



Hidalgo County Purchasing Department
2812 S. Business Highway 281
New Administration Building
Edinburg, Texas 78539
(956) 318-2626/ Fax: (956) 318-2629

MEMORANDUM

“SOLE SOURCE DECLARATION”

TO: Hidalgo County Commissioner’s Court

FROM: Martha L. Salazar, CPPB
Hidalgo County Purchasing Agent

DATE: September 29, 2015

RE: “Sole Source Declaration” – Blackbaud Inc.

Hidalgo County Urban County Program is migrating their existing software solution, FundWare (Blackbaud purchased in 2008), to The Financial Edge. The Financial Edge is a solution developed, sold and supported exclusively by Blackbaud.

The Financial Edge is an accounting application designed to address the specific accounting, analytical and financial reporting needs of nonprofit organizations. It also provides the means to help manage fiscal and fiduciary responsibility, enabling nonprofits to be more accountable to their constituents. Blackbaud is the sole owner of any and all intellectual property related to The Financial Edge software program and is the sole provider of this program and related training and consulting services for this program.

Thus, Blackbaud, Inc. is the sole source for The Financial Edge software program.

Therefore, Hidalgo County Urban County Program requires the purchase of The Financial Edge.

This Sole Source Declaration is to remain in effect unless otherwise revoked by Hidalgo County Commissioners Court.

HIDALGO COUNTY PURCHASING DEPARTMENT
SOLE SOURCE AFFIDAVIT

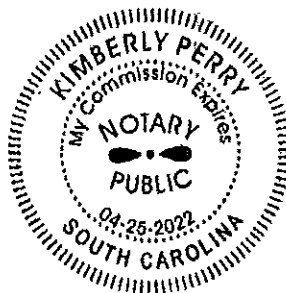
THIS IS AN OFFICIAL PURCHASING DOCUMENT WITH PURCHASE ORDER

Before me, the undersigned official, on this day, personally appeared Scott Cross
(Person's name)
a person known to me to be the person whose signature appears below, whom after being duly sworn upon his/her oath deposed and said:

1. My name is Scott Cross, I am over the age of 18 have never been
(Person's Name)
convicted of crime and am competent to make this affidavit.
2. I am an authorized representative of the following company or firm: Blackbaud, Inc.
(Company's name)
3. The above named company or firm is the sole source for the following item(s), product(s) or service(s).
The Financial Edge
4. Competition in providing the above named item(s), product(s) or service(s) is precluded by the existence of a patent, copyright, secret process or monopoly as stated under section 2626.024(a)(7)(A), of the Local Government Code. Also attached hereto is a sole source letter, which sets forth the reasons why this vendor is a sole source provider (dated and signed).
5. There is/are no other like item(s) or product(s) available for purchase that would serve the same purpose or function.
6. Note: This vendor understands that by providing false information on this Sole Source Affidavit, it may be considered a non-responsible vendor on this and future purchases and may result in discontinuations of any/all business with Hidalgo County.

Signature: Scott Cross

SWORN AND SUBSCRIBED TO under oath before me on 15th day of September 2015.



Kimberly Perry
NOTARY PUBLIC
Kimberly Perry
PRINTED NAME
4/25/2022
MY COMMISSION EXPIRES

COMPANY NAME: _____
ADDRESS (city, state, & zip code): _____
PHONE #: _____ FAX#: _____
CONTACT PERSON AND TITLE: _____
EMAIL ADDRESS: _____



2000 Daniel Island Dr.
Charleston, SC 29492

August 18, 2015

Hidalgo County Urban Program
427 East Duranta Avenue
Suite 107
Alamo, TX 78516
RE: Sole Source Verification

Dear Sir or Madam:

We are pleased that Hidalgo County Urban Program is considering migrating their existing software solution, FundWare (Blackbaud purchased in 2008), to The Financial Edge which is a solution developed, sold and supported by Blackbaud.

Please be advised that Blackbaud is the sole owner of any and all intellectual property related to the software program listed above and is the sole provider of this program and related training and consulting services for this program.

Below are statements of fact about FundWare and the conversion to The Financial Edge:

- Blackbaud purchased Kintera, and Blackbaud is the sole owners of FundWare.
- FundWare is no longer available for purchase. The Financial Edge is Blackbaud's only accounting system available for a new purchase.
- Support for FundWare includes customer support only. Blackbaud is no longer adding further developments or enhancements to the FundWare product.
- The Financial Edge utilizes the current market standard and readily supported technologies. FundWare is not and will not be upgraded to this.
- Blackbaud has converted over 400 FundWare customers to The Financial Edge.
- The data conversion utility to convert FundWare to The Financial Edge proprietary to Blackbaud.
- The conversion services from FundWare to The Financial Edge are proprietary to Blackbaud.

