



Solicitation Number: 061324

CONTRACT

This Contract is between Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Computer Aid, Inc., 1390 Ridgeview Drive, Allentown, PA 18104 (Supplier).

Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that offers cooperative procurement solutions to government entities. Participation is open to eligible federal, state/province, and municipal governmental entities, higher education, K-12 education, nonprofit, tribal government, and other public entities located in the United States and Canada. Sourcewell issued a public solicitation for Staffing with Related Services and Solutions from which Supplier was awarded a contract.

Supplier desires to contract with Sourcewell to provide equipment, products, or services to Sourcewell and the entities that access Sourcewell's cooperative purchasing contracts (Participating Entities).

1. TERM OF CONTRACT

A. **EFFECTIVE DATE.** This Contract is effective upon the date of the final signature below.

EXPIRATION DATE AND EXTENSION. This Contract expires October 24, 2028, unless it is cancelled sooner pursuant to Article 22. This Contract allows up to three additional one-year extensions upon the request of Sourcewell and written agreement by Supplier. Sourcewell retains the right to consider additional extensions beyond seven years as required under exceptional circumstances.

B. **SURVIVAL OF TERMS.** Notwithstanding any expiration or termination of this Contract, all payment obligations incurred prior to expiration or termination will survive, as will the following: Articles 11 through 14 survive the expiration or cancellation of this Contract. All other rights will cease upon expiration or termination of this Contract.

2. EQUIPMENT, PRODUCTS, OR SERVICES

A. EQUIPMENT, PRODUCTS, OR SERVICES. Supplier will provide the Equipment, Products, or Services as stated in its Proposal submitted under the Solicitation Number listed above. Supplier's Equipment, Products, or Services Proposal (Proposal) is attached and incorporated into this Contract.

All Equipment and Products provided under this Contract must be new and the current model. Supplier may offer close-out or refurbished Equipment or Products if they are clearly indicated in Supplier's product and pricing list. Unless agreed to by the Participating Entities in advance, Equipment or Products must be delivered as operational to the Participating Entity's site.

This Contract offers an indefinite quantity of sales, and while substantial volume is anticipated, sales and sales volume are not guaranteed.

B. WARRANTY. Supplier warrants that all Equipment, Products, and Services furnished are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Equipment, Products, and Services are suitable for and will perform in accordance with the ordinary use for which they are intended. Supplier's dealers and distributors must agree to assist the Participating Entity in reaching a resolution in any dispute over warranty terms with the manufacturer. Any manufacturer's warranty that extends beyond the expiration of the Supplier's warranty will be passed on to the Participating Entity.

C. DEALERS, DISTRIBUTORS, AND/OR RESELLERS. Upon Contract execution and throughout the Contract term, Supplier must provide to Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers relative to the Equipment, Products, and Services offered under this Contract, which will be incorporated into this Contract by reference. It is the Supplier's responsibility to ensure Sourcewell receives the most current information.

3. PRICING

All Equipment, Products, or Services under this Contract will be priced at or below the price stated in Supplier's Proposal.

When providing pricing quotes to Participating Entities, all pricing quoted must reflect a Participating Entity's total cost of acquisition. This means that the quoted cost is for delivered Equipment, Products, and Services that are operational for their intended purpose, and includes all costs to the Participating Entity's requested delivery location.

Regardless of the payment method chosen by the Participating Entity, the total cost associated with any purchase option of the Equipment, Products, or Services must always be disclosed in the pricing quote to the applicable Participating Entity at the time of purchase.

A. **SHIPPING AND SHIPPING COSTS.** All delivered Equipment and Products must be properly packaged. Damaged Equipment and Products may be rejected. If the damage is not readily apparent at the time of delivery, Supplier must permit the Equipment and Products to be returned within a reasonable time at no cost to Sourcewell or its Participating Entities. Participating Entities reserve the right to inspect the Equipment and Products at a reasonable time after delivery where circumstances or conditions prevent effective inspection of the Equipment and Products at the time of delivery. In the event of the delivery of nonconforming Equipment and Products, the Participating Entity will notify the Supplier as soon as possible and the Supplier will replace nonconforming Equipment and Products with conforming Equipment and Products that are acceptable to the Participating Entity.

Supplier must arrange for and pay for the return shipment on Equipment and Products that arrive in a defective or inoperable condition.

Sourcewell may declare the Supplier in breach of this Contract if the Supplier intentionally delivers substandard or inferior Equipment or Products.

B. **SALES TAX.** Each Participating Entity is responsible for supplying the Supplier with valid tax-exemption certification(s). When ordering, a Participating Entity must indicate if it is a tax-exempt entity.

C. **HOT LIST PRICING.** At any time during this Contract, Supplier may offer a specific selection of Equipment, Products, or Services at discounts greater than those listed in the Contract. When Supplier determines it will offer Hot List Pricing, it must be submitted electronically to Sourcewell in a line-item format. Equipment, Products, or Services may be added or removed from the Hot List at any time through a Sourcewell Price and Product Change Form as defined in Article 4 below.

Hot List program and pricing may also be used to discount and liquidate close-out and discontinued Equipment and Products as long as those close-out and discontinued items are clearly identified as such. Current ordering process and administrative fees apply. Hot List Pricing must be published and made available to all Participating Entities.

4. PRODUCT AND PRICING CHANGE REQUESTS

Supplier may request Equipment, Product, or Service changes, additions, or deletions at any time. All requests must be made in writing by submitting a signed Sourcewell Price and Product Change Request Form to the assigned Sourcewell Supplier Development Administrator. This approved form is available from the assigned Sourcewell Supplier Development Administrator. At a minimum, the request must:

- Identify the applicable Sourcewell contract number;

- Clearly specify the requested change;
- Provide sufficient detail to justify the requested change;
- Individually list all Equipment, Products, or Services affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
- Include a complete restatement of pricing documentation in Microsoft Excel with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Equipment, Products, and Services offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Contract and will be incorporated by reference.

5. PARTICIPATION, CONTRACT ACCESS, AND PARTICIPATING ENTITY REQUIREMENTS

A. PARTICIPATION. Sourcewell's cooperative contracts are available and open to public and nonprofit entities across the United States and Canada; such as federal, state/province, municipal, K-12 and higher education, tribal government, and other public entities.

The benefits of this Contract should be available to all Participating Entities that can legally access the Equipment, Products, or Services under this Contract. A Participating Entity's authority to access this Contract is determined through its cooperative purchasing, interlocal, or joint powers laws. Any entity accessing benefits of this Contract will be considered a Service Member of Sourcewell during such time of access. Supplier understands that a Participating Entity's use of this Contract is at the Participating Entity's sole convenience and Participating Entities reserve the right to obtain like Equipment, Products, or Services from any other source.

Supplier is responsible for familiarizing its sales and service forces with Sourcewell contract use eligibility requirements and documentation and will encourage potential participating entities to join Sourcewell. Sourcewell reserves the right to add and remove Participating Entities to its roster during the term of this Contract.

B. PUBLIC FACILITIES. Supplier's employees may be required to perform work at government-owned facilities, including schools. Supplier's employees and agents must conduct themselves in a professional manner while on the premises, and in accordance with Participating Entity policies and procedures, and all applicable laws.

6. PARTICIPATING ENTITY USE AND PURCHASING

A. ORDERS AND PAYMENT. To access the contracted Equipment, Products, or Services under this Contract, a Participating Entity must clearly indicate to Supplier that it intends to access this Contract; however, order flow and procedure will be developed jointly between Sourcewell and Supplier. Typically, a Participating Entity will issue an order directly to Supplier or its authorized

subsidiary, distributor, dealer, or reseller. If a Participating Entity issues a purchase order, it may use its own forms, but the purchase order should clearly note the applicable Sourcewell contract number. All Participating Entity orders under this Contract must be issued prior to expiration or cancellation of this Contract; however, Supplier performance, Participating Entity payment obligations, and any applicable warranty periods or other Supplier or Participating Entity obligations may extend beyond the term of this Contract.

Supplier's acceptable forms of payment are included in its attached Proposal. Participating Entities will be solely responsible for payment and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.

B. **ADDITIONAL TERMS AND CONDITIONS/PARTICIPATING ADDENDUM.** Additional terms and conditions to a purchase order, or other required transaction documentation, may be negotiated between a Participating Entity and Supplier, such as job or industry-specific requirements, legal requirements (e.g., affirmative action or immigration status requirements), or specific local policy requirements. Some Participating Entities may require the use of a Participating Addendum, the terms of which will be negotiated directly between the Participating Entity and the Supplier or its authorized dealers, distributors, or resellers, as applicable. Any negotiated additional terms and conditions must never be less favorable to the Participating Entity than what is contained in this Contract.

C. **SPECIALIZED SERVICE REQUIREMENTS.** In the event that the Participating Entity requires service or specialized performance requirements not addressed in this Contract (such as e-commerce specifications, specialized delivery requirements, or other specifications and requirements), the Participating Entity and the Supplier may enter into a separate, standalone agreement, apart from this Contract. Sourcewell, including its agents and employees, will not be made a party to a claim for breach of such agreement.

D. **TERMINATION OF ORDERS.** Participating Entities may terminate an order, in whole or in part, immediately upon notice to Supplier in the event of any of the following events:

1. The Participating Entity fails to receive funding or appropriation from its governing body at levels sufficient to pay for the equipment, products, or services to be purchased; or
2. Federal, state, or provincial laws or regulations prohibit the purchase or change the Participating Entity's requirements.

E. **GOVERNING LAW AND VENUE.** The governing law and venue for any action related to a Participating Entity's order will be determined by the Participating Entity making the purchase.

7. CUSTOMER SERVICE

A. PRIMARY ACCOUNT REPRESENTATIVE. Supplier will assign an Account Representative to Sourcwell for this Contract and must provide prompt notice to Sourcwell if that person is changed. The Account Representative will be responsible for:

- Maintenance and management of this Contract;
- Timely response to all Sourcwell and Participating Entity inquiries; and
- Business reviews to Sourcwell and Participating Entities, if applicable.

B. BUSINESS REVIEWS. Supplier must perform a minimum of one business review with Sourcwell per contract year. The business review will cover sales to Participating Entities, pricing and contract terms, administrative fees, sales data reports, performance issues, supply issues, customer issues, and any other necessary information.

8. REPORT ON CONTRACT SALES ACTIVITY AND ADMINISTRATIVE FEE PAYMENT

A. CONTRACT SALES ACTIVITY REPORT. Each calendar quarter, Supplier must provide a contract sales activity report (Report) to the Sourcwell Supplier Development Administrator assigned to this Contract. Reports are due no later than 45 days after the end of each calendar quarter. A Report must be provided regardless of the number or amount of sales during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;
- Sourcwell Assigned Entity/Participating Entity Number;
- Item Purchased Description;
- Item Purchased Price;
- Sourcwell Administrative Fee Applied; and
- Date Purchase was invoiced/sale was recognized as revenue by Supplier.

B. ADMINISTRATIVE FEE. In consideration for the support and services provided by Sourcwell, the Supplier will pay an administrative fee to Sourcwell on all Equipment, Products, and Services provided to Participating Entities. The Administrative Fee must be included in, and not added to, the pricing. Supplier may not charge Participating Entities more than the contracted

price to offset the Administrative Fee.

The Supplier will submit payment to Sourcewell for the percentage of administrative fee stated in the Proposal multiplied by the total sales of all Equipment, Products, and Services purchased by Participating Entities under this Contract during each calendar quarter. Payments should note the Supplier's name and Sourcewell-assigned contract number in the memo; and must be mailed to the address above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions. Payments must be received no later than 45 calendar days after the end of each calendar quarter.

Supplier agrees to cooperate with Sourcewell in auditing transactions under this Contract to ensure that the administrative fee is paid on all items purchased under this Contract.

In the event the Supplier is delinquent in any undisputed administrative fees, Sourcewell reserves the right to cancel this Contract and reject any proposal submitted by the Supplier in any subsequent solicitation. In the event this Contract is cancelled by either party prior to the Contract's expiration date, the administrative fee payment will be due no more than 30 days from the cancellation date.

9. AUTHORIZED REPRESENTATIVE

Sourcewell's Authorized Representative is its Chief Procurement Officer.

Supplier's Authorized Representative is the person named in the Supplier's Proposal. If Supplier's Authorized Representative changes at any time during this Contract, Supplier must promptly notify Sourcewell in writing.

10. AUDIT, ASSIGNMENT, AMENDMENTS, WAIVER, AND CONTRACT COMPLETE

A. **AUDIT.** Pursuant to Minnesota Statutes Section 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Contract are subject to examination by Sourcewell or the Minnesota State Auditor for a minimum of six years from the end of this Contract. This clause extends to Participating Entities as it relates to business conducted by that Participating Entity under this Contract.

B. **ASSIGNMENT.** Neither party may assign or otherwise transfer its rights or obligations under this Contract without the prior written consent of the other party and a fully executed assignment agreement. Such consent will not be unreasonably withheld. Any prohibited assignment will be invalid.

C. **AMENDMENTS.** Any amendment to this Contract must be in writing and will not be effective until it has been duly executed by the parties.

D. **WAIVER.** Failure by either party to take action or assert any right under this Contract will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right. Any such waiver must be in writing and signed by the parties.

E. **CONTRACT COMPLETE.** This Contract represents the complete agreement between the parties. No other understanding regarding this Contract, whether written or oral, may be used to bind either party. For any conflict between the attached Proposal and the terms set out in Articles 1-22 of this Contract, the terms of Articles 1-22 will govern.

F. **RELATIONSHIP OF THE PARTIES.** The relationship of the parties is one of independent contractors, each free to exercise judgment and discretion with regard to the conduct of their respective businesses. This Contract does not create a partnership, joint venture, or any other relationship such as master-servant, or principal-agent.

11. INDEMNITY AND HOLD HARMLESS

Supplier must indemnify, defend, save, and hold Sourcewell and its Participating Entities, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell or its Participating Entities, arising out of any act or omission in the performance of this Contract by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in the Equipment, Products, or Services under this Contract to the extent the Equipment, Product, or Service has been used according to its specifications. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

12. GOVERNMENT DATA PRACTICES

Supplier and Sourcewell must comply with the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13, as it applies to all data provided by or provided to Sourcewell under this Contract and as it applies to all data created, collected, received, maintained, or disseminated by the Supplier under this Contract.

13. INTELLECTUAL PROPERTY, PUBLICITY, MARKETING, AND ENDORSEMENT

A. INTELLECTUAL PROPERTY

1. *Grant of License.* During the term of this Contract:

- a. Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising and promotional materials for the purpose of marketing Sourcewell's relationship with Supplier.

b. Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising and promotional materials for the purpose of marketing Supplier's relationship with Sourcewell.

2. *Limited Right of Sublicense.* The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, and agents (collectively "Permitted Sublicensees") in advertising and promotional materials for the purpose of marketing the Parties' relationship to Participating Entities. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this Article by any of their respective sublicensees.

3. *Use; Quality Control.*

a. Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.

b. Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Upon written notice to the breaching party, the breaching party has 30 days of the date of the written notice to cure the breach or the license will be terminated.

4. *Termination.* Upon the termination of this Contract for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

B. **PUBLICITY.** Any publicity regarding the subject matter of this Contract must not be released without prior written approval from the Authorized Representatives. Publicity includes notices, informational pamphlets, press releases, research, reports, signs, and similar public notices prepared by or for the Supplier individually or jointly with others, or any subcontractors, with respect to the program, publications, or services provided resulting from this Contract.

C. **MARKETING.** Any direct advertising, marketing, or offers with Participating Entities must be approved by Sourcewell. Send all approval requests to the Sourcewell Supplier Development Administrator assigned to this Contract.

D. **ENDORSEMENT.** The Supplier must not claim that Sourcewell endorses its Equipment, Products, or Services.

14. GOVERNING LAW, JURISDICTION, AND VENUE

The substantive and procedural laws of the State of Minnesota will govern this Contract. Venue for all legal proceedings arising out of this Contract, or its breach, must be in the appropriate state court in Todd County, Minnesota or federal court in Fergus Falls, Minnesota.

