test the complete process that an end user will experience.
- **Independent Testing Account.** At no extra charge, we can provide a completely independent test environment in our production system. The data is completely separated, but the functionality and configuration are the same. This allows for end-to-end testing in more complex scenarios.

For a system of this scope, we would expect all four of these strategies to be used. We expect to work with Texas A&M University System to configure the best testing possible for different purposes.

**No extra charge.** Testing and development sandbox support as described above is part of our service and provided at no extra charge.

**Custom Form Design.** This interface is used to add custom questions to a registration form. Configuration is on the left and a live preview is shown on the right. A similar approach is used for other tasks in the system, such as designing certificates or paper documents.



# Working With Ideal-Logic (1/2)

Ideal-Logic provides a suite of processes and tools as part of its service to prioritize and resolve problems as quickly as possible. Efficient, timely response is a critical component of Ideal-Logic’s service. These processes and tools include:

- Immediate, automated developer notification of system errors or downtime
- Integrated help and support tools for users that create a database of help and feature requests
- Prioritization and classification tools for these requests, including time tracking and deadlines

## System Errors

In practice, Ideal-Logic responds to critical system issues within minutes. Errors and bugs are almost always handled within a few hours during normal work hours (M-F 8am-5pm PST). Outside of normal business hours, we provide best effort service based on the urgency or impact of a problem. A service issue can be escalated by sending an email to support@ideal-logic.com (which is checked at all times) and/or call 541-230-1087 and press 9 (which sends a message/text directly to our on-call support person). This should only be used in urgent situations.

## Requests for Features and Functionality

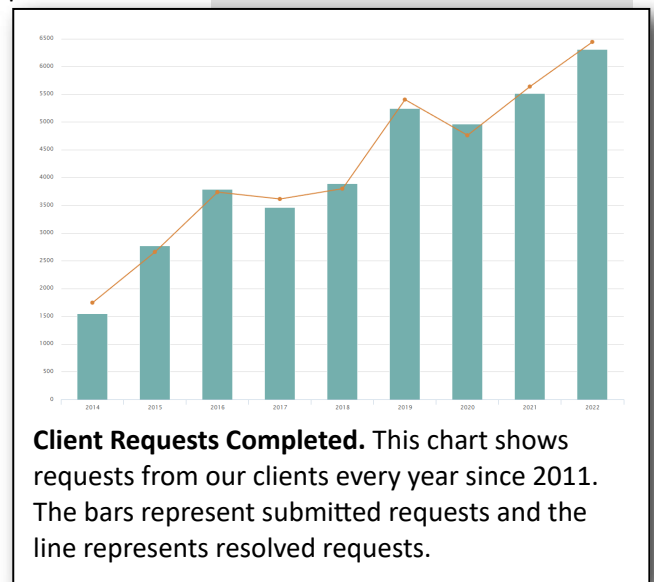
Requests for new features and functionality can be created by any user of the system. Account owners have the ability to review, prioritize, and classify these requests. Ideal-Logic works with clients to implement changes and updates as rapidly as possible. For a new module or feature, we commonly provide dozens or sometimes hundreds of updates over a relatively short period of time. For a more mature system, we roll out changes more slowly and deliberately, involving key administrators and users in the planning and release processes.

New features and functionality are provided at no additional charge as part of Ideal-Logic’s service. This is always the case unless the request is outside the scope of the problem we are contracted to solve. We will always provide feedback if we believe that a feature request is out of scope, and we can discuss how best to proceed.

## Service Response Times

In the last five years we have resolved over 23,000 requests from our customers, including new features, improvements, tweaks, and fixes. Of these 23,000 completed requests:

- 28% were resolved in less than 2 hours,
- 50% were resolved in less than 24 hours,
- 71% were resolved in less than 1 week, and
- 81% were resolved in less than 2 weeks, and
- only 19% required more than 2 weeks to resolve, generally because they were larger projects.