Again, Blackbaud has converted over 400 FundWare customers to The Financial Edge since acquiring the software. This has allowed Blackbaud to streamline the conversion process and to allow the minimal amount of downtime possible compared to other vendors, thus, reducing cost to Hidalgo County Urban Program.

If you have any questions or comments, please do not hesitate to contact me at (843) 654-3294 or by email at Scott.Cross@Blackbaud.com.

Scott Cross
Financial Solutions Sales Manager

Functional Area	The Financial Edge
<ul style="list-style-type: none"> • Terms (up to 2) • Bank Accounts (up to 2) including: <ul style="list-style-type: none"> • Bank Information • Payment Information, including EFT • Cash Management and Adjustments to complete reconciliation as of system go-live • Import of the following: Vendor Records, Open Invoices, 1099 Balances, Outstanding Checks 	
<p>Purchase Orders In addition to the core functional configuration, the consultant will configure each of the following based on initial needs reviewed with you for:</p> <ul style="list-style-type: none"> • Products and Product Categories • Miscellaneous Line Items • Configure one purchase order template • Demonstrate purchasing and encumbrance process • Demonstrate creating asset record through purchasing 	✓
<p>Accounts Receivable and Misc. Cash Receipts Configuration In addition to the core functional configuration, the consultant will configure each of the following based on initial needs reviewed with you:</p> <ul style="list-style-type: none"> • Products/ Billing Items • Statement Information • Interfund sets • Invoice and Statement parameters (one each) • Import of the following: Client records, Payee Relationships, Client Beginning Balances 	✓
<p>Budget Management Configuration In addition to the core functional configuration, the consultant will configure each of the following based on initial needs reviewed with you:</p> <ul style="list-style-type: none"> • Build 1 budget scenario • Import of the following: Current Fiscal Year Budget 	✓
<p>Fixed Assets Configuration In addition to the core functional configuration, the consultant will configure each of the following based on initial needs reviewed with you:</p> <ul style="list-style-type: none"> • Depreciation Schedules and Methods • Classes with Default Posting Information • Default Accounts • Import of the following: Asset Records, Acquisition Transactions, Accumulated Depreciation 	✓

1.1 The Financial Edge NXT Pro Implementation

The **Financial Edge NXT** is a centralized, standardized financial management system that will help improve internal controls, accurately report on complex information, and demonstrate accountability of funding sources, both public and private. The goal of this project is to ensure the successful implementation of **The Financial Edge NXT**.

1.2 Project Approach

The following describes the implementation approach for **The Financial Edge NXT**. For additional information please visit our [Implementation Portal](#).

Project Approach		
Phase	Purpose	Overview of Tasks
Prepare	To ensure a shared understanding of the goals, plan the project implementation, and determine the timeline.	<ul style="list-style-type: none"> • Hold a project kick-off call • Distribute a pre-consultation survey • Confirm the agenda for the project work • Schedule users for product training • Establish a project timeline • Provide import templates and instructions on populating import templates from source data system¹
Review	To discuss the high-level business requirements and current business processes and determine how best to configure the system.	<ul style="list-style-type: none"> • Discuss Chart of Accounts design including projects, grants, and endowments • Discuss General Ledger fund structure • Discuss General Ledger closing methods • Discuss query and reporting needs and obtain sample reports from you
Configure	To configure The Financial Edge NXT based on areas discussed during the Review phase.	<p>Configure the following Functional Areas:</p> <ul style="list-style-type: none"> • Application Hosting Configuration • System Configuration and Administration • Core Functional Configuration • Supporting Module Configuration <p>See Functional Areas section for specific tasks associated with these configuration areas.</p>

¹ You are responsible for extracting data from legacy system and for populating the templates. You will verify accuracy of populated template prior to importing with the Blackbaud consultant

Project Approach		
Wrap Up	To complete the activities required to formally end the implementation project.	<ul style="list-style-type: none"> • Create an engagement summary document that outlines the following: <ul style="list-style-type: none"> • A list of key configuration decisions made • Description of the role and tasks of database administrator • Hold a project wrap-up conference call

1.3 The Financial Edge Functional Areas

Changes to these functional areas can be made by you after implementation. Any changes to the functional areas that require assistance from Blackbaud will result in a Change Order to this Scope of Work.