15. FORCE MAJEURE

Neither party to this Contract will be held responsible for delay or default caused by acts of God or other conditions that are beyond that party's reasonable control. A party defaulting under this provision must provide the other party prompt written notice of the default.

16. SEVERABILITY

If any provision of this Contract is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Contract is capable of being performed, it will not be affected by such determination or finding and must be fully performed.

17. PERFORMANCE, DEFAULT, AND REMEDIES

A. **PERFORMANCE.** During the term of this Contract, the parties will monitor performance and address unresolved contract issues as follows:

1. *Notification.* The parties must promptly notify each other of any known dispute and work in good faith to resolve such dispute within a reasonable period of time. If necessary, Sourcewell and the Supplier will jointly develop a short briefing document that describes the issue(s), relevant impact, and positions of both parties.
2. *Escalation.* If parties are unable to resolve the issue in a timely manner, as specified above, either Sourcewell or Supplier may escalate the resolution of the issue to a higher level of management. The Supplier will have 30 calendar days to cure an outstanding issue.
3. *Performance while Dispute is Pending.* Notwithstanding the existence of a dispute, the Supplier must continue without delay to carry out all of its responsibilities under the Contract that are not affected by the dispute. If the Supplier fails to continue without delay to perform its responsibilities under the Contract, in the accomplishment of all undisputed work, the Supplier will bear any additional costs incurred by Sourcewell and/or its Participating Entities as a result of such failure to proceed.

B. **DEFAULT AND REMEDIES.** Either of the following constitutes cause to declare this Contract, or any Participating Entity order under this Contract, in default:

1. Nonperformance of contractual requirements, or
2. A material breach of any term or condition of this Contract.

The party claiming default must provide written notice of the default, with 30 calendar days to cure the default. Time allowed for cure will not diminish or eliminate any liability for liquidated or other damages. If the default remains after the opportunity for cure, the non-defaulting party may:

- Exercise any remedy provided by law or equity, or
- Terminate the Contract or any portion thereof, including any orders issued against the Contract.

18. INSURANCE

A. REQUIREMENTS. At its own expense, Supplier must maintain insurance policy(ies) in effect at all times during the performance of this Contract with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:

1. *Workers' Compensation and Employer's Liability.*

Workers' Compensation: As required by any applicable law or regulation.

Employer's Liability Insurance: must be provided in amounts not less than listed below:

Minimum limits:

\$500,000 each accident for bodily injury by accident

\$500,000 policy limit for bodily injury by disease

\$500,000 each employee for bodily injury by disease

2. *Commercial General Liability Insurance.* Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office ("ISO") Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Contract.

Minimum Limits:

\$1,000,000 each occurrence Bodily Injury and Property Damage

\$1,000,000 Personal and Advertising Injury

\$2,000,000 aggregate for products liability-completed operations

\$2,000,000 general aggregate

3. *Commercial Automobile Liability Insurance.* During the term of this Contract, Supplier will maintain insurance covering all owned, hired, and non-owned automobiles in limits of liability not less than indicated below. The coverage must be subject to terms

no less broad than ISO Business Auto Coverage Form CA 0001 (2010 edition or newer), or equivalent.

Minimum Limits:

\$1,000,000 each accident, combined single limit

4. *Umbrella Insurance*. During the term of this Contract, Supplier will maintain umbrella coverage over Employer's Liability, Commercial General Liability, and Commercial Automobile.

Minimum Limits:

\$2,000,000

5. *Professional/Technical, Errors and Omissions, and/or Miscellaneous Professional Liability*. During the term of this Contract, Supplier will maintain coverage for all claims the Supplier may become legally obligated to pay resulting from any actual or alleged negligent act, error, or omission related to Supplier's professional services required under this Contract.

Minimum Limits:

\$2,000,000 per claim or event

\$2,000,000 – annual aggregate

6. *Network Security and Privacy Liability Insurance*. During the term of this Contract, Supplier will maintain coverage for network security and privacy liability. The coverage may be endorsed on another form of liability coverage or written on a standalone policy. The insurance must cover claims which may arise from failure of Supplier's security resulting in, but not limited to, computer attacks, unauthorized access, disclosure of not public data – including but not limited to, confidential or private information, transmission of a computer virus, or denial of service.

Minimum limits:

\$2,000,000 per occurrence

\$2,000,000 annual aggregate

Failure of Supplier to maintain the required insurance will constitute a material breach entitling Sourcwell to immediately terminate this Contract for default.

B. CERTIFICATES OF INSURANCE. Prior to commencing under this Contract, Supplier must furnish to Sourcwell a certificate of insurance, as evidence of the insurance required under this Contract. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcwell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or sent to the Sourcwell Supplier Development Administrator assigned to this Contract. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf.

Failure to request certificates of insurance by Sourcewell, or failure of Supplier to provide certificates of insurance, in no way limits or relieves Supplier of its duties and responsibilities in this Contract.

C. **ADDITIONAL INSURED ENDORSEMENT AND PRIMARY AND NON-CONTRIBUTORY INSURANCE CLAUSE.** Supplier agrees to list Sourcewell and its Participating Entities, including their officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.

D. **WAIVER OF SUBROGATION.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Contract or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

E. **UMBRELLA/EXCESS LIABILITY/SELF-INSURED RETENTION.** The limits required by this Contract can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

19. COMPLIANCE

A. **LAWS AND REGULATIONS.** All Equipment, Products, or Services provided under this Contract must comply fully with applicable federal laws and regulations, and with the laws in the states and provinces in which the Equipment, Products, or Services are sold.

B. **LICENSES.** Supplier must maintain a valid and current status on all required federal, state/provincial, and local licenses, bonds, and permits required for the operation of the business that the Supplier conducts with Sourcewell and Participating Entities.

20. BANKRUPTCY, DEBARMENT, OR SUSPENSION CERTIFICATION

Supplier certifies and warrants that it is not in bankruptcy or that it has previously disclosed in writing certain information to Sourcewell related to bankruptcy actions. If at any time during this Contract Supplier declares bankruptcy, Supplier must immediately notify Sourcewell in writing.

Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government or the Canadian government, as applicable; or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Contract. Supplier further warrants that it will provide immediate written notice to Sourcwell if this certification changes at any time.

21. PROVISIONS FOR NON-UNITED STATES FEDERAL ENTITY PROCUREMENTS UNDER UNITED STATES FEDERAL AWARDS OR OTHER AWARDS

Participating Entities that use United States federal grant or FEMA funds to purchase goods or services from this Contract may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Article, all references to “federal” should be interpreted to mean the United States federal government. The following list only applies when a Participating Entity accesses Supplier’s Equipment, Products, or Services with United States federal funds.

A. **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all contracts that meet the definition of “federally assisted construction contract” in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. §60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 C.F.R. § 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.” The equal opportunity clause is incorporated herein by reference.

B. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with

the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must be in compliance with all applicable Davis-Bacon Act provisions.

C. CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708). Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Contract. Supplier certifies that during the term of an award for all contracts by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

D. RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT. If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier certifies that during the term of an award for all contracts by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

E. CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387). Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

Supplier certifies that during the term of this Contract will comply with applicable requirements as referenced above.

F. DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689). A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. §180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

G. BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352). Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

H. RECORD RETENTION REQUIREMENTS. To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

I. ENERGY POLICY AND CONSERVATION ACT COMPLIANCE. To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

J. BUY AMERICAN PROVISIONS COMPLIANCE. To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

K. ACCESS TO RECORDS (2 C.F.R. § 200.336). Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and

records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.

L. **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

M. **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.

N. **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Contract or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Contract or any purchase by an authorized user.

O. **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Contract or any purchase by a Participating Entity.

P. **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.

Q. **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Contract or any aspect related to the anticipated work under this Contract raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

R. U.S. EXECUTIVE ORDER 13224. The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.

S. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT. To the extent applicable, Supplier certifies that during the term of this Contract it will comply with applicable requirements of 2 C.F.R. § 200.216.

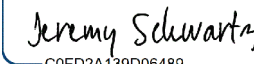
T. DOMESTIC PREFERENCES FOR PROCUREMENTS. To the extent applicable, Supplier certifies that during the term of this Contract will comply with applicable requirements of 2 C.F.R. § 200.322.

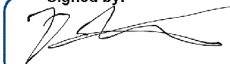
22. CANCELLATION

Sourcewell or Supplier may cancel this Contract at any time, with or without cause, upon 60 days' written notice to the other party. However, Sourcewell may cancel this Contract immediately upon discovery of a material defect in any certification made in Supplier's Proposal. Cancellation of this Contract does not relieve either party of financial, product, or service obligations incurred or accrued prior to cancellation.

Sourcewell

Computer Aid, Inc.

Signed by:

By: C0FD2A139D06489...
Jeremy Schwartz
Title: Chief Procurement Officer
Date: 10/23/2024 | 1:27 PM CDT

Signed by:

By: 2822B073E271448...
D. Abraham Hunter
Title: Executive Vice President
Date: 10/23/2024 | 12:12 PM CDT

RFP 061324 - Staffing with Related Services and Solutions

Vendor Details

Company Name: Computer Aid, Inc
Does your company conduct business under any other name? If yes, please state: CAI
Address: 1390 Ridgeview Drive
Allentown, Pennsylvania 18104
Contact: Linda Leiby
Email: Linda.Leiby@cai.io
Phone: 570-337-8698
HST#: 23-2180878

Submission Details

Created On: Thursday April 25, 2024 07:43:15
Submitted On: Thursday June 13, 2024 10:08:02
Submitted By: Carly Gassert
Email: CAI.Proposals@cai.io
Transaction #: a02d7a72-8972-4dff-8e24-005c9417f820
Submitter's IP Address: 104.225.171.8

Specifications

Table 1: Proposer Identity & Authorized Representatives

General Instructions (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond "N/A" if the question does not apply to you (preferably with an explanation).

Line Item	Question	Response *
1	Proposer Legal Name (one legal entity only): (In the event of award, will execute the resulting contract as "Supplier").	Computer Aid, Inc. (CAI)
2	Identify all subsidiary entities of the Proposer whose equipment, products, or services are included in the Proposal.	N/A
3	Identify all applicable assumed names or DBA names of the Proposer or Proposer's subsidiaries in Line 1 or Line 2 above.	CAI has operated as Computer Aid, Inc. (CAI) for its entire history. However, when the name Computer Aid, Inc., was already in use in certain locations, we had to register with an alternate name, shown below: Arkansas: CAII, Inc. Maryland: C.A. Systems Company A/K/A Computer Aid, Inc. Minnesota: CAI, Inc. New Hampshire: Computer Aid, Inc. dba CAII New Jersey: Computer Aid, Inc. dba CAII, Inc. New York: CAII Texas: Computer Aid, Inc. dba CA Systems, Inc.
4	Provide your CAGE code or Unique Entity Identifier (SAM):	1K8V3
5	Proposer Physical Address:	1390 Ridgeview Drive, Allentown PA 18104
6	Proposer website address (or addresses):	www.cai.io
7	Proposer's Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the "Proposer's Assurance of Compliance" on behalf of the Proposer and, in the event of award, will be expected to execute the resulting contract):	D. Abraham Hunter, Executive Vice President 1390 Ridgeview Drive, Allentown, PA 18104 Abe.Hunter@cai.io (717) 651-3070
8	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Gabriela Feliciano, Vice President, Public Sector 10 S LaSalle Street, Ste 1000, Chicago, IL 60603 Gabriela.Feliciano@cai.io (773) 627-3163
9	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Linda Leiby, Director, MSP CWS Programs Office 1390 Ridgeview Drive, Allentown, PA 18104 Linda.Lieby@cai.io (717) 651-3080 Cynthia Sullivan, Executive Director, Public Sector CWS Programs Office 1390 Ridgeview Drive, Allentown, PA 18104 Cynthia.Sullivan@cai.io (804) 912-7962

Table 2: Company Information and Financial Strength

Line Item	Question	Response *
10	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested equipment, products or services.	CAI is a global technology and business services firm with more than 8,700 associates worldwide and annual revenue of \$1.2B in 2022. For more than 40 years we have partnered strategically with our clients to help them achieve full business potential, using a broad spectrum of modern tools and methods to address their most complex business challenges. CAI's Public Sector division has been supporting state, city, local government, and education since 1991 and

accounts for more than 89% of CAI's annual revenue, with 18 of our top 25 clients being public sector; see Attachment B – Graphics Book; Figure 1 – Public Sector Clients. CAI's consulting practices and delivery centers provide tailored solutions and managed services that create lasting value across our clients' applications and IT infrastructures. We are a diverse and innovative global team known for providing right-sized strategy, solutions, and ongoing support for our clients.

CAI has been a prime vendor on the Sourcwell Managed Service Provider (MSP) for Information Technology (IT) contract since 2017. We have enrolled 42 Participating Entities nationwide and, with Sourcwell's collaboration, have enrolled the State of Iowa as a state-level participant in the Sourcwell program. This program has generated \$64.4M in revenue to date and an additional \$85.4M for the State of Iowa program. Since its inception, our Contingent Workforce Services (CWS) portfolio has generated revenues over \$2.6 billion following the same best practices that Sourcwell and its Members receive under the current contract and will continue to do so under a new agreement.

CAI delivers a wide array of staffing and solution-based services throughout the United States (U.S.) and Canada. In response to this Request for Proposal (RFP), we will focus specifically on our CWS practice. Recognized as an industry leader, particularly in the Public Sector, we have extensive qualifications in managing state-wide MSP. Our MSPs offer comprehensive labor services, catering to a broad spectrum of staffing needs including professional services, IT, accounting, executive search, procurement, clerical work, legal support, healthcare, vendor management systems (VMS), recruitment, food and beverage, light industrial, insurance, and education. Our programs are designed to facilitate both Time & Materials (T&M) and Project-based engagements, encompassing staff augmentation, Statement of Work (SOW), and Operations & Maintenance.

CAI has a nationwide Contractor pool to support the Sourcwell program as it expands into the new contract. Across our programs, we have enrolled thousands of local, regional, and national Contractors utilizing subcontractor agreements (SAs) customized to each program, including Sourcwell's current program. These agreements ensure adherence to each customers' contractual requirements and business rules while enabling our customers to also meet their diversity goals. We have proven both our willingness and ability to be flexible and agile, adapting our workflows and processes to meet each of our customers' individual objectives while maintaining our tested strategies and established practices for contingent workforce management. These specific SAs have been heavily utilized for our current Sourcwell contract. With each new participating entity or Member (used interchangeably throughout our response), we have had to adapt to Member's specific procurement guidelines, state and local guidelines, as well as the unique service levels and management expectations placed on CAI throughout the engagement. CAI has carried this requirement successfully.

As a purpose-driven organization, CAI also fosters a work environment to support persons with disabilities. For decades, this initiative has included providing accommodation for persons with physical disabilities (e.g., mobility and hearing impairment). Since 2013, we have focused on working with partners to provide training and career opportunities for neurodiverse individuals. In 2020, we became an original signatory of the "CEO Letter on Disability Inclusion" and registered to participate in the Disability Equality Index (DEI). Sponsored by the American Association of People with Disabilities (AAPD) and Disability:IN, the DEI is a benchmarking tool designed to measure corporate programs and policies that enable persons with disabilities to be effective in the workplace. As a signatory, we are committed to participating in the DEI in the years to come, maintaining a positive impact on the unemployment and underemployment of people with disabilities and continuing to disseminate disability-inclusion information and its impact on business performance so that employees and other employers understand the value that individuals with disabilities bring to the workplace. In 2021, the DEI included 319 U.S. firms; by 2022, it included 485 firms, including more than 70 Fortune 100 participants. We are pleased to note we achieved the maximum 100 percent score on the DEI in all three years.

In 2022, we were ranked among the "Best Employers for Diversity" by Forbes. Forbes partnered with market research company Statista to survey 60,000 Americans working for businesses with at least 1,000 employees and pinpoint the companies they identified as most dedicated to diversity, equity, and inclusion. When compiling the list, the diversity of corporations' boards and executive ranks were considered, as were diversity, equity, and inclusion initiatives and recent allegations or unresolved lawsuits related to workplace diversity.

