

THE INFORMATION IN THIS BOX IS NOT A PART OF THE CONTRACT AND IS FOR COUNTY USE ONLY



Contract Number
22-743 A-1

SAP Number

County Administrative Office

Department Contract Representative	<u>Brad Jensen</u>
Telephone Number	<u>909-387-4821</u>
Contractor	<u>Quorum Analytics, Inc.</u>
Contractor Representative	<u>John Schreder</u>
Telephone Number	<u>352-362-9549</u>
Contract Term	<u>June 29, 2022 through June 28, 2027</u>
Original Contract Amount	<u>\$118,884</u>
Amendment Amount	<u>\$10,500</u>
Total Contract Amount	<u>\$129,384</u>
Cost Center	<u>1105001000</u>

Briefly describe the general nature of the contract: Amendment No. 1 to the Subscription Agreement No. 22-743 with Quorum Analytics, Inc., for the purchase of an additional license for the legislative tracking software platform, increasing the renewal cost for three of the four one-year periods by \$3,500 per year, for a total increase of \$10,500, from \$118,884 to \$129,384, beginning June 29, 2024 through June 28, 2027.

FOR COUNTY USE ONLY

Approved as to Legal Form

Cynthia O'Neill
Cynthia O'Neill, Chief Assistant County Counsel

Reviewed for Contract Compliance

Reviewed/Approved by Department

Date _____

Date _____

Date _____



Quorum Analytics, Inc.
 One Thomas Circle NW, 6th Floor
 Washington, DC 20005
 Phone: (202) 972-9980
 Tax ID: 88-2382483

Subscription Order Form

Subscription Details

Client Legal Name:	San Bernardino County, CA
Name of Team Using Quorum:	County of San Bernardino, County Administrative Office
User Cap:	6
Start Date (MM/DD/YYYY):	6/29/2024
End Date (MM/DD/YYYY):	6/28/2027
Payment Terms:	Net 30
Billing Frequency:	Annual

Year 1

Product	Start Date	End Date	Number of States	QTY	Total Price
Quorum Federal	6/29/2024	6/28/2025		1	USD 14,000.00
Quorum Single State	6/29/2024	6/28/2025	1	1	USD 13,183.00
CA					
Quorum Single State Local (Includes Agendas)	6/29/2024	6/28/2025	1	1	USD 0.00
CA					
Year 1 TOTAL:					USD 27,183.00

Year 2

Product	Start Date	End Date	Number of States	QTY	Total Price
Quorum Federal	6/29/2025	6/28/2026		1	USD 14,796.00
Quorum Single State	6/29/2025	6/28/2026	1	1	USD 13,926.00
CA					
Quorum Single State Local (Includes Agendas)	6/29/2025	6/28/2026	1	1	USD 0.00
CA					
Year 2 TOTAL:					USD 28,722.00

Year 3

Product	Start Date	End Date	Number of States	QTY	Total Price
Quorum Federal	6/29/2026	6/28/2027		1	USD 15,644.00
Quorum Single State	6/29/2026	6/28/2027	1	1	USD 14,718.00
CA					
Quorum Single State Local (Includes Agendas)	6/29/2026	6/28/2027	1	1	USD 0.00
CA					
Year 3 TOTAL:					USD 30,362.00

TOTAL: USD 86,267.00

Note: Prices shown above may include one-time discounts and do not include any state and local taxes that may apply. Any such taxes are the responsibility of the Client and will appear on the final invoice.

Terms & Conditions

This Subscription Agreement is governed by the terms and conditions in the Subscription Agreement previously signed by the parties on 6/29/2022.

The parties shall be entitles to sign and transmit an electronic signature of this Agreement (whether by facsimile, PDF, or other email transmission), which signature shall be binding on the party whose name is contained therein. Each party providing an electronic signature agrees to promptly execute and deliver to the other party an original signed Agreement upon request.

Notes:

This order form reflects the addition of 1 new user of Quorum Federal and Ouorum Single State/Single State Local (California) to the existing contract for a term of 36 months and increases the User Cap from 3 to 6. The total number of users upon the start date on this order form is 4.

Billing Information

Bill to (Legal Name): San Bernardino County, CA
Billing Contact: Erika Rodarte
Email: erika.rodarte@cao.sbcounty.gov
Address: 385 N Arrowhead Ave
San Bernardino, CA
92415

Ship to (Legal Name): San Bernardino County, CA
Contact: Bradley Jensen
Email: bradley.jensen@cao.sbcounty.gov
Address: 385 N Arrowhead Ave
San Bernardino, CA
92415

Purchase Order Required (Y/N):

N

Purchase Order Number:

Tax Exempt (Y/N):

Y

If your organization is tax exempt, please send a copy of the tax exemption certificate to accounting@quorum.us

Client and Vendor Authorization

San Bernardino County, CA

Authorized Signer:

Dawn M. Rowe

Date:

JUN 25 2024

Name (Print):

Dawn M. Rowe

Title:

Chair, Board of Supervisors

Quorum Analytics, Inc.