Functional Area	The Financial Edge
Application Hosting Configuration <ul style="list-style-type: none"> • You will configure Application Hosting security after completing the requisite training 	✓
System Configuration and Administration <ul style="list-style-type: none"> • Configure security, based on pre-configured security by role including View Only access configured for up to 2 users. 	✓
General Ledger Certain configuration choices are already selected, to reflect best practices. The Blackbaud consultant will work with you to select options in the following areas: <ul style="list-style-type: none"> • Business rules • Posting Information • Queries and exports (up to 4 each) • Dashboard Reports (up to 1) • Standard Visual Chart Organizer • Standard Balance Sheet and Income Statement (up to 1 each) • Recurring journal entry templates • Projects and transaction Codes • Fiscal Years • Fund Structure with closing methods and balancing requirements • Account Categories • Account Segments • Import of the following: Account Codes, Accounts, Projects, Beginning Balances 	✓
Accounts Payable Configuration In addition to the core functional configuration, the consultant will configure each of the following based on initial needs reviewed with you: <ul style="list-style-type: none"> • Interfund Sets 	✓



Order Form

The fees and terms quoted in this Order Form ("Order Form") are valid until 9/30/2015. This Order Form and the purchases set forth herein are subject to and governed by the Blackbaud Solutions Agreement available at <https://www.blackbaud.com/files/BlackbaudSolutionsAgreement.pdf> and by signing this Order Form you agree to be bound by the Blackbaud Solutions Agreement(s).

Client Information

Issued to:
Hidalgo Urban County Program

Mailing address:
427 E Duranta Ave Ste 107
Alamo, TX 78516

Principal contact:
Francisco Martinez

Principal contact email:
francisco.martinez@co.hidalgo.tx.us

Client Site ID No.:
31710

Net Terms:
NT15

Bill to:
Hidalgo Urban County Program

Billing address:
427 E Duranta Ave Ste 107
Alamo, TX 78516

Billing contact:
Francisco Martinez

Billing contact email:
francisco.martinez@co.hidalgo.tx.us

Order Form No.:
Q-00087830

Account Executive:
Natalie Phillips

Order Summary

	Year 1	Year 2	Year 3+	Total
Software	\$0.00	\$0.00	\$0.00	\$0.00
Subscriptions	\$3,992.20	\$3,992.20	\$3,992.20	\$11,976.60
Services	\$14,495.00	\$0.00	\$0.00	\$14,495.00
Training	\$3,000.00	\$0.00	\$0.00	\$3,000.00
Maintenance	\$0.00	\$0.00	\$0.00	\$0.00
Total Fees	\$21,487.20	\$3,992.20	\$3,992.20	\$29,471.60

Discounts have been reflected in the order summary above, equaling a total sum of \$(5,987.40)

Signatures

IN WITNESS WHEREOF, the parties have caused this Order Form to be executed by their duly authorized representatives.

AGREED :

Client : Hidalgo Urban County Program

Blackbaud Authorized Signature

By :

Name : Diana R. Serna

Name: Kevin Mooney

Title : Director

Title: President, General Markets Business Unit

Date :

Date: 8/25/2015

(*Effective Date)

All proposed modifications, variations, edits, or additions to this Order Form are objected to and deemed material unless otherwise mutually agreed to in writing.

Subscriptions

Type	Monthly List Price	Adjusted Price	Annual Fees	UoM/Qty	Term Length (months)	Total Fees	Billing
FE:NXT Pro Subscription Offer	\$499.00	\$332.68	\$3,992.20	User/1	36	\$11,976.60	Annual
Subtotal*						\$11,976.60	

Services

Type	List Price	UoM/Qty	Total Fees	Billing
GL Detail Import for FE (2 years)	\$1,800.00	Each/1	\$1,800.00	100% upon completion
Financial Edge Consulting Service FPE	\$12,695.00	Each/1	\$12,695.00	100% upon completion
Subtotal*			\$14,495.00	

Training

Type	List Price	Annual Fees	UoM/Qty	Term Length (months)	Total Fees	Billing
Learn: The Financial Edge More	\$250.00	\$3,000.00	User/3	12	\$3,000.00	Annual
Subtotal*					\$3,000.00	

General Terms

Fees are in USD

Our records indicate that you are Tax Exempt. You will not be charged sales tax on your orders as long as your exemption certificate has not expired. If it has expired, send the new certificate to: SalesTaxExemptCertificates2@blackbaud.com.