For the second consecutive year, CAI has been named as one of Newsweek's "America's Greatest Workplaces for Diversity 2024," with a complete five-star rating. Newsweek surveyed 350,000 employees of more than 1,000 companies across the U.S. and developed a score based on the anonymous

surveys, interviews with HR professionals, and publicly available information. CAI was one of 72 firms in the technology category to score a perfect 5-star Diversity Score.

In cooperation with Plant-A Insights Group, Newsweek scored 1,000 companies across the U.S. for their value of diversity in their workplaces. The rankings are based on publicly available data, interviews with Human Resources professionals, and an anonymous online survey that yielded over 350,000 company reviews. Respondents answered questions on corporate culture, working environment, proactive management of diverse workforce, and more. The participants provided both direct recommendations for their own employer and indirect recommendations for other employers.

In addition, we have a Neurodiverse Solutions business practice. This initiative is a partnership between CAI, community outreach, neurodiversity support organizations, and a collection of forward-minded businesses who are interested in creating meaningful diversity in their workplaces.

Neurodiverse Solutions helps private and public organizations drive value, improve productivity, and enhance the customer experience by realizing the benefits of neurodiversity. CAI manages not only the recruitment, selection, and hands-on training of team members, but also the cultural integration, on-the-job supervision, skill development, and ongoing performance management. The program primarily supports high functioning and semi-skilled individuals who are eager to enter a work environment that values their contributions and supports their needs. In many cases, our associates have college degrees in IT and engineering. CAI is a pioneer in neurodiversity and currently one of the largest employers of neurodiverse individuals in the U.S.

<p>11</p>	<p>What are your company's expectations in the event of an award?</p>	<p>CAI recognizes the need for this procurement contract and would be honored to support its intent and deployment. Having provided large, managed staffing and solutions programs nationally for over 20 years, CAI has seen increased breadth for contingent workforce consolidation, and thus, contracts to support these wide-ranging programs are needed. Contingent Workforce management programs that started as only IT services, or only professional or healthcare-centric services, have now grown to be all inclusive of labor and staffing across organizations. Since we are currently managing this style of contract and program services, we are ready with existing plans, templates, and infrastructure to meet immediate needs and quickly go to market.</p> <p>Our post-award planning starts with Contract Kickoff meetings. This step will finalize all contractual documentation between Sourcewell and CAI. New contractual requirements may become part of flow down terms to existing Members, and users of the program, under the Participating Addendum. We will review the Marketing Plan (see Attachment A - Marketing Plan) to discuss the proposed outreach to new and existing Members, as well as adjust anything that may be required.</p> <p>The Marketing Plan plays a key role in long-term program success so that CAI may collaborate with Sourcewell to ensure needs are met, appropriate demographics are targeted, and valuable services are provided to Members. We will conclude the sessions with an understanding of Sourcewell's specific participation and activities to promote the program, the relevant Points of Contact (POCs), and the immediate and long-term goals established for the program.</p> <p>The Contract Kickoff meeting will be scheduled after award and will include a formal agenda with key CAI personnel. Following the meeting, CAI will provide minutes and document any key decisions that may form part of the contract agreement.</p> <p>The second task is developing and conducting Communications. As a current Sourcewell supplier, we have the relationships in place with existing members, and we will work with our current Participating Entities to make them aware of this new award and service.</p> <p>The final task will be updating sales training for CAI staff. Training will be provided to this team for any new requirements based upon the agreed contract, as well as any changes within Sourcewell that can be a 'benefit' shared in the sales process.</p> <p>To summarize, key tasks include:</p> <ul style="list-style-type: none"> • Contract kickoff meeting with Sourcewell • Finalize contract documents and terms • Review Marketing Plan • Discuss Sourcewell participation and activities • Communication to existing participating entities • Alert participating entities to the new contract award • Discuss steps to move to new contract • Communication to potential participating entities • Update websites and documentation referencing new contract • Kick off marketing efforts announcing new contract • Training • Develop and conduct training on the new Sourcewell contract for CAI sales staff <p>At CAI, we take immense pride in the work we do and the successful outcomes we deliver for our clients. To this end, if awarded a contract, we request your agreement to allow us to feature your project as a reference. This will help us demonstrate our capabilities and expertise, while also showcasing the trust and satisfaction our clients have in our services. References will be handled with utmost discretion and respect for your organization.</p>
<p>12</p>	<p>Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response.</p>	<p>CAI has provided two years of its most recent financial statements; please see Attachment H – Audited Financials.</p>

13	What is your US market share for the solutions that you are proposing?	<p>As of April 2024, CAI has 20%+ market share of potential state-level MSP business. CAI currently provides MSP and Contingent Workforce Management services as a prime contractor to the following 11 of 50 states and to the Washington Metropolitan Area Transit Authority (WMATA) entity:</p> <ul style="list-style-type: none"> • Commonwealth of Virginia • State of North Carolina • State of Georgia • State of Idaho • State of Indiana • State of New Jersey • District of Columbia • State of Iowa (delivered under the Sourcewell contract) • State of Arkansas • State of Florida • Washington Metropolitan Area Transit Authority <p>Currently, CAI is onboarding Hawaii, Connecticut, New Mexico, and North Dakota to our MSP portfolio. In addition to our state-level engagements, CAI proudly serves as the prime contractor for Sourcewell's nationwide MSP for IT contract #071321-CAI.</p> <p>These instances clearly demonstrate that CAI commands a substantial presence in the Public Sector MSP market, backed by a wealth of expertise that enables the delivery of robust staffing and service solutions. Our track record of successful partnerships and the consistent fulfillment of client needs speak to our deep understanding of the industry and our ability to adapt to its evolving demands. With a commitment to excellence and innovation, CAI stands out as a leader, continuously striving to exceed expectations and drive value for our clients. As we look to the future, we have newly invested resources and are poised to maintain and expand our market share, ensuring that we remain at the forefront of providing top-tier MSP services and solutions tailored to the unique challenges of our customers.</p>
14	What is your Canadian market share for the solutions that you are proposing?	CAI has provided staffing services to Canadian entities; however, we do not provide a full MSP service to a Canadian entity at present.
15	Has your business ever petitioned for bankruptcy protection? If so, explain in detail.	No
16	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer whichever question (either a) or b) just below) best applies to your organization.</p> <p>a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned?</p> <p>b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>CAI is best described as a service provider. The following describes our CAI Sales Staff, Supplier and Candidate Network, and Account Management services, and how they will perform on behalf of Sourcewell, ensuring the Members achieve their goals and are driven by best practices for great results. With over \$16.3M in current staff augmentation and SOW sales supporting Members through the Sourcewell contract, CAI is confident we have our approach correct in the initial contract term and look forward to building upon it further.</p> <p>CAI Sales & Service Staff CAI is a leading provider of Contingent Workforce services, as well as Staffing and Solutions based services, to nationwide public sector clients. CAI views all staff that form part of our leadership forum as growth oriented. These individuals are part of our Sales & Service staff, who are focused on expanding our reach in the market and the Sourcewell contract; over 200 advocates for the Sourcewell program promise strong growth. CAI has offices in 11 cities and is registered to do business in 47 states. We have international offices in India and the Philippines. Our head office is in Allentown, PA. Our full-time staff is based nationwide, which allows us to have a good 'feel' for local market conditions when supporting our clients.</p> <p>CWS: Supplier and Candidate Service Network CAI has developed a nationwide network of over 2,400 Suppliers through its term of service as an MSP. Each specific MSP program has its own Supplier pool made up of existing suppliers who bring the right capabilities and credentials to support the client. Suppliers can be in multiple networks, creating growth and revenue opportunities for themselves. We particularly encourage small and disadvantaged businesses to take advantage of these opportunities. CAI has an established Supplier pool under the current Sourcewell program but will continually add to it through its open enrollment process. Under our MSP Programs, CAI has processed more than 18,500 engagements across 528 state and local agencies. This provides an indication of how successful we are in managing such a large supplier base.</p> <p>CAI engages Supplier partners via an SA that defines the relationship between CAI and how the Supplier is to support our customers. The SA includes specific service level agreements (SLAs) and performance metrics that will be tied to the specific Member agreement so that the Supplier understands what their expectations are in terms of performance, delivery, payment, and other contractual obligations.</p> <p>Our Supplier partners participate in the program by submitting candidates through</p>

the competitive placement process. Suppliers can join at any time, and it enables the client access to a variety of candidates at consistent rates. Since Suppliers can join the network at any time, it also eliminates the need for layers of subcontractors. If necessary, we will define a tier structure during implementation with input from the Members. For example, the first tier may include Suppliers who are qualified small or disadvantaged businesses that have an economic impact on the Member. While the first tier may be the first group of Suppliers to receive notice of a requisition, all firms within each tier are competing fairly for the work.

CWS: Leadership and Account Management

CAI's CWS practice has dedicated leadership responsible for the delivery and growth of these programs. Linda Leiby, Director, MSP, has supported Sourcewell since our partnership inception and understands our partnership goals and commitments. Cynthia Sullivan, Executive Director, Public Sector, is dedicated to customer success and growth of our CWS Offerings and Programs. Both leaders will be specifically driving the education and adoption of Sourcewell benefits both internally across the CAI organization and externally to existing and new clients.

The success of an MSP program starts with the Account Management team. The ability of the CAI Account Management team is to work alongside the Member, develop a trusted partnership, and be proactive in the management of the service. As full-time employees, our Account Managers are dedicated to this service for Sourcewell and its Member community. The initial Account Management team – which will manage and maintain each Member – is a highly experienced group of staffing professionals. Our core team will be led by Linda Leiby, Director, MSP. In support of Ms. Leiby will be Account Managers, Scott Edwards and Amy MacDonald. CAI has a large account management team and operations support team tied to our CWS practice. This provides the flexibility needed to support growth of the Sourcewell account. As more Members onboard under the program, CAI will assign either Mr. Edwards or Ms. MacDonald, or if needed, an Account Manager from our larger team. With the success of Long Beach and other Members in the program, CAI has a model to follow. Our Account Managers have helped Sourcewell realize over \$16.3M in overall spend, and when adding the State of Iowa program, an additional \$79.1M; it is clear the model of strong account management at CAI works.

We will also utilize CAI support personnel, whose ability and experience will be to ensure the successful implementation of the project, the correct configuration of the VectorVMS system itself, pre-established contractual relationships with Contractors, marketing, and communications for the program, and Billing and Payment activities.

In support of Members, CAI may propose establishing local Account Management Teams in those areas based on client business needs. Experience is the most critical element to ensure a team's success in managing a staffing MSP program. Having Account Management teams that possess staffing experience based on industry best practices adds value at all phases of the process, from requirement qualification, candidate screening, and through on-boarding. CAI can also leverage a team of seasoned Account Managers in Harrisburg, PA, as well as team Members in other states. With this approach, we can manage and support Members' day-to-day business locally, having access to additional resources during peak periods of activity.

CAI's Account Management team is comprised of experienced staffing professionals who possess excellent communication skills, an understanding of the broad range of staffing roles and their requirements gained through in-field experience, and who are dedicated to alleviating the time-consuming task of hiring contingent staffing resources.

They are involved in every part of our solution including:

- Meeting with Member Program Managers to consult regarding needs and to assist with requirement preparation
- Screening resources and performing interviews
- Working with Suppliers to improve their ability to respond to requests
- On-boarding resources (resource support)
- Closing out engagements
- Resolving performance and supplier issues for the Member
- Conducting review meetings for state purchasers
- Holding Supplier meetings and calls to provide program information and review dashboards and metrics
- Providing feedback and customer satisfaction

17	<p>If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.</p>	<p>CAI is currently licensed to conduct business in 47 states within the U.S., and we are corporate members of Staffing Industry Analysts (SIA). Our individual employees hold countless certifications, depending upon their position and sector, such as ServiceNow System Administration, Platform as a Service (PaaS) environment, Project Management Professional (PMP) certification, Certified Information Systems Security Professional (CISSP), Certified Information Systems Auditor (CISA), Certified Information Privacy Technologist (CIPT), Payment Card Industry Professional (PCIP), members of (ISC)², Inc., Information Systems Audit and Control Association (ISACA), International Association of Privacy Professionals, and Project Management Institute, Inc., and certifications, which include Lean, Six Sigma, Information Technology Infrastructure Library (ITIL), and International Institute of Business Analysis (IIBA), and Certified Contingent Workforce Professional (CCWP).</p> <p>VectorVMS is an industry leader in the Vendor Management Application sector, and they hold several certifications, including but not limited to:</p> <ul style="list-style-type: none"> • ISO 27001 • ISO 27701 • SOC 2 Type 2 • PeopleFluent's Privacy Shield
18	<p>Provide all "Suspension or Debarment" information that has applied to your organization during the past ten years.</p>	<p>CAI has not been suspended or disbarred during the last 10 years.</p>

Table 3: Industry Recognition & Marketplace Success

Line Item	Question	Response *
19	Describe any relevant industry awards or recognition that your company has received in the past five years	CAI has been fortunate enough to receive the following awards, recognition, and commendations over the last five years: 2024 • "America's Greatest Workplaces for Diversity," Newsweek 2023 • "Gold winner in DEI," 8th Annual 2023 GLOBEE Business Awards • "Top Workplace in the Lehigh Valley," The Morning Call (10th year in a row) • "Top Workplace," Chicago Tribune • "America's Greatest Workplaces for Diversity," Newsweek • Corporate Sponsor of the National Association of Counties (NACo) 2022 • "Place to Work for Disability Inclusion," Disability:IN • "Top Workplace in the Lehigh Valley," The Morning Call • "Best Employers for Diversity," Forbes • "Top Workplace," Chicago Tribune 2021 • "Top Workplace in the Lehigh Valley," The Morning Call • "Top Workplace," Chicago Tribune • "Best Place to Work for Disability Inclusion," Disability:IN 2020 • "Top Workplace in the Lehigh Valley," The Morning Call • Lutron – Help Desk Delivers During Pandemic • Bristol Myers Squibb - Autism2Work (A2W) Team Exceeds Expectations Commendation
20	What percentage of your sales are to the governmental sector in the past three years	In the past three years, 89% of CAI's business has been in the governmental sector. *
21	What percentage of your sales are to the education sector in the past three years	In the past three years, 1% of CAI's business has been in the education sector, with 581 placements totaling \$32.3M. CAI's commitment to the education sector goes beyond sales. CAI founded and funded the CAI Learning Academy based in Allentown, Pennsylvania. At the CAI Learning Academy, we provide inner city children with a learning environment that nurtures, educates, and inspires our students to become self-motivated, life-long learners who are equipped to make a difference. Of note, CAI has invested 49.2M in education initiatives since 2011 via our CAI Cares program.
22	List any state, provincial, or cooperative purchasing contracts that you hold. What is the annual sales volume for each of these contracts over the past three years?	CAI has many state and cooperative contracts; we have provided three years of sales as requested for some of CAI's top grossing revenue clients. • Sourcewell – US: \$10,513,683 (2021), \$11,717,402 (2022), \$12,500,000 (2023) • Sourcewell - State of Iowa: \$33,030,639 (2021), \$39,358,362 (2022), \$40,000,000 (2023) • District of Columbia: \$71,503,338 (2021), \$76,647,909 (2022), \$88,000,000 (2023) • State of Arkansas: \$7,969,797.04 (2020), \$8,266,675 (2021), \$7,215,165 (2022), \$8,000,000 (2023) • State of Delaware: \$14,303,837.49 (2020), \$13,415,074 (2021), \$7,829,667 (2022), \$18,624,500 (2023) • State of Georgia: \$91,016,399.00 (2020), \$124,827,090 (2021), \$149,057,888 (2022), \$171,000,000 (2023) • State of New Jersey: \$81,561,259.98 (2020), \$98,807,017 (2021), \$126,830,868 (2022), \$145,000,000 (2023) • State of North Carolina: \$102,693,683.63 (2020), \$122,328,579 (2021), \$139,508,733 (2022), \$159,000,000 (2023) • Virginia Information Technology Agency: \$120,599,829.85 (2020), \$162,375,431 (2021), \$177,771,971 (2022), \$225,000,000 (2023)
23	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	CAI does not hold a General Services Administration (GSA) contract or Standing Offers and Supply Arrangements (SOSA) contract. *

Table 4: References/Testimonials

Line Item 24. Supply reference information from three customers who are eligible to be Sourcewell participating entities.