# Working With Ideal-Logic (2/2)



## Request Counts

Many of our clients have requested hundreds or even thousands of new features and changes to their systems. This is a normal part of refining and expanding the usefulness of an Ideal-Logic solution. From our own data, we can make some generalizations about how many changes to expect, on average.

Very Large Systems, Campus-Wide:

**>500 requests per year**

Large Systems, Campus-Wide:

**>300 requests per year**

Department-Level Systems:

**>100 requests per year**

Ideal-Logic does not provide direct end user support. System support tools and integrated help mechanisms are designed to route end users to the appropriate point of contact within your organization. Except in extraordinary circumstances, Ideal-Logic will never communicate with your end users directly. When we receive help requests directly from end users, we will route them to you. When we detect an end user support issue or problem, we will fix the error and then ask you to notify the end user that the issue has been corrected.

Ideal-Logic generally expects all feature requests, change requests, and other work to be prioritized and communicated to us from a single source. This can be a specific designated administrative lead (with backup) or a committee. We will often resolve, fix, or upgrade your application on our own initiative (often in response to user help requests), but we expect a single point of contact who can help us resolve development priorities and conflicts.

One of the benefits of Ideal-Logic's service is that we will correct or change places in the system that are causing confusion or support load. We will always work with you to be sure that the end user support load is manageable.

**Susan Yeager**, Administrative Program Assistant, OSU Professional and Continuing Education:

"Ideal-logic is actually one of the best tools I work with at my job. I have been working with it daily for two and a half years and I only have positive things to say about the program and the staff. The program is so intuitive that I was able to pick up the basic use quickly. I train people in Extension offices all over the state to manage the registrations that I set up for them, and also how to set up their own registration forms. Ideal-logic's friendly user-interface makes it easy for me to do most of the training with the remote offices by phone. Extension has also been happy to use it, as 2017 saw over 24,500 enrollments go through Ideal-logic, a number I can pull up in 5 seconds from their reporting function.

It is also a dynamic program and many of the registration set ups that I use it for are very outside the box. I have called up Paul and Damien many times for advice or help to do a set up a certain way, and they always have a solution. Sometimes they even have to custom build the feature that solves my problem! Their customer service and responsiveness to my questions is the best I have ever encountered in any business. Even though I know how busy they are, they always say they have time to talk to me. I can rely on them to be responsive and available, and to have solutions for whatever issue has come up for me and my work.

I am very grateful that we have Ideal-logic as a resource. Please feel free to contact me if you have any questions."

# Training and Technical Support

## Training

Ideal-Logic provides training as part of our service. This includes initial training as part of system development and roll-out and additional training for new administrators and new features over time.

- **Learning Materials and Training.** We train all of our primary administrator(s) directly (in person or via phone/web meeting), and we expect them to train other user groups or administrators as required. We are always available to participate or help with this task if it is appropriate for us to help. By default, we do not provide documentation for our custom systems. When requested or appropriate to do so, we work with our administrators to produce training materials for their end users, although these materials are usually very specific to those client's processes.
- **Minimal Training Required.** One of the great benefits to a custom software service is that when something is confusing, we fix it. Our end user-facing interfaces generally never require training. Some of our clients provide training to their user groups, but this training often ends up being more about their processes than the software system. The most difficult training challenge is middle-level administrators, who have many configuration options and limited time to spend learning the system. We work with our primary administrators to help support this user group according to their individual needs.

## Technical Support

Ideal-Logic does not provide direct end user support. System support tools and integrated help mechanisms are designed to route end users to the appropriate point of contact within your organization. Except in special circumstances, Ideal-Logic will never communicate with your end users directly. When we receive help requests directly from end users, we will route them to you. When we detect an end user support issue or problem, we will fix the error and then ask you to notify the end user that the issue has been corrected.

Ideal-Logic generally expects all feature requests, change requests, and other work to be prioritized and communicated to us from a single source. This can be a specific designated administrative lead (with backup) or a committee. We will often resolve, fix, or upgrade your application on our own initiative (often in response to user help requests), but we expect a single point of contact who can help us resolve development priorities and conflicts.