Processing of online financial transactions through the Blackbaud offerings purchased on this Order Form is subject to and governed by the <http://www.blackbaud.com/files/bbms/bbpstc.pdf> and by signing this Order Form you agree to be bound by the BBPS Addendum.

The services to be provided are described in the accompanying Statement of Work. Additional Operating Guidelines and General Assumptions applicable to your Statement of Work can be found at <https://www.blackbaud.com/files/sow/BlackbaudProfessionalServicesGuidelinesandAssumptions.pdf>.

The subscription charges listed on this Order Form are for this purchase only. If you currently receive a subscription from Blackbaud, the above charges may be added to those and prorated to coincide with your current maintenance renewal date.

The term of your Subscription commences on the day you execute this Order Form and continues for the duration set forth in the applicable line item above. Subscriptions are billed according to the schedule set forth above.

Your Blackbaud Learn® subscription includes access to self-paced training and specific instructor-led online for everyone at your organization. Instructor-led training is available in the Learn More and Learn Everything subscription tiers only. Classes have minimum attendance requirements and may be rescheduled if those requirements are not met. Please check course schedules frequently. Blackbaud may cancel scheduled classes up to ten (10) days prior to the schedule start of the class for instructor-led classroom training classes and up to three (3) days prior to the scheduled start of the class for instructor-led online training classes. In most instances, a minimum of five (5) attendees per class are required for a class to be held. All available seats are distributed on a first come first served basis. Cancellations, last-minute schedule changes, and no-shows are subject to a fee. Please see our cancellation policy at <https://www.blackbaud.com/nonprofit-training/help/cancellation-policy>. This is a renewable subscription which is billed annually in advance. The term of your subscription commences on the day you execute this ATP and continues for the duration set forth in the applicable line item above.

A description of the services provided for our Hosting and Software as a Service solution is available at <http://www.blackbaud.com/files/maint/HostingSaaSDescription.pdf>. As part of this subscription Blackbaud will provide default storage space as outlined in the Hosting/SaaS Description for each application operated from the Blackbaud data center. Should you need to exceed this allocation for any of the applications operated by Blackbaud, additional space may be purchased in 5 GB increments for a fee of \$1200 per annual period.

Scopes of Work

GL Detail Import for FE (2 years)	www.blackbaud.com/files/sow/ACSFE2GLHISTFPE2YearGLDetailSOWv2.pdf
Financial Edge Consulting Service FPE	See Attached Scope of Work

Zimbra

francisco.martinez@co.hidalgo.tx.us

Updated Financial Edge Proposal

From : Natalie Phillips <Natalie.Phillips@blackbaud.com>**Subject :** Updated Financial Edge Proposal**To :** francisco martinez <francisco.martinez@co.hidalgo.tx.us>

Fri, Jul 24, 2015 03:35 PM

📎 1 attachment

External images are not displayed. [Display images below](#)

Good Afternoon Francisco,

It was nice speaking with you yesterday. I've attached the updated proposal for Financial Edge. This version includes 2 years of detailed GL history (current + previous fiscal year). As discussed, you can spread out your upfront payments so that you don't have to pay all of them when you sign the contract. You will also get a credit on your account for the unused portion of your FundWare maintenance which can be used towards the purchase of Financial Edge.

Hope you have a great weekend and look forward to speaking next week.

Sincerely,

Natalie Phillips

Natalie Phillips**Account Executive - Nonprofit Financial Solutions**

Blackbaud, Inc.

2000 Daniel Island Drive, Charleston, SC 29492

Direct: 843-654-3055 | Mobile: 843-270-6807

Toll Free: 800-443-9441 ext. 3055 | Fax 843-216-6100

natalie.phillips@blackbaud.com | blackbaud.com

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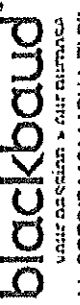
CREDIT
L \$2,328.90/will
VARY DEPENDING
ON THE DATE
CONTACTS ARE
SIGNED. From

Hidalgo Urban County Program - FundWare Maintenance Return

Next required field Next Required

2

- Someone else should sign
- I will not e-sign
- Clear document data
- Download PDF
- Help
- Terms
- Privacy
- Cookies
- Consumer Disclosure
- English US ▼
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- All rights reserved.



Order Form

Client: Hidesgo Urban County Program

Blackbaud Authorized Signature

By:

Kevin Mooney
Name: Kevin Mooney

Name:

Title:

Title: President, General Markets Business Unit

Date:

Date: 8/25/2015

(*Effective Date)

All proposed modifications, variations, edits, or additions to this Order Form are objected to and deemed material unless otherwise mutually agreed to in writing.