Entity Name *	Contact Name *	Phone Number *	
State of Iowa Executive Branch	Michelle O'Hollearn, Deputy CIO	(515) 829-1810	*
San Diego County Regional Airport Authority	David Ellis, Manager, Information and Technology Services	(619) 400-2491	*
New Hampshire Department of Information Technology	Steven J. Kelleher, Director of Governance and Strategic Planning	(603) 223-5708	*

Table 5: Top Five Government or Education Customers

Line Item 25. Provide a list of your top five government, education, or non-profit customers (entity name is optional), including entity type, the state or province the entity is located in, scope of the project(s), size of transaction(s), and dollar volumes from the past three years.

Entity Name	Entity Type *	State / Province *	Scope of Work *	Size of Transactions *	Dollar Volume Past Three Years *	
Sourcewell - State of Iowa	Government	Iowa - IA	Under the Sourcewell MSP for IT and IT Staff Augmentation program, CAI provides the MSP solution and contractor management services to provide contingent labor to the State of Iowa. We manage Contractors, provide reporting, account management, manage and maintain the VectorVMS application, provide support and escalation, screen, and interview, and ensure contractual compliance, SLAs, and key performance indicators (KPIs) are met.	1,059 Engagements	\$112,389,001	*
Virginia Information Technology Agency (VITA)	Government	Virginia - VA	CAI provides the MSP solution and contractor management services to provide contingent labor to VITA. CAI has supported the VITA contract for 15 years and through successful recompetes of the contract. We provide T&M staff augmentation services as well as SOW services via a network of 549 Contractors. We currently work with 57 agencies across the Commonwealth, supporting those agencies with 50 discrete labor categories that are further broken into four skill levels. The rate card is also divided into two regions: Northern Virginia, which takes into consideration the market effects of the Capital area; and the remainder of the Commonwealth. The rates are 'not to exceed' rates.	7,272 Engagements	\$565,147,402	*

State of North Carolina	Government	North Carolina - NC	CAI holds the contract to provide all temporary staff augmentation Resources to the State of North Carolina via an MSP solution, which meets contractual SLAs, KPIs, and reporting targets, and provides continuous improvement and quality management at the core of its service. We work with a contractor network, established rates, and we supply qualified candidates to hiring managers on a timely basis. CAI supports 43 agencies across the state currently and has 790 Resources engaged. The network of Contractors is sizable, with 546 currently enrolled. Our performance is measured through a series of SLAs that target items such as approval time, resume submission to agency time, invoicing accuracy, payment accuracy, and VMS availability. With CAI's program, the time it takes to fill each role has been reduced from two to three months to about six weeks (including purchase order [PO] creation and candidate notice to current employer), and the reporting capabilities have improved.	4,529 Engagements	\$420,837,312	*
State of New Jersey	Government	New Jersey - NJ	CAI provides the MSP solution and contractor management services to provide contingent labor to the State of New Jersey. We have provided services to the State of New Jersey through various cooperative contracts since 2008, utilizing a network of 242 Contractors. We manage Contractors; provide reporting and account management; manage and maintain the e-procurement application; provide support and escalation; screen and interview; and ensure that contractual compliance, SLAs, and KPIs are met.	4,532 Engagements	\$370,637,885	*
District of Columbia	Government	District of Columbia - DC	CAI provides the MSP solution and contractor management services to provide contingent labor to the District of Columbia. We manage Contractors; provide reporting and account management, provide support and escalation; screen and interview; and ensure contractual compliance, SLAs, and KPIs are met.	2,939 Engagements	\$236,151,247	*

Table 6: Ability to Sell and Deliver Service

Describe your company's capability to meet the needs of Sourcwell participating entities across the US and Canada, as applicable. Your response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *
26	Sales force.	<p>CAI is a leading provider of CWS services and staffing, as well as project-based services to nationwide public sector clients. Our breadth of experience and locality reach places us in an extremely able position to support Members with a broader range of capability than a staffing or recruitment firm might be able to offer. CAI will be selling the Sourcwell contracts through our nationwide network of over 200 sales staff and advocates nationwide, all of whom are full-time employees. CAI has offices in eight cities and is registered to do business in 47 states. CAI's structure is such that all leaders, sales staff, and client-facing delivery staff are considered 'sales' staff, guaranteeing not only growth and successful delivery but also ensuring the utmost customer satisfaction. To this point, CAI's Delivery Team - non-sales - supporting the Pennsylvania Turnpike Commission (PTC) has, in fact, made sales through the Sourcwell program, having used the contract as a tool for PTC to procure staff that it would otherwise have not been able to access. Additionally, CAI has leveraged the Sourcwell Supplier Portal to help inform and educate clients on the benefits that Sourcwell has to offer.</p> <p>A distinctly unique approach, CAI is also working with our Suppliers to 'sell' the program to their existing clients. CAI is developing an approach to assist our contractor network in targeting their customers, explaining the speed and benefits of the Sourcwell program to the entity, and then helping them become a Sourcwell Member to procure professional services.</p> <p>We have international offices in India and the Philippines. Our company is headquartered in Allentown, PA; we also have offices in Newark, DE; Richmond, VA; Tallahassee and Coconut Creek, FL; Chicago, IL; Des Moines, IA; and Irvine, CA.</p>
27	Dealer network or other distribution methods.	<p>Team CAI's delivery model is simple and poses minimal risk to the Member but is expansive in nature, offering a nationwide reach. With a consultative approach, the CAI Team leads the engagement, with the right blend of skilled staff performing the assessment. We do not rely on a dealer network or other distribution methods to engage with the Member. Consultation is primarily delivered in a remote setting so that we can quickly engage with Members as they reach out to us, or we target potential Members through our marketing activities.</p>
28	Service force.	<p>CAI's CWS practice is a mature organization with well-established, proven processes and practices for managing staffing contingent labor. Our large, dedicated team of 34 staff is comprised of seasoned professionals with substantial expertise in program management, IT staffing, and MSP operations. Our leadership team has significant experience delivering CAI's MSP programs, with an average CAI tenure of more than eight years.</p> <p>The CAI Contract Management team will provide service and alignment with agencies to provide transparent service across the contract transitions and beyond. We provide an experienced back-office team, which manages administrative functions, such as subcontractor enrollment and compliance, timesheets and invoicing, and analytical support services.</p> <p>The contract management team will provide analytics for process improvement and SLA metrics: a known process, with proven performance. Our VMS provides the functionality and ability to provide detailed reporting across thousands of individual data points to ensure the program operates productively and efficiently for Sourcwell and its Members.</p> <p>Part of our team includes a Vendor Management Team for enrolling new contractors, responding to contractor's questions and requests, and for audit and maintenance of contractors' compliance items. Auditing of all contractor's documentation is performed automatically through our Supplier Portal, managed by the Vendor Management Team, with email alerts sent to Contractors as documents near their expiration dates, requesting that they submit updated documentation. This ensures our contractor network is always current and compliant to support Members.</p>
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>The MSP program deploys an integrated ecommerce model that provides easy access to contingent labor. A full diagram of the entire process appears at Attachment B – Graphics Book; Figure 2 Staff Augmentation Workflow Process. This narrative describes the ordering step of the process. We can provide a demonstration of the ordering process, which will allow Sourcwell to understand the ease of the process when used by the Participating Entity.</p> <p>CAI is responsible for the full cycle of obtaining staff, confirming their competencies, completing screen activity, and preparing them for their assignment. We work with Contractors to make sure all requirements to the order have been met and the start of the engagement is on time.</p> <p>1. Initiate Contact & Consult The Member contacts CAI to confirm job classification and discuss requirements.</p>

When planning for a new requisition, Members can engage with CAI proactively to discuss their needs before the official submission. In some cases, this step involves interactive discussion on the most appropriate job classification, especially when multiple classifications may be suitable for the work at hand. Given that certain projects may fall under multiple categories or require a blend of skills, our interactive dialogue helps Members navigate these complexities.

During these discussions, we offer our expertise to assist Members in crafting a clear and comprehensive job description. Our role is to ensure the ordering process has enough information to support the Contractors search for candidates as well as expedite the process.

If needed, we provide access to standardized job description templates available within the MSP management system, which serve as a helpful starting point and ensure consistency across different requisitions.

Our primary goal is to equip the Member in the ordering process with thorough and precise information, which is instrumental for Contractors in their search for the ideal candidates. Through this proactive approach, we significantly increase the chances of identifying an ideal candidate fit, while concurrently optimizing the hiring timeline for greater efficiency and speed. By proactively addressing potential queries and uncertainties at the initial stage, we preempt delays, paving the way for a recruitment process that is both more streamlined and outcome- focused.

In essence, our involvement at the early stages of the requisition process exemplifies our dedication to service excellence. We aim to deliver a seamless experience for Members by providing proactive support and leveraging our resources and expertise to expedite and refine the recruitment cycle.

2. Create Requisition

The Member creates requirement in VectorVMS and blocks off time for interviewing.

The Member plays a key role in initiating the staffing process by creating the requisition, and the VectorVMS system is designed to support them every step of the way. Utilizing a guided approach, the VMS provides a series of sequential screens that lead the Member through the requisition creation process. The image at Attachment B – Graphics Book; Figure 3 Create Requisition Workflow as Viewed in VectorVMS appears across these screens so the user can easily see their progress in completing all required components of the requisition. This visual aid ensures that Members can easily track their completion of each necessary component within the requisition.

During the transition phase to this VMS system, our team will configure the platform to include all work products, templates, and workflow items that are pertinent to the Member's operations. The configuration will be done with attention to incorporating approved job titles, job descriptions, skillsets, and templates, as well as employing other structured means of information organization. Our goal is to simplify and expedite the requisition process for the Member, providing a seamless experience.

When we tailor the VMS to the specific needs of the Member, we aim to achieve a uniform presentation of information, which is instrumental for the Member's review of candidates. This consistency not only facilitates the Member's decision-making but also ensures that candidates are evaluated and compared on an equitable basis. The result is a more efficient requisition process that enables the Member to move swiftly and confidently through the stages of securing the right talent.

3. Obtain Approval & Release

An additional Member approver logs into VectorVMS and approves the requisition, if required.

Some Members may operate under protocols that necessitate additional layers of approval for staffing requisitions. In recognizing the diversity of our Members' needs, we will tailor the VMS configuration to accommodate these specific approval workflows. This means the approval process within the VMS may vary from one Member organization to another, ensuring that it aligns with the distinct procedural requirements of each entity or geographical location.

Moreover, it is essential for Members to secure PO approval as part of the staffing requisition process. To avoid any potential setbacks, we advise Members to proactively obtain an approved PO before finalizing their requisition. Our experience has shown that this preemptive step is crucial; Members who have completed interviews and then encountered delays in PO approval have occasionally faced the disappointment of their chosen candidate accepting an alternative offer in the interim.

Once the requisite approvals are in place and the requisition is complete, we then proceed to release the requirement to our extensive Supplier network. The suppliers are then tasked with presenting suitable candidates within the stipulated timeframe,

		thus initiating the recruitment cycle and moving the process forward toward securing the needed talent. This structured approach ensures a streamlined and efficient ordering process that minimizes delays and maximizes the chances of successfully filling the position with a qualified candidate.	
30	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	<p>CAI identifies three key components that enable the Sourcewell Participating Entity to fully utilize the contract to its utmost capability with satisfying results. The key components are Account Management, Operations Support, and established Service Levels. These components form the basis of our customer service and support program. CAI's experience across a multitude of services contracts and clients, our proven record of implementing and delivering successful programs, our ability to adapt our programs to changes in the industry, and our commitment to industry best practices is unparalleled by other Contractors.</p> <p>Account Management We have Account Management teams at regional, state, and local Sourcewell Member levels who provide the advice and guidance in using the service and are also the first POC for the Sourcewell Member. Each Account Manager will ensure that any contractual service levels and metrics are being met and identify resolutions if those service levels are falling short. The team will work alongside the client, develop a trusted partnership, and be proactive in the management of the service. The Account Manager is dedicated to offering extensive assistance within the VMS portal, including Help Desk training and relaying client feedback to Vector, ensuring that the system is finely tuned to meet the unique requirements and enhance the experience of each client. With this approach, we can manage and support the day-to-day business, while having access to additional Resources during peak periods of activity to ensure customer satisfaction.</p> <p>Operations Support From an operational standpoint, the support structure for our services will be tailored to the scope, complexity, and level of need each Member requires. The initial information is gathered after the Member initiates contact. The team leverages a shared pool of expert support resources to provide full shift coverage, as well as on-demand consultants that are scheduled as required to complete cyclical tasks and ad hoc security engagements. The model would also include regular access to security and asset management experts that help our clients stay abreast of market changes and new threats, periodically evaluate, and optimize service delivery and costs, and provide leadership in architecting and deploying additional solutions. Furthermore, we provide comprehensive support to our clients in managing invoices and facilitating payments. Our team is continuously on the lookout for innovative technologies that can deliver tangible benefits and enhance the overall client experience.</p> <p>Service Levels Each Sourcewell Participating Entity, through its Participating Addendum of the Sourcewell cooperative contract, can work with CAI to create SLAs based upon their unique business needs. The reason we work with the Participating Entity is to ensure that the service level reflects the size and scope of each Sourcewell Participating Entity, and their anticipated usage. The SLAs are reviewed quarterly, and changes can be made to type, scope, and frequency if the SLA or metric does not measure the most valuable information that the Sourcewell Participating Entity needs.</p> <p>CAI has significant experience creating and delivering against SLAs and will provide input and feedback during the kickoff meeting so that the Sourcewell member can construct SLAs for the most benefit.</p> <p>Response Time Capabilities and Commitments CAI is committed to responding to all inquiries from members within two business days.</p>	*
31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in the United States.	CAI will fully support all geographic areas of the U.S., including Hawaii and Alaska. We have a nationwide presence as a company, and we are fully confident and committed to exceed requirements for Participating Entities across the U.S.	*
32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	CAI is willing to provide services to Canadian Sourcewell participating entities in partnership with our Canadian business partner.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed contract.	CAI will support all geographic areas of Sourcewell Participating Entities in the U.S. and Canada.	*

34	Identify any Sourcewell participating entity sectors (i.e., government, education, not-for-profit) that you will NOT be fully serving through the proposed contract. Explain in detail. For example, does your company have only a regional presence, or do other cooperative purchasing contracts limit your ability to promote another contract?	CAI will fully support all Sourcewell Participating Entity sectors including government, education, and not-for-profit. We have a nationwide presence, and we are fully confident in our ability and commitment to exceed requirements across all Participating Entity sectors and locations.	*
35	Define any specific contract requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Should we be awarded a contract, we do not have any current competing cooperative contracts that restrict CAI in promoting the Sourcewell Contract.	*

