

CONTRACT, LEASE, AGREEMENT CONTROL FORM

Date: 01/18/2022

Contract/Lease Control #: C21-3044-BCC

Procurement#: NA

Contract/Lease Type: AGREEMENT

Award To/Lessee: PREDICTIVE INDEX

Owner/Lessor: OKALOOSA COUNTY

Effective Date: 02/01/2022

Expiration Date: 01/31/2023

Description of: PI SOFTWARE

Department: BCC

Department Monitor: HOFSTAD

Monitor's Telephone #: 850-651-7515

Monitor's FAX # or E-mail: JHOFSTAD@MYOKALOOSA.COM

Closed:

Cc: BCC RECORDS

**PROCUREMENT/CONTRACT/LEASE
INTERNAL COORDINATION SHEET**

Procurement/Contract/Lease Number: 021-3044-000 Tracking Number: 4489-20
Procurement/Contractor/Lessee Name: Predictive Index Grant Funded: YES ___ NO X
Purpose: Renewal # 7
Date/Term: 1-30-2023
Department #: 0114
Account #: 531100
Amount: \$3960.00
Department: BCC Dept. Monitor Name: Hofstad

1. GREATER THAN \$100,000
2. GREATER THAN \$50,000
3. \$50,000 OR LESS

Purchasing Review

Procurement or Contract/Lease requirements are met:
DeRita Mason Date: 1-5-22
Purchasing Manager or designee Jeff Hyde, DeRita Mason, Jesica Darr, Angela Etheridge

2CFR Compliance Review (if required)

Approved as written: no federal funds Grant Name: _____
Date: _____
Grants Coordinator Suzanne Ulloa

Risk Management Review

Approved as written: see email attached Date: 1-5-2022
Risk Manager or designee Kristina LoFria

County Attorney Review

Approved as written: see email attached Date: 1-6-2022
County Attorney Lynn Hoshihara, Kerry Parsons or Designee

Department Funding Review

Approved as written: _____ Date: _____

IT Review (if applicable)

Approved as written: _____ Date: _____

DeRita Mason

From: Kristina LoFria
Sent: Wednesday, January 5, 2022 3:38 PM
To: DeRita Mason
Subject: RE: Order Form for Okaloosa County has been sent out for signature to jhyde@myokaloosa.com

DeRita,

This is approved by Risk, no insurance element:

Kristy LoFria

Public Records & Contract Specialist
302 N Wilson St Suite 301
Crestview, Florida 32536
klofria@myokaloosa.com
850-689-5979



For all things Wellness please visit:

<http://www.myokaloosa.com/wellness>

"When the winds of adversity blow against your boat, just adjust your sail."

"Don't aim for success if you want it; just do what you love and believe in, and it will come naturally." David Frost

Please note: Due to Florida's very broad public records laws, most written communications to or from county employees regarding county business are public records, available to the public and media upon request. Therefore, this written e-mail communication, including your e-mail address, may be subject to public disclosure.

From: DeRita Mason <dmason@myokaloosa.com>
Sent: Wednesday, January 5, 2022 11:20 AM
To: Kerry Parsons <kparsons@myokaloosa.com>
Cc: Lynn Hoshihara <lhoshihara@myokaloosa.com>; Kristina LoFria <klofria@myokaloosa.com>
Subject: FW: Order Form for Okaloosa County has been sent out for signature to jhyde@myokaloosa.com

All,
Please review the attached.

Thank you,

DeRita Mason

From: Lynn Hoshihara
Sent: Thursday, January 6, 2022 4:59 PM
To: DeRita Mason; Kerry Parsons
Cc: Kristina LoFria
Subject: Re: Order Form for Okaloosa County has been sent out for signature to jhyde@myokaloosa.com

This is approved.

Lynn M. Hoshihara
County Attorney
Okaloosa County, Florida

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From: DeRita Mason
Sent: Wednesday, January 5, 2022 12:19:37 PM
To: Kerry Parsons
Cc: Lynn Hoshihara; Kristina LoFria
Subject: FW: Order Form for Okaloosa County has been sent out for signature to jhyde@myokaloosa.com

All,
Please review the attached.

Thank you,

DeRita Mason



DeRita Mason, CPF, NIGP-CPP
Senior Contracts and Lease Coordinator
Okaloosa County Purchasing Department
5479A Old Bethel Road
Crestview, Florida 32536
(850) 689-5960
dmason@myokaloosa.com



SINGLE SOURCE PURCHASE JUSTIFICATION REQUEST

A single source means that a commodity or service can be purchased from multiple sources, but, in order to meet certain functional or performance requirements (e.g. parts matching existing equipment or materials) there is only one economically feasible source for the purchase.

Date: 01/05/2022 **PR:** [REDACTED] **Requestor:** John Hofstad **Phone:** 850 651 7515

Department/Division: County Administrator's Office

Item Description: Unlimited job,behavioral and cognitive assessments with access to the Inspire tool,

Vendor: Predictive Index

Vendor's Address: 101 Station Drive, Westwood, MA 02090

Vendor's Telephone No: 850-598-9090

Point of Contact: Bruce Craul

Conditions/Special Circumstances for Single Source Purchase (Continue on blank page as necessary)

A unlimited Behavioral & Cognitive Assessment Tool providing access to the Predictive Index (PI) Design software through a web-based platform. We currently utilize this platform for our administrative and executive band recruitments.