Cancelled Software

Type	Price	UoM/Qty	Total Fees	Billing
Fundware Advanced Financial Reporter- Pro	\$0.00	-1	\$0.00	Cancellation
Fundware Accounts Payable - Pro	\$0.00	-1	\$0.00	Cancellation
Fundware Fixed Assets - Pro	\$0.00	-1	\$0.00	Cancellation
Fundware General Ledger - Pro	\$0.00	-1	\$0.00	Cancellation
Fundware Project/Grant - Pro	\$0.00	-1	\$0.00	Cancellation
Fundware Concurrent Users Pro	\$0.00	-1	\$0.00	Cancellation
Subtotal*			\$0.00	

Cancelled Maintenance

Type	Monthly Price	UoM/Qty	Term Length (months)	Total Fees	Billing
MNT for Advanced Financial Reporter- Pro	\$50.19	-1	7	\$(351.33)	Cancellation
MNT for Accounts Payable - Pro	\$50.19	-1	7	\$(351.33)	Cancellation
MNT for Fixed Assets - Pro	\$50.19	-1	7	\$(351.33)	Cancellation
MNT for General Ledger - Pro	\$60.25	-1	7	\$(421.75)	Cancellation
MNT for Project/Grant - Pro	\$40.12	-1	7	\$(280.84)	Cancellation
MNT for Concurrent Users Pro	\$81.76	-1	7	\$(572.32)	Cancellation
Subtotal*				\$(2,328.90)	

Cancellation Terms

The amount(s) listed above represent the reduction on contractual obligation to Blackbaud based on previously signed order documents.

Credits for cancellations associated with this order will be prorated based on the active term of the subscription, product or service being cancelled. Credits for pre-paid amounts will be applied to your account, and can be applied to open invoices per your discretion.

Start

1 / 3

I agree to the [Terms of Use](#) and [Consumer Disclosure](#) of this document



Click to sign

Language: English: US

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Order Form

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Client Information

Issued to:
Hidalgo Urban County Program

Mailing address:
427 E Duranta Ave Ste 107
Alamo, TX 78516

Principal contact:
Francisco Martínez

Principal contact email:
francisco.martinez@co.hidalgo.tx.us

Client Site ID No.:
31710

Net Terms:
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Bill to:
Hidalgo Urban County Program

Billing address:
427 E Duranta Ave Ste 107
Alamo, TX 78516

Billing contact:
Francisco Martínez

Billing contact email:
francisco.martinez@co.hidalgo.tx.us

Order Form No.:
O-00091752

Account Executive:
Natalie Phillips

Cancelled Item Order Summary

	Year 1	Year 2	Year 3+	Total
Software	\$0.00	\$0.00	\$0.00	\$0.00
Subscriptions	\$0.00	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00	\$0.00
Training	\$0.00	\$0.00	\$0.00	\$0.00
Maintenance	\$(2,328.90)	\$0.00	\$0.00	\$(2,328.90)
Total Fees	\$(2,328.90)	\$0.00	\$0.00	\$(2,328.90)

Please review terms regarding credits at end of itemized cancellations.

New Item Order Summary

	Year 1	Year 2	Year 3+	Total
Software	\$0.00	\$0.00	\$0.00	\$0.00
Subscriptions	\$0.00	\$0.00	\$0.00	\$0.00
Services	\$0.00	\$0.00	\$0.00	\$0.00
Training	\$0.00	\$0.00	\$0.00	\$0.00
Maintenance	\$0.00	\$0.00	\$0.00	\$0.00
Total Fees	\$0.00	\$0.00	\$0.00	\$0.00
Grand Total	\$(2,328.90)			

Signatures

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AGREED :

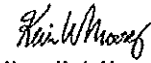
Blackbaud Confidential | 2000 Daniel Island Drive, Charleston, SC 29492

1 of 3

Client: Hidalgo Urban County Program

Blackbaud Authorized Signature

By :



Name :
Diana R. Serna

Name: Kevin Mooney

Title :
Director

Title: President, General Markets Business Unit

Date :
(*Effective Date)

Date: 8/25/2015

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Fundware Project/Grant - Pro	\$0.00	-1	\$0.00	Cancellation
Fundware Concurrent Users Pro	\$0.00	-1	\$0.00	Cancellation
Subtotal*			\$0.00	

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Blackbaud Confidential | 2000 Daniel Island Drive, Charleston, SC 29492

2 of 3

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Enter your job title	
September 11, 2015	

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