Table 7: Marketing Plan

Line Item	Question	Response *	
36	Describe your marketing strategy for promoting this contract opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>CAI has experience developing and executing successful marketing plans across all programs. We understand how to drive business to the contract because we offer the features, benefits, and value of a program in a way that resonates with the Sourcewell Member.</p> <p>CAI understands that Sourcewell works closely with its vendors to promote and educate both the vendor and the Sourcewell Member on the benefits and use of the contract. We understand that Sourcewell advertises awarded contracts in select specific publications, such as including the award in the Contract Directory, so Sourcewell Members know who we are and how to contact us. These publications also state that we attend exhibitions, maintain a web presence, and conduct other strategic activities.</p> <p>CAI's marketing strategy will be to continue to collaborate with specific activities and execute further complementary tasks that reach the Sourcewell Member verticals with a tailored approach that gains interest for members with the need of a managed detection and response (MDR) or an Asset Management solution. This approach has contributed to our successes to date. Such verticals will include state and local government, education, and non-profit entities, among others. As new verticals arise during the contract, CAI will develop new strategies to reach those markets. Our discovery process will identify marketing tactics, in addition to those discussed below, as well as identify ways to improve and quantify the success of the marketing strategy.</p> <p>To ensure success, CAI will continue to educate our sales representatives so that they fully understand and promote the cooperative way of selling, and the value that brings to the Member and procurement process. A cooperative approach benefits each Member through increased purchasing power; CAI's goal will be to increase the number of Members participating in the Sourcewell Technology Products and Services with Related Solutions contract. This approach will be measured and reported during the lifecycle of the contract so that Sourcewell can see an upward growth curve.</p> <p>We will continue to work with Sourcewell Members to provide pricing that is within their reach, adjusting accordingly to the environment. Our service and pricing model is modular in nature, allowing the member to only purchase based on their needs. This approach offers a broad solution to onboarding new Members and getting them active. We can further tailor pricing with additional discounts at the individual member level when needed.</p> <p>In conjunction with this flexibility, CAI is also able to tailor terms and conditions per the individual Member via a specific Participating Addendum. This allows us to work with specific service levels or performance metrics, local or state law, or national laws that benefit the Member and the way they are governed.</p> <p>A strong marketing approach will promote the benefits and advantages to cooperative purchasing so that the rewards are clear to Sourcewell. We will target existing Sourcewell Members and prospective entities that are not current Sourcewell Members. Our marketing team will present the benefits of Sourcewell Membership. CAI and its partners have established clients and potential clients that would be part of our initial market targeting. This will also include targeting new verticals to expand the collective reach of the contract as much as possible.</p> <p>CAI has a distinct advantage as a current Sourcewell provider. We continually develop, learn, and understand new market and technology trends through our existing clients and marketing efforts. This advantage allows CAI to recognize a trend or change in the IT industry that will impact existing or future clients and gives us the ability to prepare for future needs prior to the customer addressing their own requirements and processes. These traits make CAI an invaluable partner – by using our experience and capability to guide a customer's navigation of the staffing industry as a time and cost saving exercise.</p>	*

<p>37</p>	<p>Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.</p>	<p>CAI targets several social media platforms when developing its digital marketing strategy. We have an established presence on those most popularly used by public sector, including LinkedIn, where we have over 72,000 followers as of April 2024.</p> <p>LinkedIn is one of the most professional social media marketing platforms. LinkedIn Groups is a great venue for entering into a professional dialogue with people in similar industries; it provides a place to share content with like-minded individuals. We will encourage customers to recommend our Sourcewell offerings. Recommendations make the offerings appear more credible and reliable for new Members. CAI continues to engage with our client audience by sharing thought leadership articles, webinar replays, trending news affecting our clients, and LinkedIn Live Events where we interact live with our viewers. https://www.linkedin.com/company/cai-insights</p> <p>Facebook provides a casual but broad-reaching environment. Our Facebook business page concentrates on the visual aspect, inviting viewers to interact and 'follow' the page. It includes industry-related articles, thought leadership content, images, videos, and other items. The tone is light with Facebook, encouraging feedback and conversation, so that we can understand the audience better. https://www.facebook.com/CAIInsights/</p> <p>X (formerly known as Twitter) is the social media marketing tool that allows CAI to broadcast updates. We will follow tweeters within the Sourcewell community, industry, or related fields, to help gain new followers. We will offer a mix of official tweets about news updates with some compelling tweets, facts, and other items to appeal to the Sourcewell community. An effective way to gain a good following is to re-tweet a positive customer testimonial or quote, which builds confidence in the user community. Dialogue and communication are central to using X as a social media marketing tool. https://twitter.com/CAI_Insights</p> <p>CAI harnesses metadata to refine and enhance its marketing strategies, leading to more effective campaigns and improved customer engagement. From email campaigns to search engine optimizations (SEOs), CAI uses metadata to personalize marketing content for different audience segments and target users who have shown interest in specific services or topics. Additionally, this tactic provides valuable insights, such as tracking user engagement and interaction, open rates, click-through rates, and conversion rates to analyze the effectiveness of various marketing initiatives, allowing CAI to optimize future campaigns. This allows us to segment audiences based on demographics, behaviors, preferences, and historical interactions. By understanding these segments, CAI can tailor marketing messages to resonate with specific groups, improving the relevance and impact of campaigns.</p> <p>Internally, CAI conducts bi-monthly meetings between the growth leadership team and the marketing department to guarantee cohesive alignment and clear messaging in its marketing materials, specifically tailored to its CWS and Sourcewell offerings, leading to significant growth with the programs.</p> <p>CAI leadership and subject matter experts (SMEs) often create blog posts and thought leadership content that include topics, such as cooperative contracts. These posts are designed to share insights, best practices, and the benefits of cooperative purchasing. They can also provide updates on new cooperative contracts, discuss how these contracts can streamline procurement processes, and explore the advantages they offer to public sector organizations. For example, CAI's resources on their website feature articles that delve into government cooperative purchasing contracts and how entities can leverage these agreements for cost savings and efficiency. Through these blog posts and articles, CAI demonstrates its expertise and experience in the field, providing valuable information for organizations considering or currently using cooperative contracts.</p> <p>We consistently roll out extensive marketing campaigns that include precision-targeted emails, expertly designed landing pages showcasing our offerings, and timely updates to our array of services, all strategically crafted to streamline and enhance interaction with CAI. In our email correspondences, we prominently feature the Sourcewell logo within our signature blocks, reinforcing the strength and significance of our alliance with Sourcewell.</p> <p>More information can be found in Attachment A – Marketing Plan.</p>
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<p>38</p>	<p>In your view, what is Sourcwell's role in promoting contracts arising out of this RFP? How will you integrate a Sourcwell-awarded contract into your sales process?</p>	<p>Sourcwell and CAI will act in partnership to promote the Staffing and Services contract to the Participating Entities. With access to more than 80,000 prospective entities and doing business with 50,000 registered entities, Sourcwell can help CAI get in front of its member base to promote these services as the right choice for candidates.</p> <p>We would look for Sourcwell through its typical communications, such as social media, exhibitions, and other outreach activities, to promote the benefits of the Service and socialize the CAI name as the prime vendor and POC. As a partnership, promotional activity must go both ways to be successful; Sourcwell can provide contact opportunities and CAI can drive revenue where Sourcwell will gain revenue in return.</p> <p>CAI will work with Sourcwell to develop new marketing collateral and presentations so that Sourcwell has the right material to present the features and benefits to the staffing organization or individual when an opportunity arises. CAI is committed to aligning with and fully complementing the platform. Our intention is to integrate Sourcwell's portal functionalities into our processes, ensuring a harmonious and efficient partnership. Additionally, CAI plans to adopt Sourcwell's branding aesthetics, utilizing their imagery and incorporating their design language into our marketing materials to create a cohesive and unified visual presentation that resonates with the values and identity of both Sourcwell and CAI. CAI will use the existing Sourcwell Member base to reaffirm its contact list to create the opportunity to grow these services. As part of our efforts to socialize our services, on award, CAI will provide training and education for our personnel, reaching all our Sales and Marketing and account teams nationwide. This will maximize the opportunity for CAI personnel to promote the new services to our clients and potential new clients.</p> <p>Our marketing team follows a standard process for campaign workflow to execute Sourcwell-related campaigns. Our campaign workflow is further highlighted in Attachment A – Marketing Plan.</p>
<p>39</p>	<p>Are your products or services available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.</p>	<p>Yes. CAI proposes the continued use of the VectorVMS® e-procurement application, a tried and understood technology that is familiar to both Sourcwell and its Members. It has been utilized in 19 separate MSP solutions and is the platform used by 528 discrete agencies and entities nationwide. This includes state and local government as well as education and higher learning entities, and non-profits. It is a verified ecommerce system that facilitates instant communication between stakeholders and serves as a common repository for information related to engagements created through the MSP program. Unlike competitors in this space, the VectorVMS application is Section 508 compliant to WCAG 2.0 AA standards.</p> <p>Sourcwell and its Member will have access to multiple dashboards, allowing managers to easily see performance metrics, the status of specific requisitions, and timesheet information for assigned temporary staff. Workflow is provided to allow the Member to approve resource hours, reimbursable expenses, and deliverables (if applicable) prior to invoice submission. The VMS is a robust system that automates the resource and project engagement process for each Member. A full list of features is illustrated in the diagram Attachment B – Graphics Book; Figure 4 – VectorVMS, a Powerful e-Procurement Tool.</p> <p>Online Processes The core VMS component triggers electronic notifications to impacted stakeholders based on business rules. For example, when a Member releases a staffing request through our electronic requisition process, the VMS notifies multiple CAI representatives, and can be configured to also alert other Member, stakeholder, or entity staff. CAI will review/confirm the request and release it to the pool(s) of providers based on the job position and location. This instantly notifies registered providers of the opportunity.</p> <p>Resume Review As providers respond with resumes and professional/biographic data on their available staff, the VMS notifies the CAI managers. Notifications occur in the form of email, which stakeholders can view from their PC or mobile device via a specific mobile application available for iOS and Android. Members can also log directly into the VMS at any time to see the status of staffing requests, availability of candidates, interviews scheduled, and performance reports, etc. The VMS provides transparency into the entire procurement process.</p> <p>Statement of Work Proposal Review and Ranking Our VMS system can provide Members with ranking abilities when Suppliers submit proposals for project work. The Member manager may review and score each proposal within the system as defined during initial configuration of the VMS application.</p> <p>Invoice Submission and Tracking Time is recorded in the VMS and approved by the Member Hiring Manager. If additional oversight is required on time approval, the VMS can accommodate the task and route as appropriate, capturing the additional approval. Invoicing is generated from completion of time approval steps, and we use the VMS and approval tasks as the baseline for any discrepancies or issues.</p>

		<p>Reporting We can provide summary reporting on an agreed upon basis. An example of report content may include summary of sales for the last period, subtotaled by agency with current hours and bill rates; a utilization report; and an SLA achievement report.</p> <p>These reports, based on existing client data, clearly show the reporting capabilities CAI and the VectorVMS® can offer. We will produce accurate and substantive information that describes the value of the Sourcewell program and includes active network Contractors, pending network Contractors, inactive network Contractors, business trends, MWBE, participation rates, contract utilization by Member and job category, and market rates and contract hourly reviews. We can also review SLA performance, where we have exceeded expectations, and how we might improve indicators should trends be identified. Reporting may be specific to the Member requirements and delivered as and when needed according to the participating addendum.</p> <p>Purchase Order/Resource/Project Tracking CAI measures Supplier performance on a T&M SOW through a series of reports via the VMS Business Intelligence Platform. The specific reporting will depend on how the Member defines business rules for using SOWs. If milestones or deliverables need to be formally tracked, CAI would use our existing milestone tracking report; this report indicates whether milestones are being delivered and approved per the contractual schedule defined in the SOW. We can also develop reports to track T&M hours against specific milestones or not-to-exceed hours as defined in the SOW. Should a SOW include a cap on T&M hours, we track hours against this cap just as we would with a staff augmentation engagement, where we monitor hours against a not-to-exceed price in a PO.</p> <p>Customer Satisfaction Surveys We conduct both internal and external quality reviews of our business processes, which will be evident in Customer Satisfaction surveys and quarterly business review.</p> <p>Single Sign On The solution supports SAML 2.0 token authentication for SSO. If clients are not using Single Sign On, they will be authenticated into the platform with a username/password/org key.</p> <p>Backoffice Integration The VectorVMS® has interfaced with all major enterprise resource planning (ERP) systems, as well as accounting systems and various project management tools. Some of the more common include SAP, PeopleSoft, Clarity, Ariba, Oracle, Kronos, and Lawson. The VMS has a built-in integration engine which supports XML, HRXML, flat files, FTP, and https for seamless data exchange with other enterprise applications.</p> <p>Technical and Functional Assistance The Member will be provided with a team who will administer and configure the VMS. This team will manage access to the VMS instance through user profile creation and maintenance. Each user has his/her own user profile within the VMS. The user profile is the basis for the VMS authorities granted to each individual user. An unlimited number of user roles can be created within the VMS, which are then used for approval workflows, data access, and reporting capabilities. Demographic information such as email address, role description, and phone numbers are also stored in the user profile.</p> <p>During implementation, CAI will gather the details for each Member and configure that within VectorVMS® to provide each user the appropriate access. After implementation, user access will be maintained through a request and approval process so that only those users who are authorized to access the VMS are given a user profile. The Member has access to multiple administrative settings that allow them to customize interaction across the program. This includes management of workflow settings, user profiles, and other custom settings that will be particular to general requirements and Member-specific requirements.</p> <p>We will discuss implementation of our e-procurement tool with Sourcewell and its Members as part of contract negotiation and continuation of service.</p>
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Table 8: Value-Added Attributes

Line Item	Question	Response *
40	Describe the types of tools and technologies your company uses for staffing management.	<p>VectorVMS</p> <p>The tool we use for staffing management and fulfillment in our CWS practice is VectorVMS. Recognized as an industry leader, particularly in the Public Sector, we have extensive qualifications in managing state-wide MSPs using Vector. Our MSPs offer comprehensive labor services, catering to a broad spectrum of staffing. Our programs are designed to facilitate both T&M and Project-based engagements, encompassing staff augmentation,</p>

SOW, Direct Placement, and Operations & Maintenance. In many programs, CAI is both the MSP and an approved vendor within the program, allowing CAI to assist in filling staff augmentation & SOW roles.

ServiceNow

CAI's Supplier Management Portal is built on the ServiceNow platform. CAI maintains this platform to support Supplier Enrollment, Documentation Accuracy & Expiration, & Help Desk support functionality. CAI's ServiceNow Practice was formally established in 2012 in response to customer demand for high quality ServiceNow consulting and implementation services. Since that time, CAI has engaged in more than 25 implementations, as well as numerous support engagements, platform development projects, consulting engagements, and client training initiatives. CAI is an Elite ServiceNow partner with Program Module specialty in Sales, Services, Technology, and Service Provider. CAI has ServiceNow experts on staff with broad expertise spanning the ServiceNow platform. We have also implemented ServiceNow internally within CAI, so we completely understand how vital it is to ensure that the platform supports the business process, and that our resources have the expertise and availability to meet our client's goals and objectives.

Background Check Tools

CAI's MSP programs include standard types of background checks, such as E-Verify, SSN Trace, National Criminal Records Search, National Sex Offender Registry Search, County Criminal Search, and Urinalysis Drug Screening.

Help Desk

CAI uses a variety of tools to build a robust Help Desk offering. Most of our service desk leaders have certification from the Help Desk Institute (HDI); all service desk leaders have completed CAI's ITIL Foundation training. The staff are trained to support commonly used technologies (e.g., Microsoft Office, multiple browsers/printers, and Apple and Android mobile devices). They are also trained to support the client's specific technologies and applications based on the contract.

CAI uses a cloud-based Mitel automatic call distributor (ACD) system to route calls and chats to agents. The ACD also allows us to call-forward service desk calls from the client's existing number into our ACD. In terms of IT Service Management (ITSM) tools, we are technology-agnostic. For managed engagements, we use our own instance of ServiceNow ITSM. Based on the contract, we also use client-supplied tools, including BMC FootPrints, BMC Remedy, Ivanti Heat, and Salesforce.com. Our service desk staff also use remote access tools such as BeyondTrust to directly access end-user devices where necessary. We make extensive use of knowledge management (KM) within the ITSM tool to ensure consistent, high-quality support.