One of the benefits of Ideal-Logic's service is that we will correct or change places in the system that are causing confusion or support load. As a result, end user support issues are usually related to your processes and not system issues. We will always work with you to be sure that the end user support load is manageable.

# Upgrades and Feature Requests

Ideal-Logic's service is designed to provide a continuous stream of upgrades as part of its normal functions. Upgrades and changes always occur at no additional charge, unless such upgrades are out of scope of the contract.

**Upgrade and Feature Requests.** Clients may request new features, changes, improvements, and upgrades at any time. Ideal-Logic provides a support queue tool for administrative users to review, prioritize, and track these requests at any time.

**Vendor-Initiated Upgrades.** Ideal-Logic occasionally makes improvements to its platform that cause more widespread effects to particular clients. In such cases, we always communicate with the client via phone or email before rolling out changes.

**Small Changes.** Small changes, process tweaks, and new process features are generally completed and published to our production environment immediately. Depending on the nature or scope of the change, we may:

- Schedule a meeting to walk through the new functionality in person and get feedback before rolling it out.
- Communicate with the client to work out a roll-out strategy and timeframe.
- Roll out the changes and send a notification to the client after the fact.
- For many minor changes, we may roll them out and send a batch notification via email to let the client know what's changed.

**Large Changes.** Larger changes, usually the result of major process changes, significant rewrites, or new features or functionality, are always rolled out with client involvement. Depending on the nature or scope of the change, we may:

- Schedule a regular meeting (e.g. weekly) to work on the project with you.
- Have a phone call or web meeting to review the functionality.
- Send written descriptions of the functionality for feedback.
- Roll out the change at a time when it will not cause any disruption to staff or end users of the system.

**Additional Charges.** Changes, new features, improvements, tweaks, fixes, and even rewrites of entire functionality within the scope of the project/contract are covered by the Annual Service Charge. Additional charges are only assessed when:

- New features or functionality are requested that expand the scope of the project (e.g. adding a new process or workflow).
- The scope of the system grows (e.g. adding a new group of users to the system to log in and interact with the system).
- Integration with external systems is required.

We never undertake work that would require additional charges without written consent from the client to begin. Such projects can be billed at our \$150/hour development rate or charged a flat rate for each project.

## Request Counts

Many of our clients have requested hundreds or even thousands of new features and changes to their systems. This is a normal part of refining and expanding the usefulness of an Ideal-Logic solution. From our own data, we can make some generalizations about how many changes to expect, on average.

Very Large Systems, Campus-Wide:

**>500 requests per year**

Large Systems, Campus-Wide:

**>300 requests per year**

Department-Level Systems:

**>100 requests per year**



# Project Scope Expansion

Ideal-Logic's custom application service price includes changes and modifications that fit within the scope of the problem that we are contracted to solve. Sometimes, work needs to be done that is outside of scope or that extends the scope. Here is our process for handling such work:

- **Scope Determination.** We work with our clients to determine that a request is out of scope. This can sometimes be a fuzzy line, so we communicate openly when we think a project or request is out-of-bounds.
- **Hourly Rate.** Custom out-of-scope development work can be done by Ideal-Logic at our development rate of \$150/hr. This is uncommon.
- **Per-Project Charge.** Usually, we provide a one-time total price for an out-of-scope development project and the client agrees to the total charge (e.g. \$2000 to add a connection to an external system). The per-project total is based on our hourly estimates of the time required to complete the work.
- **Scope Expansion.** Frequently, we add addendums or modifications to our client contracts to expand the scope and incorporate more process or different user groups. These usually come with an increased annual charge and/or a one time implementation charge. We pro-rate any such charges appropriately and can either bill these additional charges independently or roll them into the annual invoice.
- **Integration with External Systems.** Except as specifically spelled out in this proposal, integration work with external systems is always billed per-project or hourly. Integration with any external systems not specifically covered in this proposal will be at an additional charge.
- **Written Consent Required.** Ideal-Logic will never undertake work that will generate an additional charge without written consent for the project ahead of time.