Authorized Signer:

DocuSigned by:
Matt Williams

Date:

6/21/2024

Name (Print): Matt Williams

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Title:

Chief Financial Officer





Campaign Contribution Disclosure (Senate Bill 1439)

DEFINITIONS

Actively supporting the matter: (a) Communicate directly with a member of the Board of Supervisors or other County elected officer [Sheriff, Assessor-Recorder-Clerk, District Attorney, Auditor-Controller/Treasurer/Tax Collector] for the purpose of influencing the decision on the matter; or (b) testifies or makes an oral statement before the County in a proceeding on the matter for the purpose of influencing the County's decision on the matter; or (c) communicates with County employees, for the purpose of influencing the County's decision on the matter; or (d) when the person/company's agent lobbies in person, testifies in person or otherwise communicates with the Board or County employees for purposes of influencing the County's decision in a matter.

Agent: A third-party individual or firm who, for compensation, is representing a party or a participant in the matter submitted to the Board of Supervisors. If an agent is an employee or member of a third-party law, architectural, engineering or consulting firm, or a similar entity, both the entity and the individual are considered agents.

Otherwise related entity: An otherwise related entity is any for-profit organization/company which does not have a parent-subsidary relationship but meets one of the following criteria:

- (1) One business entity has a controlling ownership interest in the other business entity;
- (2) there is shared management and control between the entities; or
- (3) a controlling owner (50% or greater interest as a shareholder or as a general partner) in one entity also is a controlling owner in the other entity.

For purposes of (2), "shared management and control" can be found when the same person or substantially the same persons own and manage the two entities; there are common or commingled funds or assets; the business entities share the use of the same offices or employees, or otherwise share activities, resources, or personnel on a regular basis; or there is otherwise a regular and close working relationship between the entities.

Parent-Subsidiary Relationship: A parent-subsidiary relationship exists when one corporation has more than 50 percent of the voting power of another corporation.

Contractors must respond to the questions on the following page. If a question does not apply respond N/A or Not Applicable.

1. Name of Contractor: **Quorum Analytics, LLC**

2. Is the entity listed in Question No. 1 a non-profit organization under Internal Revenue Code section 501(c)(3)?
 Yes If yes, skip Question Nos. 3 - 4 and go to Question No. 5.
 No

3. Name of Principal (i.e., CEO/President) of entity listed in Question No. 1, if the individual actively supports the matter and has a financial interest in the decision: **N/A**

4. If the entity identified in Question No.1 is a corporation held by 35 or less shareholders, and not publicly traded ("closed corporation"), identify the major shareholder(s): **N/A**

5. Name of any parent, subsidiary, or otherwise related entity for the entity listed in Question No. 1 (see definitions above):

Company Name	Relationship
Quorum Analytics, Inc	Wholly owns the subsidiary, Quorum Analytics, LLC
Phone2Action, Inc. dba Capitol Canary	

6. Name of agent(s) of Contractor:

Company Name	Agent(s)	Date Agent Retained (if less than 12 months prior)
Quorum Analytics, LLC		

7. Name of Subcontractor(s) (including Principal and Agent(s)) that will be providing services/work under the awarded contract if the subcontractor (1) actively supports the matter and (2) has a financial interest in the decision and (3) will be possibly identified in the contract with the County or board governed special district:

Company Name	Subcontractor(s):	Principal and/or Agent(s):

8. Name of any known individuals/companies who are not listed in Questions 1-7, but who may (1) actively support or oppose the matter submitted to the Board and (2) have a financial interest in the outcome of the decision:

Company Name	Individual(s) Name

9. Was a campaign contribution, of more than \$250, made to any member of the San Bernardino County Board of Supervisors or other County elected officer within the prior 12 months, by any of the individuals or entities listed in Question Nos. 1-8?

No If no, please skip Question No. 10. Yes If yes, please continue to complete this form.

10. Name of Board of Supervisor Member or other County elected officer: _____

Name of Contributor: _____

Date(s) of Contribution(s): _____

Amount(s): _____

Please add an additional sheet(s) to identify additional Board Members or other County elected officers to whom anyone listed made campaign contributions.

By signing below, Contractor certifies that the statements made herein are true and correct. Contractor understands that the individuals and entities listed in Question Nos. 1-8 are prohibited from making campaign contributions of more than \$250 to any member of the Board of Supervisors or other County elected officer while this matter is pending and for 12 months after a final decision is made by the County.

DocuSigned by:
Matt Williams
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Signature

Matt Williams

Print Name

6/21/2024

Date

Quorum Analytics

Print Entity Name, if applicable