Other tools that CAI uses include, but are not limited to:

- Workday
 - o CAI utilizes Workday, a leading provider of enterprise cloud applications for finance and human resources, to manage staffing effectively. Workday offers a suite of tools that can support various aspects of staffing management, such as recruiting, onboarding, workforce planning, time tracking, and talent management.
- Salesforce
 - o CAI utilizes the robust capabilities of Salesforce, a premier CRM platform, to streamline and enhance its staffing operations. By customizing Salesforce's comprehensive toolset, CAI seamlessly orchestrates job postings, candidate management, communication, interview scheduling, and evaluation processes within a unified ecosystem. The platform also serves as a dynamic interface for managing client relations, capturing detailed staffing requirements, and aligning talent acquisition with client objectives. Furthermore, CAI leverages Salesforce to cultivate a rich database of prospective talent, cataloging each candidate's unique skill set, work history, and professional milestones to expedite the recruitment process and ensure a perfect fit for upcoming projects.
- Phenom
 - o CAI employs the Phenom People platform, which is an AI-powered Talent Experience Management (TXM) system, to elevate its staffing management processes. Phenom's platform provides a holistic approach to attracting, engaging, converting, and retaining talent. From improving recruiter productivity to accessing more powerful analytics and insights, CAI uses Phenom to understand talent trends, measure the effectiveness of hiring strategies, and make data-driven decisions.
- Criteria Corp
 - o CAI uses Criteria Corp, a provider of pre-employment testing and assessment software, to enhance its staffing management by leveraging science-based assessments to inform hiring decisions. Criteria Corp's tools help CAI screen candidates efficiently by assessing their skills, cognitive abilities, and personality traits to ensure they are a good fit for the role and the company culture. By using standardized assessments, CAI can objectively evaluate a candidate's potential, reducing unconscious bias and making the hiring process fairer and more inclusive, while providing CAI with data analytics and reporting features that can track the effectiveness of hiring campaigns and optimize the selection. The insights gained from Criteria Corp's assessments allow CAI to make more informed decisions, increasing the likelihood of successful hires and reducing turnover.
- HireVue / CodeVue

o CAI leverages the advanced capabilities of HireVue, a leading platform for video interviewing and coding assessments, to optimize its staffing management. The platform's comprehensive coding assessments provide a deep dive into candidates' technical prowess, thinking patterns, and alignment with company culture. Harnessing the power of artificial intelligence (AI) analytics, HireVue equips CAI with nuanced insights into each candidate's technical competencies, streamlining the selection process to pinpoint the most suitable candidates with precision and speed. Additionally, HireVue's efficient scheduling and analytic tools enable CAI to expedite the hiring timeline and continuously refine interview strategies, thereby enhancing the efficacy of talent acquisition and securing top-tier talent for the organization.

- Appcast

o CAI deploys Appcast, a job advertising platform utilizing programmatic recruiting technology, which employs software and data to optimize its staffing management by reaching a wider audience and attracting the right candidates more efficiently. Appcast allows CAI to distribute job ads across a wide network of job sites and platforms, targeting candidates that fit specific job requirements and are more likely to be interested in the position. CAI can use Appcast's programmatic technology to automatically adjust where and how job ads are displayed based on performance data, ensuring that advertising budgets are used effectively to attract suitable applicants. CAI can analyze recruitment data and gain insights into which job ads perform best, where top candidates come from, and how to optimize ad spend for better returns on investment.

<p>41</p>	<p>Describe how your company complies with legal and regulatory requirements.</p>	<p>In the rapidly evolving landscape of technology services, CAI remains steadfast in its commitment to upholding the highest standards of legal and regulatory compliance. Understanding that adherence to such norms is not merely a legal obligation but also a cornerstone of trust and integrity, CAI has instituted a robust framework to ensure compliance across all facets of its operations. Our compliance plan is fundamentally rooted in adherence to local regulations, ensuring that we begin with a strong foundation that respects the specific legal frameworks of the communities we serve.</p> <p>For instance, in response to the Federal Trade Commission's announcement on April 23, 2024 of a rule Banning Noncompete Clauses, we will eliminate such provisions from our contracts and will diligently ensure that our vendors also adhere to this regulatory change, upholding fair and competitive business practices. The ruling will come into effect 120 days after publication in the Federal Register.</p> <p>Drug screening policies, particularly concerning marijuana, vary significantly from state to state, each crafting its own regulations independently of regional consensus or public sentiment. For instance, Wyoming maintains strict prohibitions against marijuana for both medical and recreational use. In stark contrast, neighboring Colorado permits the use of marijuana under both conditions. Adding to the complexity, federal agencies like the Department of Transportation enforce uniform restrictions on marijuana consumption across all states for safety-sensitive positions within the transportation sector. This includes roles such as pilots, truck drivers, and flight attendants, where safety is paramount, highlighting the intricate mosaic of drug use regulations that organizations must navigate.</p> <p>CAI is dedicated to meticulously researching and comprehending both current and emerging legislation and its implications. We collaborate closely with each entity to ensure all relevant information is captured, thereby guaranteeing that our employment offers and job performance standards are in strict alignment with the latest legal guidelines.</p> <p>Foundational Policies and Training CAI's effort begins with the creation and implementation of comprehensive policies that resonate with the legal and ethical standards expected by our clients, partners, and regulatory bodies. These policies are living documents, continuously updated to reflect changes in laws and regulations. All CAI employees undergo regular training to familiarize themselves with these policies, ensuring that everyone from the newest recruit to the highest executive is aware of their responsibilities and the importance of compliance.</p> <p>Dedicated Governance Team A dedicated Governance team, comprising legal experts and compliance officers, is at the heart of CAI's commitment. This team's primary role is to monitor the regulatory landscape, proactively identifying new laws and regulations that impact various aspects of the business. The team also conducts periodic audits and risk assessments, allowing CAI to address potential issues before they become problems.</p> <p>Data Privacy and Protection CAI takes data privacy and protection seriously, adhering strictly to data protection laws, such as the General Data Protection Regulation (GDPR) and other local regulations, providing peace of mind to users that their information is handled with the utmost care.</p> <p>Secure and Ethical Operations CAI's operational procedures are built around security and ethical considerations. From the deployment of state-of-the-art cybersecurity measures to the ethical use of AI and machine learning technologies, CAI ensures that all operational activities are conducted within the bounds of legal and regulatory frameworks.</p> <p>Stakeholder Engagement and Transparency Transparency is key to CAI's compliance strategy. By engaging with stakeholders, including clients, employees, and regulators, CAI maintains an open dialogue about its compliance initiatives. This approach fosters a culture of trust and accountability, making it clear that compliance is not just a requirement but a core value of the organization.</p> <p>Continuous Improvement CAI's approach to compliance is not static but dynamic. Continuous improvement is a part of the compliance DNA, with the organization always striving to refine its practices. Feedback mechanisms are in place to learn from experiences and evolve the compliance framework, ensuring that CAI remains at the forefront of legal and regulatory compliance in the technology services industry.</p>
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42	Describe any "green" initiatives that relate to your company or to your products or services, and include a list of the certifying agency for each.	<p>CAI is committed to demonstrating good stewardship regarding our environment. We recognize the impact our organization and our associates can have on the environment due to our diverse locations, our resource consumption, and our interactions worldwide with individuals, businesses, and other government agencies.</p> <ul style="list-style-type: none"> • As an organization, CAI is committed to: <ul style="list-style-type: none"> o Complying with all applicable local, state, national, and international polices as they relate to environmental management and our business practices. o Integrating environmental management principles into our business plans and activities o Minimizing the impacts of our activities on the environment as much as possible o Raising awareness of, and commitment to, environmental management among our associates through recycling programs, community activities, and corporate policies o Reducing paper usage • CAI's current sustainability efforts include: <ul style="list-style-type: none"> o While CAI does not currently have a Carbon Neutral Certification, we have a Corporate Social Responsibility (CSR) policy and participate in EcoVadis, the world's largest and most trusted provider of business sustainability ratings. CAI maintains this Sustainability Rating through our client AstraZeneca. o CAI has decreased its physical facility footprint by 32% since 2020. o In 2020, CAI moved to a work-from-anywhere policy for corporate associates. In addition, many of CAI's clients also moved to a remote or hybrid work environment. As a result of CAI's policy change and our clients' changes, CAI has significantly reduced employee commuting, physical facility count and usage, and disposable waste, thereby significantly reducing our carbon footprint. o During the 2010s and 2020s, CAI intentionally transitioned to cloud services. CAI has moved critical business operations functions, such as HR, Finance, Talent Acquisition, Customer Management, and Document Management, to the cloud. This transition has significantly reduced our on-premises physical asset requirements. o The partners we have selected to provide cloud services are environmentally responsible companies, with each company having science-based targets to improve their carbon footprints by the year 2030 (e.g., Workday, Pennsylvania Power & Light Electric Utilities Corporation, and Salesforce). o CAI has intentionally reduced our need for business travel by encouraging remote, video-based meetings both internally and with our clients. In addition, CAI now develops much of our marketing content to be consumed via social media channels, reducing the need for business travel or paper documents. o CAI is working towards an Environmental Sustainability program/policy during 2024.
43	Identify any third-party issued eco-labels, ratings or certifications that your company has received for the equipment or products included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	<p>CAI is not proposing any equipment or products that require eco-labels, ratings, or certifications.</p>
44	Describe any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation of certification (as applicable) in the document upload section of your response.	<p>We understand the significance and value of Women or Minority Business Entity (WMBE), Small Business Entity (SBE), and veteran-owned businesses as part of a government entity's approach to equal opportunities. CAI supports these partnerships via engagement with our Supplier Network for candidate placements.</p> <p>Our supplier networks encompass a diverse array of WMBEs, which are readily accessible for engagement based on client preferences and requirements. Priority is given to incumbent or existing WMBEs already collaborating with the client for requisition fulfillment. Should additional resources be necessary, we have a robust pool of WMBEs from which to draw to meet those specific needs.</p> <p>CAI is committed to diversity, equity, and inclusion across the business. We have a corporate Supplier Diversity Program with defined processes, fostering the use of a wide range of diverse suppliers (i.e., minority-owned, women-owned, etc.). We also help clients attain diversity goals in their business. Each client has specific criteria for targeted supplies. Most include minority-owned and women-owned. Indiana also includes Veteran-owned firms; Virginia also includes small businesses. The District of Columbia gives specific preference to local DC-based businesses. The accompanying chart in Attachment B – Graphics Book; Figure 5 – Representative Use of Targeted Firms in 2023 summarizes the impact our MSP services had for four of our clients last year. This is the type of impact we believe we can implement for Sourcewell as part of the new MSP program.</p>
45	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	<p>CAI's success in the MSP space has been based on a superior combination of value and quality of services. Our long-term strategy within the MSP market remains consistent; we will seek partnerships with clients that place an emphasis on best value and quality service, using highly developed tools, heavy client interaction and participation, and an ongoing commitment to continuous improvement. The CWS practice will stay abreast of contingent workforce trends and innovations through insight provided via our memberships with SIA and Gartner. We will help drive improvements and enhancements with the tool through our seat on their Client Advisory Board (CAB).</p>

Our long-term, strategic plan for our MSP offering has been shaped by our experiences over the last 20 years, as well as our analysis of trends within the MSP market. CAI's MSP practice has and will continue to investigate and implement process changes and take advantage of technologies deemed to be beneficial to our overall service. Three key components of our MSP program's future vision and strategic plan include:

- Increased automation, by researching and integrating ServiceNow, Robotic Process Automation (RPA) and AI into our MSP model
- Leveraging the talent ecosystem by offering employer-of-record/payrolling services and investigating direct sourcing options
- VMS enhancements by reviewing both existing and new functionality against the needs of Sourcewell to support a streamlined and efficient workflow

Increased Automation

CAI is heavily invested in ServiceNow and has a proven ServiceNow practice. ServiceNow provides 'PaaS' solutions that, among other things, improve service management and enhance workflows for organizations. With our knowledge and experience in creating ServiceNow solutions nationwide, we have developed and implemented a Supplier Management Portal for our MSP programs. The Portal provides our Contractors with a self-service platform that streamlines the program enrollment workflow, enhances interactions with the CAI Vendor Management team, and allows our Contractors to be active participants in maintaining their contractual documentation.

The following primary features were part of the first release of the Portal:

- Ability for Contractors to enroll in any MSP program with minimal support from CAI staff
- Ability for Contractors to submit required items for program enrollment and manage these items directly within the portal
- Workflows that enable CAI staff to track requests, provide feedback to Contractors, and approve/reject enrollment documents
- Ability for Contractors to self-manage their internal users within the application
- Automatic notifications to Contractors about expiring documentation
- Automation to store documentation in SharePoint Online as well as retrieve documents without CAI staff involvement
- Visibility and reporting capability on the status of every Contractor and program enrollment

RPA is an emerging form of business process automation based on the notion of software robots or other forms of AI. CAI currently uses AI in our District of Columbia MSP to automate the submission of invoices directly into DC's systems. We also use AI to automate our back-office process of auditing the data stored in the VMS and our financial system, Workday. Robotics are used to validate the rates on both agency and supplier invoices, reducing the potential for human error. These RPAs have improved accuracy and speed for our programs, and we continue to evaluate our internal back-office processes on an ongoing basis to determine additional candidates for automation. VectorVMS uses AI as part of their candidate compare functionality.

Speed to Market

A key focus for CAI and the success of its existing Sourcewell program is the speed with which we can implement the solution for a participating entity. Speed to market is key. The staffing candidate market is driven by the candidates when demand is high. CAI's solution sees a new participating entity and is able to use the solution the same day the participating addendum is signed. Once approved, the application is available and ready to be used via any browser. The requirements, rate cards, and other items are built into the system ready to go. Specific information for the entity may be required to be amended or created, but the solution is available for the entity to use and fully supported by CAI staff as they get to know the program.

Employer of Record/Payrolling

To balance the dynamic shift in workforce engagement and the ever-changing needs of our clients, CAI can serve as a worker's Employer of Record (EOR), placing us in a position of being legally responsible for paying an employee who is performing work for a participating entity, assuming conditions are right to do so. More than just 'payrolling', an EOR has the responsibility to manage taxes, benefits, insurance, onboarding and compliance activities, and other administrative tasks of a worker. CAI offers EOR services for candidates referred from a Member, for candidates with previous service returning to a participating entity, or for participating entity employees converting to 1099 status.

VMS Enhancements

A VMS solution needs to have processes that are intuitive and easy for new users to adopt, and (like an MSP) needs to constantly evaluate the market and implement new functionality/enhancements to benefit its customers. CAI recognizes that we need to continually examine both the new features being offered, as well as existing application functionality that may not be currently utilized and evaluate their value to the participating entity. Enhancing user reporting, rolling out the mobile application, implementing new functions within the application, and refreshing our documentation will be a large focus for

		<p>implementation of the new program.</p> <p>Enhanced Reporting Working with each participating entity, CAI will make self-service reporting a focus under the new program. We will give access to the reporting library available in Vector's Business Intelligence to those users who would like the ability to run their reports. We will give report creation authority and training to those users who would like to build their reports. This new access will supplement the data reporting support already provided by CAI's Analytics team. As in the current program, we will continue to provide our analytics services, including the creation of new reports and providing ad hoc reports on behalf of users who do not wish to do this on their own.</p> <p>Documentation Updates CAI will provide several improved process guides and videos to enhance the user experience across the program. These resources will further the adoption of program processes and procedures.</p> <ul style="list-style-type: none"> • Subcontractor Handbook • New/updated training videos • New/updated training guides providing more detailed instructions <p>As can be seen, CAI has significantly progressed in the unique features its MSP programs now offer compared to 2017. We have built upon technological capabilities, as well as those tasks and features that are intrinsic to everyday use, making them more practical and functional. We have developed new ways of enhancing the hiring process for contingent labor and have used technology to improve the efficiency and accuracy of our tasks.</p>
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Table 9: Performance Standards or Guarantees

Describe in detail your performance standards or guarantees, including conditions and requirements to qualify, claims procedure, and overall structure. You may upload representative samples of your performance materials (if applicable) in the document upload section of your response in addition to responding to the questions below.

