

AMENDMENT OF SOLICITATION / MODIFICATION OF CONTRACT		1. Contract Number CFOPD-14-C-031	Page of Pages 1 2	
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2. Amendment/Modification Number Modification 3	3. Effective Date See block 16C Below	4. Requisition/Purchase Request No. Funding Certification	5. Solicitation Caption Modernized Integrated Tax System (MITS)	
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6. Issued by: Office of the Chief Financial Officer Office of Contracts 1100 4 th Street SW, Suite E610 Washington, DC 20024	Code	7. Administered By: (If other than line 6)		
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8. Name and Address of Contractor (No. street, city, county, state and zip code) Fast Enterprises, LLC 6400 S. Fiddler's Green Circle, Suite 1500 Greenwood Village, CO 80111 ATTN: James Harrison, Partner Email: jharrison@fastenterprises.com Telephone: 877-275-3278	9A. Amendment of Solicitation No.	
	9B. Dated (See Item 11)	
	10A. Modification of Contract/Order No. X CFOPD-14-C-031	
	10B. Dated (See Item 13) July 2, 2014	

DUNS	17-047-2414	FEIN	13-3758609
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11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers is extended is not extended. Offerors must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) completing Items 8 and 15, and returning _____ copies of the amendment; (b) acknowledging receipt of this amendment on each copy of the offer submitted; or (c) separate letter or fax which includes a reference to the solicitation and amendment number. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by letter, telegram or fax, provided each letter or telegram makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified

12. Accounting and Appropriation Data (If Required)

Encumbrance Codes:

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

X	A. This change order is issued pursuant to (Specify Authority): 27 DCMR 3601.2(c) The changes set forth in Item 14 are made in the Contract/Order No. in Item 10A.
	B. The above numbered Contract/Order is modified to reflect the administrative changes (such as, changes in paying office, appropriation date, etc.) set forth in Item 14, pursuant to the authority of 27 DCMR, Chapter 36, Section 3601.3.
	C. This supplemental agreement is entered into pursuant to authority of:
	D. Other (Specify type of modification and authority) F.2: Option to Exercise Period of Performance.

E. IMPORTANT: Contractor is OR is not required to sign this document and return 1 copy to the issuing office.

14. Description of Amendment/Modification (Organized by UCF Section headings, including solicitation/contract subject matter where feasible.)

This modification to the contract identified in Block 10A above, is hereby modified as follows in Items 1:

1. Attachment J.5 Sublicensing Agreement Delivery Point Validation, LACSLink, and SuiteLink Products is hereby incorporated into the contract.

ALL OTHER TERMS AND CONDITIONS REMAIN UNCHANGED

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A remain unchanged and in full force and effect.

15A. Name and Title of Signer (Type or print) James G. Harrison, Member		16A. Name of Contracting Officer Drakus Wiggins, CPPO, CPPB	
15B. Name of Contractor James G. Harrison (Signature of person authorized to sign)	15C. Date Signed 1-Mar-2015	16B. District of Columbia DW 588 (Signature of Contracting Officer)	16C. Date Signed 3/1/15

Sublicensing Agreement
Delivery Point Validation, LACSLink, and SuiteLink Products

This agreement for sublicensing the Delivery Point Validation Product, the LACSLink Product, and the SuiteLink Product, licensed products of the United States Postal Service (USPS), is made as of the 1st day of March, 2015, by and between:

(Sublicensee): Office of the Chief Financial Officer, Office of Tax and Revenue,

having its principal place of business at:

(Address) 1101 4th Street SW, Suite 7036

(City) Washington (State) DC (Zip+4) 20024,

and Fast Enterprises, LLC (Fast) with offices at: 6400 S. Fiddlers Green Circle, Suite 1500, Greenwood Village, CO 80111-4953.

In consideration of the grant and the mutual covenants set forth herein, the parties agree as set forth below:

Introduction

1. USPS has created confidential and proprietary systems (referred to herein as the Delivery Point Validation Product, the LACSLink Product, and the SuiteLink Product, and further defined below).
2. Sublicensee wishes to use this technology to validate customer address information with Fast Enterprises' CASS-certified validation software.
3. The terms and conditions of this Agreement shall be legally binding upon Sublicensee and shall inure to the benefit of USPS.

Definitions

1. **"LACSLink Product"** means the confidential and proprietary system developed by USPS that provides for the conversion of existing addresses to their new or updated or replacement address or the like, and which includes the database and the software to effect the conversion.
2. **"Delivery Point Validation Product"** ("DPV Product") means the new USPS proprietary technology product designed to help mailers validate the accuracy of address data, right down to the physical delivery point.
3. **"SuiteLink Product"** means the confidential and proprietary system developed by USPS that can append secondary information (also known as unit information) for some business addresses when the input information does not lead to an exact match. This additional information will allow delivery sequencing where it would not otherwise be possible.
4. **"Licensed Materials"** consist of only:
 - a. The LACSLink Product, and
 - b. The DPV Product, and
 - c. The SuiteLink Product, and
 - d. any updates to the above that USPS provides to Fast, and which will be distributed by Fast to Sublicensee under the terms of this Agreement.
5. **"Interface"** means those components of the certified system, GenTax, which use the Licensed Materials.
6. **"Deliverables"** means letters, flats, postcards, packages, leaflets, magazines, advertisements, books, and other printed material, and any other item delivered by USPS.
7. **"Territory"** means the geographic boundaries governed by the United States, its territories, and possessions.