**Meddie Sims**, Enrollment Specialist, OSU Professional and Continuing Education:

"I have been working with Ideal-Logic since I started at Oregon State University about two and a half years ago. I work in the systems provided by them daily, and on busy days, hourly. I usually have at least four instances of their program open at the same time, which allows me to multitask between projects and still respond to student needs as necessary.

The system is extremely flexible and comprehensive and gives us the ability to do "deep dive" reporting. Ideal-Logic is comprised of individuals who are responsive, supportive, and very willing to explain a feature or process to me if I don't understand. In addition, the company is also responsive to our needs. If we have an issue not already addressed in the system, or if we have a feature that would help us be more efficient, they will do all they can to remedy the situation and/or add a feature.

In summary, I really can't say enough good things about Ideal-Logic and the people who work there. More than any vendor I've ever worked with, they are there for us."

# System Pricing w/ Main Campus

	Year 1	Year 2	Year 3+
<b>Annual Service Charge</b> <b>Youth Safety &amp; Compliance System</b> All-inclusive annual fee that includes: <ul style="list-style-type: none"> <li>• Ongoing consultation and revision to meet client needs</li> <li>• System usage for all users</li> <li>• Maintenance, service, support, and upgrades</li> <li>• All services and features described in this proposal</li> </ul>	\$30,000	\$30,000	\$30,000
<b>One-Time Implementation Charge</b> One time charge (setup fee) to cover time spent working on the project during rollout. Includes: <ul style="list-style-type: none"> <li>• Process consultation and research</li> <li>• Initial implementation of custom system</li> <li>• Customization and branding as desired</li> <li>• Delivery, initial training, and phased rollout</li> </ul>	\$15,000		
<b>Integrations</b> System price includes integration with: <ul style="list-style-type: none"> <li>• Spreadsheet import/export</li> <li>• Custom API to extract data from the system</li> <li>• Single Sign-On and Directory (LDAP)</li> <li>• Background Check Completion and Training Completion</li> </ul> Additional integration projects are not included and will be priced separately, per-project or hourly.	\$4,000		
<b>Totals</b>	<b>\$49,000</b>	<b>\$30,000</b>	<b>\$30,000</b>

**Pricing shown here is for the Youth Safety and Compliance system and features only as described in this proposal.**

**The following universities are included in this pricing:**

Texas A&M University, Prairie View A&M University, Texas A&M University-Commerce, Tarleton State University, West Texas A&M University, Texas A&M University-Kingsville, Texas A&M University-Corpus Christi, Texas A&M International University, Texas A&M University-Texarkana, Texas A&M University-Central Texas, and Texas A&M University-San Antonio.

Annual service charge rates are subject to change. You will be notified a minimum of 90 days before renewal of any increase in service charges. If Texas A&M University System requests changes or new modules that are outside the scope of this proposal, then Ideal-Logic will prepare a new proposal for the new functionality. An authorized representative of both Ideal-Logic and Texas A&M University System will need to agree in principle or compose a written amendment for additional work before such projects will be undertaken.

**Pricing is valid until November 1, 2023.** This proposal is only for Texas A&M University System.

# System Pricing w/o Main Campus

	Year 1	Year 2	Year 3+
<b>Annual Service Pricing</b> <b>Youth Safety &amp; Compliance System</b> All-inclusive annual fee that includes: <ul style="list-style-type: none"> <li>• Ongoing consultation and revision to meet client needs</li> <li>• System usage for all users</li> <li>• Maintenance, service, support, and upgrades</li> <li>• All services and features described in this proposal</li> </ul>	\$20,000	\$20,000	\$20,000
<b>One-Time Implementation Charge</b> One time charge (setup fee) to cover time spent working on the project during rollout. Includes: <ul style="list-style-type: none"> <li>• Process consultation and research</li> <li>• Initial implementation of custom system</li> <li>• Customization and branding as desired</li> <li>• Delivery, initial training, and phased rollout</li> </ul>	\$10,000		
<b>Integrations</b> System price includes integration with: <ul style="list-style-type: none"> <li>• Spreadsheet import/export</li> <li>• Custom API to extract data from the system</li> <li>• Single Sign-On and Directory (LDAP)</li> <li>• Background Check Completion and Training Completion</li> </ul> Additional integration projects are not included and will be priced separately, per-project or hourly.	\$4,000		
<b>Totals</b>	<b>\$34,000</b>	<b>\$20,000</b>	<b>\$20,000</b>

Pricing shown here is for the Youth Safety and Compliance system and features only as described in this proposal.