Line Item	Question	Response *
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<p>46</p>	<p>Describe any performance standards or guarantees that apply to your services.</p>	<p>Measuring and setting performance expectations is key to the success of the contract. Success criteria can come in various forms, however, what is relevant to each is the patterns and trends that they produce so we can see where we are successful or where we need to address challenges to improve.</p> <p>We will tailor our approach to be responsive, using the established metrics from our similar MSP programs to establish a benchmark for growth and performance. CAI's MSP model promotes transparency into every aspect of our services and solution through our Reporting capability. We provide reports for all aspects of our service, offering detailed insight to stakeholders. The table below applies to CAI performance and the performance targets, calculation, and frequency of reporting per metric.</p> <p>As well as establishing performance metrics to benefit Sourcewell so that stakeholders can understand program success, CAI also takes the approach that program satisfaction is another great indicator of success. Often, we learn things through subjective feedback that a data set might not highlight. This consultative feedback and transparency really enable CAI to focus on the program and each user within the program so that we can bring the value Sourcewell expects for its Member community.</p> <p>CAI may conduct quarterly performance reviews with the Member community. We will present the recorded metrics and discuss the factors around the data gathered, how it came about, what influences might have affected the data, if corrective action is required for any measured area, known or upcoming changes that might affect measured areas, as well as any other items for discussion.</p> <p>We also utilize the internal touch points of our VMS tool to capture the raw metrics for our services. The basic business rules for our MSP engagements align on identical attributes (i.e., speed, quality, and accuracy). As a result, we create a custom dashboard for each Member and use Microsoft Office products to produce our charts and graphs. CAI measures customer satisfaction through automated Candidate Surveys.</p> <p>Measuring Customer Satisfaction with Placed Resources The CAI Account Team reviews and analyzes the results of online surveys provided to Authorized User feedback for trends and areas for improvement with respect to the contracted resources placed in agencies and other organizations through the MSP contract. An example of the evaluation screen is shown in Attachment B – Graphics Book; Figure 6 – Resource Evaluation Screen.</p> <ul style="list-style-type: none"> • An online survey form is sent after the first month of an engagement. This survey provides information on early detection of issues with misplaced resources. • An online survey form is sent after the end of an engagement. This survey measures how well the resource performed, which is an indication of a good skills match, quality of work delivered, and customer satisfaction with the hiring process. • Agency users of the contract with engaged resources are asked to complete automated evaluations at various (configurable) points throughout a resource's engagement. These evaluations are fully customizable within the VMS system. An example is shown in below. The scores for completed evaluations are stored in the VMS system and can be reported on (much like all other data in the system). • SLAs <p>In some cases, a Customer Satisfaction SLA is included in the contract. We then compile the results of surveys and report them on a quarterly basis along with the metrics on all contract SLAs.</p>
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<p>47</p>	<p>Describe any service standards or guarantees that apply to your services (policies, metrics, KPIs, etc.).</p>	<p>CAI's methodology provides ongoing quantitative and qualitative analysis of our MSP Performance. Our performance standards fall within four categories: SLAs and KPIs, Customer Satisfaction, Provider Performance, and Program Management/Continuous Improvement. Quantitative measurements are captured through detailed reporting in VectorVMS® and can be provided through various reporting activities.</p> <p>CAI's overall performance as the MSP is contractually measured through defined SLAs for each participating entity. We apply the internal data points in our VMS tool to capture metrics on our services that are measured against the contractual SLA targets aimed at speed, quality, and accuracy.</p> <p>In addition to SLAs, CAI tracks and reports on several KPIs. KPIs are additional metrics used to monitor the ongoing activities of our MSP program and can be viewed as performance trend indicators that drive improvement in process performance and/or program improvement. Examples of KPIs currently measured under our programs are staff augmentation hiring cycle times, SOW requisition and engagement cycle times, SOW milestone approval rates, staff augmentation and SOW requisition response rates, and provider participation rates.</p> <p>Should review of these performance measurements highlight consistent trends leading toward failure, and if the provider has not remedied the situation after mentoring, then CAI will notify the provider of our intent to terminate the relationship. We discuss Supplier Metrics in the following narrative.</p> <p>Contractor Metrics and Performance CAI generates metrics detailing performance for both internal and external usage of Supplier performance. Performance for staff augmentation Contractors is measured through BI reports generated by VectorVMS. The Supplier Scorecard and Manager Dashboard measure performance across various standard recruiting metrics such as: number of candidates submitted, number of candidates forwarded to the agency, number of candidates selected for interview, and number of candidates hired. Submittal numbers determine whether Contractors are actively participating in the program. Ratios of candidates submitted vs. candidates forwarded and candidates interviewed vs. candidates hired point to a firm's ability to match candidates with job descriptions and the quality of their recruiting and screening processes. We track metrics on requested but declined interviews, interview no-shows, offers refused, false starts, performance removals, and attrition. These metrics give additional insight into a firm's ability to accurately measure a candidate's commitment to Sourcwell and Member opportunities but also offer CAI insights into current market trends (i.e., if candidates are interviewing for and receiving multiple offers).</p> <p>CAI uses the Vendor (Supplier) Scorecard to monitor a specific Contractor's performance. The scorecard highlights specific points of performance – both positive and negative – and enables the Contractor and the MSP to discuss and evaluate performance and potential areas of improvement. This scorecard is frequently used by the CAI Account Management team when meeting with Contractors to discuss their performance and provide coaching, as it provides detailed insight into where a Contractor is performing well or may be struggling.</p>
<p>48</p>	<p>Describe your recruitment and vetting process.</p>	<p>As a technology and professional services firm, CAI recognizes that human capital is the foundation of our success. Within CAI, recruiting is valued as a core competency and our world-class recruiting program supports it. Our highly skilled recruiters design and implement a recruiting strategy based on the specific needs of our clients. CAI's recruiters locate and hire highly qualified talent in the marketplace.</p> <p>Internal (CAI) Hiring Process Recruiters initially screen candidates through a phone interview to ensure that they understand what CAI is looking for and that the candidate is willing to meet the high level of performance that our clients expect of CAI associates. Based on the specifics of the talent requirement and established key skills and abilities criteria, the CAI recruiter will discern whether the candidate is viable. For individuals with disabilities, we have specialized recruiting staff trained to interact with candidates using multiple modes of communication. This includes conducting interviews in an unhurried and somewhat more structured fashion, as needed.</p> <p>CAI will perform technical examinations and interviews when required by the requisition and/or hiring manager. We use SMEs from various CAI technical teams across our organization for technical assessment. We will question around the specifics of the role presented by the hiring manager, ask any technical questions needed, and drill into details with the candidate. We may ask the candidate to present experience or respond to scenarios so that we can fully understand their capability and limitations. These may also include a skill assessment test as relevant for the position. We document the results of the screenings and provide detailed feedback to the hiring manager on completion.</p> <p>Just before or after the technical interview, the recruiter meets with the candidate,</p>

further describes the position, and obtains the necessary permissions from the candidate to complete the required background checks. CAI checks educational and employment history, including references, as well as proof of citizenship or valid work permit. We establish a contract-specific checklist for prerequisites and use it as part of our recruiting guidelines. This includes background checks, drug tests, and any other items required for all candidates, such as child support payment background, education, degree, or certification checks. We use an external service provider to execute drug testing, reference checks, and similar screenings.

During the recruiting process, the candidate receives a complete position description that provides an understanding of the job expectations, location, compensation, and duration. The recruiters review each item with the candidate to ensure a clear understanding. Candidates selected for employment with CAI receive customized compensation packages. Some candidates prefer to be full-time salaried associates with a full benefits package; others prefer hourly employment with a partial benefits package. The recruiters will provide information on CAI's benefits, our clientele, and any additional information needed for the candidate to understand CAI's environment and culture. During the interview process, the candidate will have an opportunity to speak to CAI representatives at various levels to obtain a better understanding of CAI.

Hiring for Requisitions

CAI's MSP program employs a structured process to track background and security checks/compliance, ensuring all contingent workers meet the necessary requirements before they begin an assignment.

Resumes are filtered through automated and manual methods to ensure candidates align with job criteria. CAI is responsible for evaluating submissions from the supplier community and selecting the most qualified candidates for Hiring Manager review, based on resume review, verification of resume details and other submission forms, the VMS functionality for candidate comparison, and in-depth candidate review.

The MSP program includes standard types of background checks, such as E-Verify, SSN Trace, National Criminal Records Search, National Sex Offender Registry Search, County Criminal Search, and Urinalysis Drug Screening. These will be set at a baseline level and can be customized per Staff Augmentation/SOW release.

Resources' credential verification begins with the attestation of the supplier submitting the resource and the attachment of the claimed credentials. The CAI Account Manager performs a quality review of the claimed credential and may review further independently when warranted. We use the VMS to manage and control the information about candidates, their skills and certifications, and all data needed to confirm their qualifications for the position. For each requisition, the VMS has a checklist of onboarding items; an example appears in Attachment B – Graphics Book; Figure 7 – VMS Candidate Onboard Checklist. CAI uses the VMS Compliance Manager feature to store the verified credentials and, if applicable, monitor for renewal. CAI utilizes a VMS to record and track the completion of screening items through its Compliance Manager functionality. This system allows for easy identification of incomplete screening tasks through alerts/reporting. If onboarding items are not complete, the resource cannot be engaged in the system.

The MSP program incorporates mandatory screening criteria into the SA, which is signed and agreed to by the approved suppliers within the network.

Background Screening

Our standard background check investigates multiple aspects of the candidate's history, as summarized in Attachment B – Graphics Book; Figure 8 – Background Screening. We will confirm specific requirements during the implementation period and ensure that all providers document the results for each candidate.

Fingerprinting

Some positions may require fingerprinting, as determined by the Hiring Agency and Manager, such as positions with access to Personal Identifiable Information (PII).

Additional Certification(s)

Much like the items listed previously, we will use the Compliance Manager function within the VMS to control any additional documents or certifications. The accompanying image, Attachment B – Graphics Book; Figure 9 – VMS Candidate Compliance Tab, is part of the "Candidate Compliance" tab, showing required and optional documents, credentials, and other certifications. Some items may be required for all candidates, such as the criminal background check, and others will be specific to the position.

We will work with Sourcewell clients to confirm the specific certifications required. We will review the certifications as part of reviewing the candidate and confirm they are currently valid (i.e., prior to releasing the candidate for review by the clients).

We also use the Compliance Manager function to enforce recertifications as needed. For dated requirements, the VMS automatically generates alerts to remind the provider about expiring certifications and ensure they are completed in a timely fashion, which occurs at no expense to the clients.

Table 10: Payment Terms and Financing Options

Line Item	Question	Response *
49	Describe your payment terms and accepted payment methods.	CAI's standard payment terms are net 30. However, we understand that Sourcewell Participating Entities may have differing requirements for payment terms, and therefore, we are flexible, dependent on Entity purchasing guidelines or requirements. Payment terms will be finalized in each Participating Addendum. CAI prefers electronic payment to ensure accuracy and expedite the process. However, we can accommodate payment by check should it be required or necessary in unusual circumstances. We can also accept P-card and ACH payments.
50	Describe any leasing or financing options available for use by educational or governmental entities.	This is not applicable to the services we are proposing.

<p>51</p>	<p>Describe any standard transaction documents that you propose to use in connection with an awarded contract (order forms, terms and conditions, service level agreements, etc.). Upload a sample of each (as applicable) in the document upload section of your response.</p>	<p>CAI has provided several sample documents that will form part of the standard transaction package that we use for each participating entity. These documents are located in Standard Transaction Documents in the portal. Documents are often customized to each participating entity's requirements when they sign a participating addendum. Documents will also be tailored for new contracts to include any new terms as part of the agreement.</p> <p>Sourcewell Subcontractor Agreement</p> <ul style="list-style-type: none"> The SA, Attachment F – Sourcewell CWS Subcontractor Agreement Template, defines the terms, processes, compensation for resources, insurance, payment, as well as includes the latest rate card according to the agreed contract between Sourcewell and CAI. The SA is subject to change throughout the contract period should terms between Sourcewell and CAI change. The SA ensures the Contractor is protected, treated fairly, and understands their obligations, as well as CAI's obligations to the Contractor. <p>CAI Sourcewell Statement of Requirements Template</p> <ul style="list-style-type: none"> The SOR template, Attachment E – CAI Sourcewell SOR Template, allows the Participating Entity to define the requirements for a project that they wish to have completed via outsourcing to a Contractor to complete. The template defines all the key tasks that need to be met, the questions to be asked, and provides steps to describe the requirements so that each Contractor can provide a complete response and be fairly evaluated against other Contractors. <p>CAI Sourcewell Statement of Work Template</p> <ul style="list-style-type: none"> The SOW template, Attachment D – CAI Sourcewell SOW Template, provides the Contractor the opportunity to offer contingent workers who will deliver a project requiring multiple skill sets to complete in a given time frame. The work products will be in the form of deliverables, and payments may be made against completion of those deliverables or progress against the project. The document provides guidance for all information to be completed so that Contractors who can respond to SOW tasks have enough information to provide an SOW response and pricing to deliver the work. <p>Example Service Level Agreement – State of Iowa (Sourcewell)</p> <ul style="list-style-type: none"> CAI has provided a copy of Service Level metrics created specifically for the State of Iowa in Attachment G – CAI Sample Sourcewell SLAs. The State of Iowa engaged CAI under the Sourcewell program. Working in collaboration with the State, our metrics are driven by best practices as well as aiming to set a high standard of service for Iowa. The performance standards target industry benchmarks, such as Resume Submittal Response Time, Round One Fill Rates, Accurate Billing, and Customer Satisfaction, among others. For example, Resume Submittal Response Time is the measurement of time from receipt of request to delivery of candidate resumes. We set the Standard as 4 business days to provide the top 3-5 candidates from our Contractors. The Performance Target is to meet this criterion a minimum of 90% of the time, measured across a Quarter. <p>Example Policy Document – Sexual Harassment Acknowledgement</p> <ul style="list-style-type: none"> CAI is cognizant of its responsibility to treat everyone in the workforce with dignity and respect. To that end, we have developed multiple policies that set the standard of how we interact with each other, our peers, our co-workers, our customers, and our partners. We set a high standard. As shown in Attachment C – State of Georgia's Statewide Sexual Harassment Prevention Policy Acknowledgement, the State of Georgia requested that all CAI employees and Contractor employees review and agree to comply with Georgia's statewide Sexual Harassment Prevention Policy. In addition, training was also required to be completed on a yearly basis. The attached document is the attestation form provided to all CAI employees, Contractors, and Contractors' employees to be completed. CAI aims to develop similar documentation for each participating entity dependent upon their requirements according to state and local law, as well as individual participating entity guidelines.
<p>52</p>	<p>Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?</p>	<p>Yes. CAI can accept the P-card procurement and payment process. Fees will apply in the use of the P-card. We will work with each Sourcewell Participating Entity to understand their procurement guidelines and how the guidelines apply to transactions under the Sourcewell Contract. Applicable P-card fees will be resolved in the Participating Agreement.</p>

Table 11: Pricing and Delivery

Provide detailed pricing information in the questions that follow below. Keep in mind that reasonable price and product adjustments can be made during the term of an awarded Contract as described in the RFP, the template Contract, and the Sourcewell Price and Product Change Request Form.