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8. **“End User”** means an Entity that *USPS* has licensed to use the Licensed Materials to update address and mailing lists. Sublicensee is an End User.
9. **“Entity”** means a single corporation or partnership or an individual person (i.e., a sole proprietorship), or a government body in good standing, licensed and registered to do business or operate in the Territory, and does not include any party or affiliation(s) of parties that is not recognized as a legal entity by the laws of the jurisdiction(s) in which it conducts business or operates.

Sole Purpose and Scope

1. The sole purpose and scope of this sublicense is limited to providing Sublicensee with access to Licensed Materials to validate customer address information.
2. Sublicensee may not use information obtained or derived from the Licensed Materials for any purpose inconsistent with this Agreement.
3. Sublicensee may not use the Licensed Materials to artificially generate address records not already within the possession of Sublicensee.
4. This sublicense represents the entire agreement between the parties regarding its subject matter, superseding any prior oral or written agreements or understandings relating thereto.

Grant of Rights

1. The End Users' right to use the Interface shall be strictly limited to use only within the Territory, and only for updating addresses and mailing lists used to prepare Deliverables for deposit with *USPS* in conformance with *USPS* requirements.
2. End Users shall have no right to sublicense, sell or otherwise distribute, reproduce, perform, or prepare derivative works of the Interface.
3. End Users shall acknowledge:
 - a. *USPS*'s ownership of the LACSLink Product, the DPV Product, the SuiteLink product, and the *USPS* Marks
 - b. Fast provides the Interface in part under license from *USPS*, and
 - c. That End User is a sublicensee under Fast's licenses from *USPS* and obtains from Fast no broader right than Fast under those licenses.
4. End Users shall be strictly limited to using the Interface only as a component of Fast's CASS-certified address validation product, and
5. End Users shall acknowledge and agree that End User does not have a right to sublicense, distribute, reproduce, perform, display, prepare derivative works, or sell the Interface or *USPS*'s Marks.

Confidentiality of the Licensed Materials

1. The Licensed Materials are confidential and proprietary to *USPS* and shall remain the property of *USPS*. Nothing contained in this Agreement shall give Sublicensee any right, title, or interest in or to the Licensed Materials except as the recipient of the license granted in this Agreement.
2. Sublicensee agrees to hold all information concerning Licensed Materials confidential, to disclose said information only in accordance with the provisions of this Agreement, to take all reasonable steps to safeguard the confidentiality of the Licensed Materials and any or all parts thereof, and to prevent unauthorized disclosure thereof by Sublicensee's employees, agents, and representatives.
3. Unauthorized disclosure includes using the Licensed Materials for artificially creating or maintaining address lists, providing the Licensed Materials or any portion thereof to any third party for any purpose or under any conditions or any other use of Licensed Materials that is not specifically authorized by this Agreement.

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4. Sublicensee agrees to control and restrict any access to address information in or from Licensed Materials to employees or other persons who need it to perform work for Sublicensee under this Agreement.
5. This Agreement does not give Sublicensee any proprietary interest in the address information in the Licensed Materials.

IN WITNESS WHEREOF, the parties have executed this Agreement effective as of the date first written above:

SUBLICENSEE:

BY: 
NAME: Drakus Wiggins
TITLE: Contracting Officer
DATE: 3/1/15

FAST ENTERPRISES:

BY: 
NAME: MATHEW KANTOR
TITLE: PROJECT MANAGER
DATE: 1/29/2015

Licensing Structures

Licenses between Fast Enterprises and USPS:

- 1) CASS certification license
 - a. This is awarded when validation software meets the accuracy requirements for the current CASS cycle
 - b. A fee is paid to cover their costs of administering and grading tests
- 2) Address Information Systems (AIS) Products License
 - a. This license includes our yearly subscription to receive monthly updates for the following data products: Zip+4, CityState, and ZipMove
 - b. Our license has also been amended to allow Fast to distribute up to 100 copies of each product to our customers
- 3) Licenses for the DPV Product
 - a. The Interface Developer's License grants us the right to confidential implementation details regarding the DPV product and the right to develop an interface for our validation object to use the DPV product
 - i. This license must be maintained in order to keep our CASS certification
 - b. The Interface Distributor's License grants us the right to distribute the interface and monthly data to our customers, providing they enter into a sublicense agreement with Fast (see details in the next section)
- 4) Licenses for the LACSLink product
 - a. Interface Developer's License (similar to the DPV Developer's License)
 - i. This is also required to maintain our certification
 - b. Interface Distributor's License
- 5) Licenses for the SuiteLink product
 - a. Interface Developers License
 - i. This is required to be optional to our customers (will be enforced by Cycle M), our software currently has the ability to use this as an optional product
 - b. Interface Distributor's License

Licenses between Fast Enterprises and its customers:

Because the DPV, LACSLink, and SuiteLink products contain confidential information about real addresses in the US, our customers must agree to protect the USPS data. The Interface Distributor's Licenses above grant Fast the ability to sublicense the rights to our customers, as long as they understand the security measures that must be taken.