The following universities are included in this pricing:

Prairie View A&M University, Texas A&M University-Commerce, Tarleton State University, West Texas A&M University, Texas A&M University-Kingsville, Texas A&M University-Corpus Christi, Texas A&M International University, Texas A&M University-Texarkana, Texas A&M University-Central Texas, and Texas A&M University-San Antonio.

**Texas A&M University (Main Campus) is excluded from this pricing.**

Annual service charge rates are subject to change. You will be notified a minimum of 90 days before renewal of any increase in service charges. If Texas A&M University System requests changes or new modules that are outside the scope of this proposal, then Ideal-Logic will prepare a new proposal for the new functionality. An authorized representative of both Ideal-Logic and Texas A&M University System will need to agree in principle or compose a written amendment for additional work before such projects will be undertaken.

**Pricing is valid until November 1, 2023.** This proposal is only for Texas A&M University System.

# Invoicing and Payment Terms

## Payment Schedule

Ideal-Logic bills clients as follows:

1. The **One-Time Implementation Fee, one-time integration fee and first year's Annual Service Charge** are due upon contract signing.
2. Once the application is delivered and deployed for testing, we will fix a **Service Start Date**. This does not necessarily mean that the application is 100% complete and all processes are implemented, but it means that you have logged in and started using the system beyond simple initial configuration. The date when this occurs is mutually agreed upon by you and Ideal-Logic.
3. The **second and subsequent year's Annual Service Charges** are due on your renewal date (*before* the year of service to which they apply), which is on the anniversary of your Service Start Date each year.

If the scope of your contract ever expands to include additional annual service charges (for instance, if you add a new process to your system), then these annual charges will be pro-rated to the remainder of your current service year. Then they will be billed in full for subsequent years along with your existing annual service charges. (Note: any such changes must be agreed in advance and in writing, as described on {&page|System Pricing}.)

## Invoicing

- Ideal-Logic typically issues invoices 30 days before your renewal date with Net 30 payment terms.
- We accept payments via check or electronic funds transfer.
- We can work with your AP department and use Texas A&M University System processes as required.

## Additional Fees

Quoted prices are all-inclusive. As described on {&page|System Pricing}, there are no additional fees to work with Ideal-Logic.

Any expansion of scope, new integration projects, or other system changes that might require additional fees require agreement in writing before Ideal-Logic will undertake such work.

# Pricing FAQ

## How are your prices calculated?

Ideal-Logic prices are computed based on several factors:

- The size and scope of the problem to be solved,
- The number of users (particularly administrative users), estimated size of the data set, and the anticipated growth of this data set over time,
- The complexity of the processes to be implemented and our estimates of how much these processes will evolve over time,
- The amount of infrastructure (servers, backup, etc.) that will need to be deployed and maintained,
- The amount of time we anticipate spending on the application, both in the first year and future years, and
- Experience and comparison with similar systems we have deployed in the past.

In most cases, the majority of the cost in our proposals is time (man-hours). Infrastructure costs are fixed and relatively low by comparison. We do everything in our power to reduce the amount of time required by reusing similar components from other systems, sharing functionality with other clients when possible, and continuing to improve our development processes. It is our goal to provide a full custom solution for a fraction of the cost.

## I don't expect many changes to my application. Can I pay a lower annual service charge and just pay for changes as I need them?

The short answer is "no." The long answer is that we have tried this approach many times, and it has never led to a useful solution. In order to deliver the best solution possible, we need you to have the freedom to call us anytime and tell us that something's not working the way you need it to work. You also need to have the freedom to call us and share a great idea to make some part of the system better that's going to save a lot of time and energy. We, in turn, need the freedom to say, "Great idea. Let's do it." We have found that this does not work if we have to negotiate a price for every change.