Check One:

- The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation. (Attach emergency condition documentation)
- Federal Awarding Agency or Pass-Through Agency authorizes noncompetitive negotiations (Attach letter of authorization).
- The item is an associated capital maintenance item as defined in 49 U.S.C. §5307(a)(1) that is procured directly from the original manufacturer or supplier of the time to be replaced (price certification attached).
- Other. Additional justification required (Continue on blank page as necessary)

The PI Behavioral Assessment is an untimed, free-choice, stimulus-response tool that is far more than a personality test. For more than 60 years, thousands of businesses around the globe have used our EFPA - certified behavioral assessment to understand the personality traits that make their employees and candidates tick.

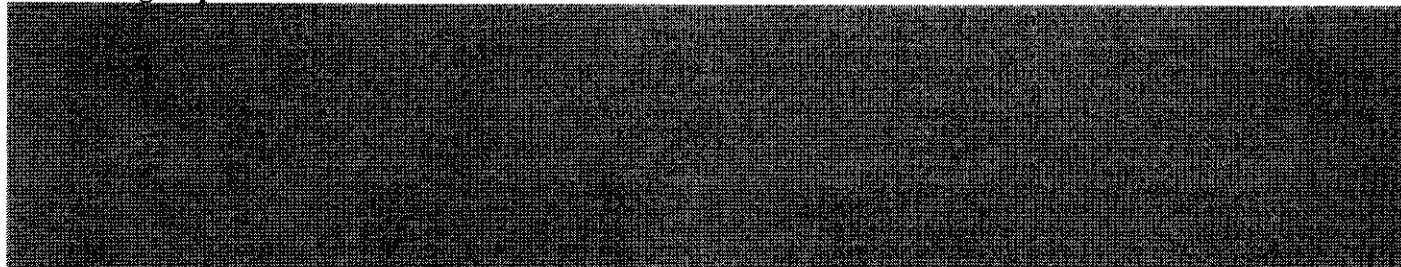
Use the PI Behavioral Assessment to hire candidates who are hardwired to be a great fit, to design teams that perform like magic, and to manage employees in a way that pushes them to perform at the top of

[REDACTED]
Requesting Department Director Signature
(or Designee)

Date

REVIEW BY PURCHASING DEPARTMENT

Purchasing Department Comments:



Approved:

Denied:

Faye Douglas OMB Director

OMB Director Signature

Date



The Predictive Index | Order Form

101 Station Drive, Westwood, MA 02090

Order number : Q-179020

Client Information

Client Name:	OKALOOSA COUNTY	Contact Name: Jeffrey Hyde
Client Address:	Okaloosa County Administration Building 1250 Eglin Parkway N Suite 102 Shalimar, Florida 32579 United States	Phone:
PI Certified Partner:	Hospitality Services Group	Email: jhyde@myokaloosa.com
Client Group:		Partner Consultant: Bruce Craul Key Contact: Jeffrey Hyde

The Key Contact will have full administrative rights to the Client account, and will be the individual designated to make account changes.

Order Details

Start Date:	February 1, 2022	Payment Terms: Net 30
Billing Frequency:	Annually	Employee Headcount: 3
Term:	12 months	

Module	Module Description	Module Tiers	Annual Price	Total Price	Billing Frequency
Design Subscription Plan	Access to PI Design software. Build high-performing teams that deliver results for your business. (Up to 3 Teams).	3 Teams	USD 3,960.00	USD 3,960.00	annual subscription

Totals

Total Subscription Price	USD 3,960.00
Total Order Value	USD 3,960.00

CONTRACT: C21-3044-BCC
PREDICTIVE INDEX
PI SOFTWARE
EXPIRES: 01/31/2023



The Predictive Index | Order Form

101 Station Drive, Westwood, MA 02090

Order number : Q-179020

Client hereby orders from Predictive Index the software described in this order form ("Order Form"). This Order Form is issued under and incorporates the terms of the Client Software Agreement located here: <https://www.predictiveindex.com/terms/>. In the event Client and PI agree to either: (i) any modification of the Client Software Agreement and/or (ii) to any other terms or master agreement, those terms shall control over any conflicting terms in the Client Software Agreement.

NOTE: No agreements or other terms entered into by and between Client and a PI Partner shall apply to the software or PI.

Acknowledged and Accepted

Name: Jeffrey A Hvde
Title: Purchasing Manager
Authority: Manager
Signature: Jeffrey A Hvde
Date Signed: Jan 14, 2022
Tax Exempt Organization: Yes
Exemption Certification Number: 85-9013105818C-2
Purchase Order Required:
Purchase Order Number:

PREDICTIVE INDEX, LLC

Addendum to The Predictive Index Data Processing Agreement Subcontractors and Service Subprocessors as of Jan 4, 2022

Client Name: Okaloosa County
Date: Jan 4, 2022

The below "Service Subprocessors" are independent third-party members of the PI Certified Partner network (and their subcontractors) that help us provide PI products and services to you and provide other PI-related client servicing:

Service Subprocessor	Location of Subprocessor
Hospitality Services Group	Destin, United States

The Predictive Index Data Processing Agreement may be found here:
<https://www.predictiveindex.com/gdpr>.