There are now two documents that will grant access to these confidential datasets:

- 1) DPV and LACSLink Sublicensing agreement
 - a. This is required to be signed by any site that wishes to use the CASS-certified address validation objects
- 2) SuiteLink Sublicensing agreement
 - a. This is an optional data product to sites that are using our CASS-certified address validation objects

- Send them information about the benefit of using the certified lookup
 - Include the benefits gained from using the DPV and LACSLink products
 - Inform them that the SuiteLink product is also available and its benefits
 - You can use the “Data Product Information” document for this

- There is no extra charge to use the certified validation product and Fast is required to distribute all datasets that the validation process requires (the AIS products, DPV, and LACSLink)
 - Inform them that Fast will be distributing updates to each data product every month
 - If they have a subscription, they may call USPS to cancel

- When they are ready make sure to get contact information for a Fast tech team member (to aid with the initial installation) and a licensing contact from the revenue department. Eventually you will need the name and mailing address of a revenue department contact that will perform the monthly updates.
 - Prepare a copy of the sublicense agreements with the customer name and address typed into the top portion of the document
 - Project managers may sign the sublicense agreement on behalf of Fast before returning the document

- NOTE: The SuiteLink product is optional and the data **must not** be distributed to sites that have not signed the SuiteLink sublicensing agreement

- When a signed agreement has been returned to the Fast office, update the CASS site contacts spreadsheet (including which products they are licensed to use) and give the signed agreement to the accounting department to keep on file.
 - Email the configuration guides to the Fast tech contact
 - Mail a copy of the current data set to the site

For sites using the CASS-certified validation object, aaUSP, there are a few datasets available that provided extended information and can make matches that would be impossible to make otherwise. Over time, the quality of addresses on customer records will improve, meaning fewer returned mail items and more efficient delivery of correspondence.

Delivery Point Validation (DPV)

<https://www.usps.com/business/address-management-products.htm>

<https://ribbs.usps.gov/index.cfm?page=dpv>

This product is able to confirm whether an address is known by the USPS to be receiving mail. It can only answer in a 'yes' or 'no' fashion in order to protect the information contained by the product. But when a 'no' answer is returned, it will also provide extended information about why the submitted address is not a confirmed delivery point (ex: the street number is invalid, or the rural route box number is missing, etc.).

This information is used in two ways:

- 1) During the matching process the DPV information will be used as a tiebreaker in multiple response situations. This will typically happen when the input address is incorrect or incomplete, and will give preference to known delivery points.
- 2) This information will be used when processing addresses during registration and when processing addresses on outgoing mailpieces. When using the certified validation object, we will only report an address as 'verified' when all components of the input address can be DPV confirmed.
 - a. The components integrated into the mail subsystem will also track when a better match is found and provides functionality to continually keep the customer database up to date with the best address available.

LACSLink

<https://www.usps.com/business/address-quality-services.htm>

<https://ribbs.usps.gov/index.cfm?page=lacslink>

This product was originally designed to provide a method for the USPS to convert rural route records to 'city-style' addresses. A rural route address will look something like 'RR 44 Box 350' but because some emergency response systems are unable to process addresses in this format, the USPS has been renaming rural routes with new street names and assigning new number to the houses on those streets.

This is integrated into the lookup process and may change many, if not all, of the components in the street address lines. So a new address may look like '125 Songbird Ln' after being converted through this system. We are required to make the conversions as part of the validation process since the old addressing format will eventually be made obsolete.

Addresses that can be converted through this product are not just limited to rural routes, any address in the USPS database is eligible to be converted and the USPS is also

currently renumbering may PO Boxes in order to make more boxes available to each zip code. The address search control in Gentax will show a notification when an address has been converted using this product.

SuiteLink

<https://ribbs.usps.gov/index.cfm?page=suitelink>

This data product can be used to append missing unit information to business addresses when the input address matches a highrise default record. These records are put in the Zip+4 database to indicate addresses that hold many different delivery points, differentiated by a unit type and number (ex: office buildings and apartment complexes will typically all share the same street name and number, but these can also include strip malls).

This product has a list of business names and their corresponding unit numbers at a matched highrise default record and will use the recipient information provided to search these names. If there is enough confidence in the match the unit information will be returned.

Keep in mind that not every business address will be in the SuiteLink product, but this can provide information that would otherwise be unavailable without contacting the taxpayer.