However, sometimes our clients with budgeting constraints pay for several years of service up front in order to make the service function more like a capital expenditure. We are happy to help with this.

## Will my price ever change?

When you contract with us, we are committing to do whatever it takes to solve the problem for the price we propose. Presuming the problem to be solved does not increase in scope beyond what's documented in this proposal, your price will stay the same.

If you ask us to build something beyond the scope of this proposal, then we will prepare a proposal for the expanded scope and present it to you.

Finally, we are always working to make our service cost less in terms of money and man-hours required to provide it. We normally re-evaluate our clients after their third year of service to see how things have changed. However, you can expect to pay the service charge as specified here for at least three years, as it often takes us that long for a project to mature and stabilize.

References

# Reference List

The following list of primary contacts all work closely with us on Youth Safety Compliance systems at their respective universities. All are open to contact regarding their experience working with Ideal-Logic.

**Leekeshia Williams**

University of Texas at Austin  
leekeshia.williams@austin.utexas.edu  
(512) 471-0594

**Brandy Cunningham**

Iowa State University  
brandy@iastate.edu  
(515) 294-6856

**Greg Linke**

Clemson University  
glinke@clemson.edu  
(864) 656-5716

**Eric Cardella**

Oregon State University  
eric.cardella@oregonstate.edu  
(541) 737-9362

**Marco Di Fava**

New York University  
marco.difava@nyu.edu  
(212) 998-1291

**Laura Harrington**

University of Washington  
laurah13@uw.edu  
(206) 616-5706

**Carla Markx**

University of Central Florida  
carla.markx@ucf.edu  
(407) 823-4323

# Client List

Here is the current list of our Youth Safety and Compliance clients:

- Auburn University**
- Clemson University**
- DePaul University**
- Illinois State University**
- Iowa State University**
- Michigan State University**
- New York University**
- Oregon State University**
- Purdue University**
- Rice University**
- Rochester Institute of Technology**
- University of Alabama Birmingham**
- University of Alaska**
- University of Central Florida**
- University of Delaware**
- University of Notre Dame**
- University of Texas at Austin**
- University of Virginia**
- University of Washington**
- Utah State University**
- Virginia Tech**

# University of Washington YPDS



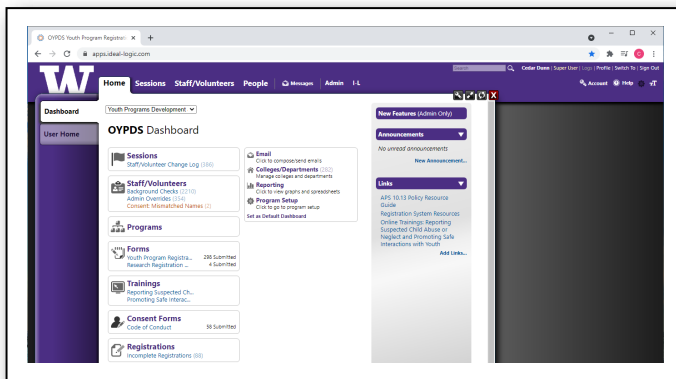
Client Since	Active Users	Requests/Features Completed
2019	9,037	886

Ideal-Logic began working with University of Washington Youth Programs Development and Support group in 2019 to implement a comprehensive system to manage all youth program and staff/volunteer compliance across campus.

The system has recently been expanded to capture registrations from research programs on-campus that will work with minors and will need to be reported along with any IRB documentation. Specific solutions that their Ideal-Logic system provides:

- Program Directors are able to log in and easily see each of their reported programs/sessions along with their staff compliance. They can edit this information and continue adding Staff/Volunteers after submission.
- Automate email notifications to handle a large number of communications regarding general requirement reminders and expiration information to Staff/Volunteers, overall program compliance status to Program Directors, Background Check status, incomplete submissions, and yearly registration reminders, etc. This reduces the staff hours for administering these types of emails manually.
- Import data and create unique reporting, including 'report' cards that communicate to programs what areas of the policy they were compliant and/or not complaint with.
- Create separate HR system to track background check requests and collect authorization and disclosure forms.

In the future we are looking to develop an auditing process for site visits and tracking of compliance beyond the standard staff/volunteer compliance. In this case study you can see how our system evolves with our client as their processes change and new needs arise.



**Laura Harrington** Program Director, Office for Youth Development and Support:

“We could not have implemented our youth protection policy without Ideal-Logic. Our policy has many moving parts, and making sense of them (let alone complying with them) is overwhelming for many. Our Ideal-Logic system makes sense out of the seeming chaos of multi-step requirements and varied timelines. The system has streamlined work and communication between our office, Human Resources, and almost 300 youth programs and their personnel.

The system not only initiates and tracks completion of requirements, but imports and organizes data from multiple other disparate University systems. The result is a one-stop shop that facilitates clear communication with multiple stakeholders, saves us hundreds of hours of administrative work (and tedium!), and improves compliance with our policy.

Ideal-Logic has been an integral thought partner in designing and building this system to meet our exact needs. (They often know our needs better than we do!) They listen to our ideas and improves on them; they hear our concerns and answer them with clever, thoughtful, and UW-specific solutions.

Ideal-Logic promised a system that was “endlessly customizable,” and they have proven that to be true over and over. As our work evolves and grows more nuanced, we know that Ideal-Logic’s system can accommodate that growth and complexity and continue to be our greatest tool in enacting youth protection on our campus.”



# University of Delaware Youth Safety

Client Since	Active Users	Requests/Features Completed
2021	886	309

Ideal-Logic has worked with University of Delaware Protection of Minors to implement an extensive centralized system to manage all programs serving minors and staff/volunteer compliance across campus.

**Alice Moore** Protection of Minors Program Coordinator, University of Delaware Office of Equity and Inclusion:

“Since 2015, UD has had a Protection of Minors Policy in place, however, trying to manage all the components for compliance in addition to my HR colleague processing CBCs and the increase in programs serving minors, we were overwhelmed. Having met Paul at HEPNet in 2019 we reached out to Ideal-Logic to begin the process of obtaining the administration buy-in for the need of the centralized compliance registration system.

With the help of Ideal-Logic we were able to demonstrate that the time savings for administering the CBCs as well as the ability to track their expiration and automated renewal process was a tremendous cost savings to the University. With the Pandemic delaying the approval process Ideal-Logic continued to work with us throughout our UD internal approval processes. In 2021 we began to design and build the system to meet our specific needs and November 2021 went live with UDPOMS.

Our Ideal-Logic system has been overwhelmingly well received. Program Directors find the system user friendly to register their programs and now in our second season to renew their sessions with minimal updates to the registration. The system has streamlined our compliance requirements with over 300 sessions. The automated email communications to program directors and staff are a feature that program directors were thrilled with as well as the ability to see the compliance status of their staff. The effectiveness of this tool is even more apparent as they renew sessions, immediately reflecting the compliance status with only new or expiring requirements needing action. The UD system also allows for a read only ability for our internal audit unit to review our programs for meeting the State of Delaware compliance for protection of minors.

In addition to the system tracking completion of compliance requirements, the capability of pulling analytics of preset reports, charts/graphs, and spreadsheets as well as the ability to create your own data queries is another feature that has been extremely helpful in providing statistics to UD administration.

The Ideal-Logic team listens to our ideas and often helps to expand those ideas to meet or exceed our exact needs. On those rare occasions when something doesn’t appear just right, they are quick to respond to our inquiries and resolving the issue. Ideal-Logic has held to their promise of a system that is uniquely UD and “endlessly customizable,” their proven track record continues with our conversations in the ever-changing needs with the protection of minors at the University of Delaware. We know that Ideal-Logic can accommodate the growth of our programs and the complexity of protecting minors on our campus.”