Line Item	Question	Response *
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<p>53</p>	<p>Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.</p>	<p>We propose a pricing model using research data gathered by the Economic Research Institute (ERI) that is competitive and realistically reflects local labor compensation requirements across the regions and states. We also propose a pricing model that allows Sourcewell to support its Canadian Participating Entities. There is no industry standard pricing, so therefore, no Sourcewell discounted price is offered.</p> <p>CAI uses salary data from ERI as a means of determining baseline wages. The ERI is an independent research firm whose algorithms and data have been in use for the past 30 years; it does not offer consulting services (i.e., it has no self-directed incentive for modifying its metrics). In our many years of providing MSP services to various government agencies, we have found the ERI data to be extremely accurate for estimating salaries by position description and geographic location.</p> <p>CAI then determines the vendor rate by deriving the markup on the wage rate that covers all costs and obligations that any employers must pay prior to calculating a profit. In developing a subcontractor markup for the contract, we created a formula to cover their payroll costs, employee benefits, contract expenses, and modest pre-tax profit. This becomes the rate per hour that the vendors are paid for their selected resources. Unlike other MSP programs, the vendor receives 100% of the CAI vendor rate with no reductions made to their invoices.</p> <p>It is upon this vendor rate, or labor rate per hour, that the MSP service fee is applied and becomes the bill rate to our customers. The MSP service fee covers the cost of doing business for CAI. These are reasonable costs for doing business, such as our own labor costs, as well as administrative fees for the VMS tool.</p> <p>CAI analyzes the ERI data and makes recommendations to our customers regarding increases or decreases to the contract rates. The final decision on changes to rates rests with the customer; CAI adheres to those decisions. We will continue to conduct these reviews on a frequency that is acceptable to the customer.</p> <p>Canadian Pricing Model CAI's developed pricing model has minor differences between Canada and the U.S. The concept – an hourly rate all-inclusive of fees – remains the same. The hourly rate is multiplied by number of hours required to meet the requisition. To develop the proposed rates, CAI has used data from ERI, which provides concise and accurate details of market rates both within the U.S and Canada.</p> <p>The significant difference in pricing models that CAI proposes is the variation in country currency and exchange rate. In addition, the applicable tax varies for each country, and each state or province within each country, dependent on currency used and national and local tax laws and employment laws by state or province. For example, CAI will work with the each Sourcewell Participating Entity and supplier to establish the process regarding overtime and overtime pay. Overtime rules are driven by the employing organization and dependent on the state or provincial laws, too. We will establish up front how this is to be operated, and it will be included in the SA with the supplier who represents the resource performing the work.</p> <p>For a contract that is used to acquire resources to perform services, items are not associated to a SKU but rather a job title. CAI proposes a list of industry-relevant job titles grouped by functional area that are broad enough to encompass the needs of any IT organization. Participating entities will select one of three pricing 'financial tiers,' which will align them more closely with pricing for their location.</p>
<p>54</p>	<p>Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.</p>	<p>CAI has provided a tailored pricing solution for Sourcewell with a not-to-exceed rate card. The pricing is based upon T&M and customized to labor categories and geography.</p> <p>MSRP does not apply to IT MSP services. We do not provide MSRP or published list prices; therefore, we do not have a scale to discount against. Our pricing proposal is presented against the very latest pricing data provided by ERI.</p>

55	Describe any quantity or volume discounts or rebate programs that you offer.	<p>CAI can provide discounts based on volume of engagements. Upon reaching specific thresholds, CAI can provide a rebate for usage. This will be determined during the kickoff with each Sourcewell Participating Entity so that we can set the thresholds based on expected requirements.</p> <p>The rebates will be returned at the highest organization level, and the organization will reimburse the particular Participating Entity that used the service.</p>	*
56	Propose a method of facilitating "sourced" products or related services, which may be referred to as "open market" items or "nonstandard options". For example, you may supply such items "at cost" or "at cost plus a percentage," or you may supply a quote for each such request.	<p>CAI can provide 'sourced' services. CAI determines this as the Sourcewell Participating Entity requesting a specifically named resource with whom they are familiar. We will ask the supplier who represents the resource to provide availability, and if the requested resource is available, the resource can be engaged. The PO process and payments remain the same according to the rate card.</p> <p>In some instances, an exception is required when a labor category may not meet the requirements of the Sourcewell Participating Entity. Our rate card is very broad with the goal of encompassing all potential requirements; however, should a new skill set be needed, we will quote on an individual basis using pricing data from available resources. The new labor category can then be added to the Sourcewell Participating Entity's rate card.</p>	*
57	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	All pricing is included in the pricing proposal. No additional costs associated with any services for implementation and installation, training, delivery, or otherwise are to be expected.	*
58	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	Freight, delivery, and shipping costs are not applicable to the services CAI is proposing on this Contract.	*
59	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	<p>To provide the proposed services, CAI's process only differs in that Canadian delivery requires a change in payment and billing activity due to the value of the Canadian dollar.</p> <p>Provision of services to Alaska and Hawaii may be affected by the ability to find local staff that have the skill sets to meet the Sourcewell Participating Entity requirements. In some instances, the Sourcewell Participating Entity will have to allow for a travel budget or for the resource to work remotely to find the correct skill set. Travel expenses can be submitted to allow for auditing and Participating Entity policy requirements for travel and reimbursement.</p> <p>As the RFP reflects the potential interest and usage by Canadian provinces, CAI will establish a 'provisional' rate card based upon the same proposed labor categories for the U.S. market but using current Canadian labor rates. However, CAI would suggest that an approach to Canadian and foreign markets would be to agree to a currency exchange rate at the start of each Participating Addendum, which will then be in place throughout the period of performance. Should a Participating Addendum be renegotiated, extended, or change in requirements be requested, CAI and the Sourcewell Participating Entity will reevaluate the exchange rate to ensure that the rate is being best reflected. This approach allows for fluctuation in the currencies being used and will serve the best interest of the Sourcewell Participating Entity, who may not wish to be locked in to set rates for the entire four years.</p>	*
60	Describe any unique distribution and/or delivery methods or options offered in your proposal.	CAI's proposed model is based upon an open enrollment supplier pool that is nationwide and non-restrictive. Upon meeting basic business approval criteria, CAI will on-board all suppliers who can provide the skill sets identified by Sourcewell. This approach allows us to capture significant small and disadvantaged business participation from across the country.	*

Table 12: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
61	b. the same as the Proposer typically offers to GPOs, cooperative procurement organizations, or state purchasing departments.	Please see Attachment I – CAI Pricing Model.

Table 13: Audit and Administrative Fee

Line Item	Question	Response *
62	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed Contract with Sourcwell. This process includes ensuring that Sourcwell participating entities obtain the proper pricing, that the Vendor reports all sales under the Contract each quarter, and that the Vendor remits the proper administrative fee to Sourcwell. Provide sufficient detail to support your ability to report quarterly sales to Sourcwell as described in the Contract template.	CAI has self-audit methods we use throughout our process to ensure compliance with the Sourcwell contract. The administrative fees are generated through CAI's financial system, Workday, and validated with the agreed upon administrative fee for this contract. We will leverage the same business process and auditing methods currently in place from our current Sourcwell contract to ensure compliance for Sourcwell and its participating entities. Beyond internal self-audit procedures, CAI undergoes rigorous external audits of its financial and technical operations, having secured various certifications, including SOC 2 Type 1, among others, to ensure excellence and compliance in its service delivery.
63	If you are awarded a contract, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the contract.	<p>With the experience of working with Sourcwell, CAI will continue to develop the internal metrics we use to measure and monitor how successful the program is and any developing trends so we can capitalize further.</p> <ul style="list-style-type: none"> We will track the successes of our marketing efforts using metrics on the number of contacts during a marketing campaign, how many resulted in conversations, and how many led to engagement of CAI and Sourcwell to deliver the services through the resulting contracts. We use Workday to track our financials. Our financial team created PowerBI reports to track growth month over month and year over year. We produce forecasts three to six months in advance and compare our actuals against our forecasts each month. We implemented Salesforce in 2020 to manage and measure our ability to capture, retain, and grow new business opportunities. Salesforce has helped CAI refocus and strategize our approach to our clients new and old alike. Greater accountability is given to client success and satisfaction through our specific workflows. The new opportunities are reviewed and measured so that we can provide the correct level of engagement and support, and to ensure we are always responsive and efficient with accountability for success held by senior management. We will track and report on all available fields within VectorVMS to ensure that our services are consistently meeting the established SLAs. This comprehensive analysis will enable us to monitor our performance across various metrics and dimensions. Additionally, we will evaluate vendor performance, candidate satisfaction scores, and any cost-saving outcomes. This thorough approach not only ensures transparency and accountability but also fosters a culture of continuous improvement within our organization. By proactively addressing any discrepancies between our actual performance and the SLAs, we can maintain a high standard of service delivery that aligns with client expectations and our commitment to excellence.
64	Identify a proposed administrative fee that you will pay to Sourcwell for facilitating, managing, and promoting the Sourcwell Contract in the event that you are awarded a Contract. This fee is typically calculated as a percentage of Vendor's sales under the Contract or as a per-unit fee; it is not a line-item addition to the Member's cost of goods. (See the RFP and template Contract for additional details.)	CAI is proposing a 1% Sourcwell administrative fee to be calculated as a percentage of our sales under this contract.

Table 14A: Depth and Breadth of Offered Equipment Products and Services

Line Item	Question	Response *
65	Provide a detailed description of the equipment, products, and services that you are offering in your proposal.	<p>As an industry recognized Company providing Managed Services and Contingent Workforce Solutions, CAI will continue to offer its full range of services. Since 2016, CAI has capitalized on its extensive experience and expertise through its partnership with Sourcewell, providing a suite of MSPs, SOWs, and Direct Placement Services. The enduring success of this collaboration is attributed to CAI's unwavering focus on customer satisfaction and its commitment to customizing solutions to meet the distinctive requirements of each client.</p> <p>CAI offers a full-service model of Managed Services and Contingent Workforce Solutions to Sourcewell and members. This means defining the business processes for procuring contingent labor as well as managing the supply chain through the MSP. We automate the supply chain, configuring the VectorVMS® tool – retaining our existing platform – to support the Members' goals and objectives. CAI will evaluate each Member independently as we engage with them and determine the requirements for Account Management on a case-by-case basis. Our Account Managers role will be to provide the consultation needed to ensure that the process is operating smoothly and that suppliers are getting the correct information so that they can provide personnel able to perform in the required roles. The growth we have seen with the City of Long Beach, CA is a prime example of the importance and success of the account management function. Below we describe the key components that make up our services.</p> <p>Temporary staffing across 143 discrete positions, nationwide. We will provide temporary staffing services for professionals based on specific requirements from the requesting Member agency. We will fill positions via a nationwide subcontractor network that has already been established for this contract. In bidding, we have retained our current labor categories but have adjusted based on Member feedback for newly identified roles or skills, as well as removed roles that are not used or no longer required. Sourcewell and its Member community will continue to benefit from a range of resources that can meet unexpected short-term needs through to longer, bespoke engagements.</p> <p>Our goal throughout has been to support the Member community with qualified staff, who can engage quickly and bring the value, experience, and skills needed to fulfill a need. Having managed the program successfully since 2016, we have developed an understanding of Member requirements, as well as their expectations and how best to meet them. This is met with high retention rates, first time fills, competitive rates that the Member can support, and strong account management that can translate Member information and needs into a statement of requirements that the resource understands and the subcontractor network can fill.</p> <p>We are also prepared to supply additional types of labor should Sourcewell and its Members identify further needs not covered under the new contract but driven by new technologies as the contract progresses into later years.</p> <p>Large network open to Suppliers across the nation. CAI has served as a partner to Sourcewell, and by extension, a partner to those Members who have used our services to date. This is evident based upon the spend driven by such Members as City of Long Beach, CA and Orange County Fire Authority, CA, who have significant spend through the program. However, what really proves the program's success is those Members who have engaged for smaller, unique requirements. This was a driver in the original program: providing services to local and county government who could not participate in a large state-wide MSP program due to higher fees, difficulties with approvals, or the simple need for very short-term engagements that do not align well with a major program.</p> <p>We will retain a vendor-neutral process designed to provide Members with qualified, cost-effective contingent staff. As the MSP, we will operate a staffing network that is open to all qualified firms, following the successful provision of qualification criteria and documentation. The current subcontractor has a proven agile and flexible network when supporting Member requirements to date. CAI will review the current network, ensure that current subcontractors are adding value, and make recommendations and changes to increase the value and capability of the subcontractor network.</p> <p>Contractor Information Site and Self-Service Management Portal. CAI has maintained a public-facing website for each MSP program with contract data and rate information since signing our first MSP contract in September 2004. This will continue for Sourcewell and its Members throughout the new contract. Our initial goal was to ensure consistent communications with the supplier network, but the portal has since turned into a "one stop" location for all key information related to any MSP program. As a partner with our public sector clients, we are also</p>

pledged to transparency across the procurement chain. Suppliers can easily see detailed information about all contracts, job categories, labor rates, etc. This includes performance metrics on themselves and all other vendors – a form of absolute transparency across the supplier community.

CAI also provides a hosted self-service portal where suppliers can provide their enrollment information, including documentation required for the specific state contract. It serves as a repository for contract and compliance documents.

Engagement with the small and diverse business community. For diverse suppliers, we have confirmed their credentials. Our goal is to act as an incubator or mentor to small, diverse businesses, encouraging their participation and promoting their usage where appropriate. We will review this information with Sourcewell as part of contract development, identify relevant flow down requirements, and develop a standard subcontract for use by all participating subcontractors. We will then utilize this for the life of the contract with the supplier community, which provides a fully transparent means of scrutinizing suppliers and broadening the number of subcontractors who may wish to participate after contract execution.

Account Management. We will continue to provide an Account Management team that is 100% dedicated to Sourcewell. Our Account Management team will continue to be spread nationwide to service Members as needed. Our Account Management team is further supported by our CWS Operations and Analytics teams as well as CWS leadership. This allows CAI to be responsive and resolve questions and issues quickly, placing the Member central in the process. CAI's staffing plan ensures a deep understanding of Member-specific needs by assigning dedicated account managers as the program grows. Our Account Managers are tasked with working closely with Members to fully understand their environment, projects, skill sets needed, cultural environment, procurement, and financial processes. Our in-depth knowledge of the agency, procurement, and financial processes enables us to deliver better quality staff augmentation resources and SOW projects faster and more efficiently.

Our staffing plan further improves delivery utilizing the Account Manager's experience and knowledge of staff augmentation and statement of work requirements for the Members. Our Account Managers have years of experience in the Staffing industry and have all served as recruiters. They have broad knowledge of the markets, local staffing firms, and local talent. They understand the challenges our suppliers face in delivery because they have been in that role themselves; as a result, they can provide coaching and mentoring to our partner firms on how to be successful under the program. This all adds up to a better, faster service for Members and Sourcewell.

Comprehensive MSP management system, available 24/7. Our solution also includes an integrated set of software tools to manage the process that is already familiar to Sourcewell and its Members. The continuation of understood and proven technology stack adds value to Sourcewell. It is easy for Sourcewell to sell services they understand and are familiar with; the Members know how to engage with the system and do not have to manage change to a new product. Both Sourcewell and Members know that it integrates with their current environment. CAI is offering continuity and flexibility in a seamless transfer from one contract to another, a value that will be felt by Sourcewell Members. All components of the VectorVMS® application operate in highly secure cloud environments located in the U.S. These include the following:

- Workflow/Contract Management Tool. We will continue to utilize VectorVMS®, an industry-leading VMS that allows us to streamline the entire requisition process. It is a cloud-based ecommerce site available 24/7 to all Members. This is the primary tool that Members will use for documenting requirements for contingent staff (i.e., requests for IT professional staff; reviewing resumes; and approving timesheets). It is available via web browser as required. Hiring agents can also use the mobile app, if desired, to perform routine functions such as approving timesheets, requisitions, and expenses.
- Financial and Accounting (F&A) System. VectorVMS has a direct interface with our ERP system, Workday, which is the source of financial transactions for our business. Contractors can then easily track upcoming invoice payments for labor performed by their employees. We generate their invoices to CAI directly aligned with the invoices we send to state agencies. We also generate this data electronically to enable them to easily balance invoices within their own F&A systems.
- Reporting. The core VectorVMS module has 115 standard reports. Many reports contain both representative data and summary graphics. The sections below depict some of those we believe are most relevant to Sourcewell and its Members. These examples are generated using configuration information relevant to Sourcewell based upon current contract details or based upon example information from another MSP program to illustrate the point; please note: we have modified the content to prevent disclosing information on specific individuals or vendors.
- Member Overview. We can provide Sourcewell with a Member Overview report;

see Attachment B – Graphics Book; Figure 10 – Sourcewell Member Overview Report. It is a high-level view of the contract across all members, locations, requisitions, and Contractors, as summarized in the accompanying example.

Manager Dashboard

- The Member Manager Dashboard, Attachment B – Graphics Book; Figure 11 – Member Manager Dashboard, provides summary statistics on all engagements and open requisitions. It also provides analytics data on the engagements, timesheets for all engagements, and the status of open and pending requisitions. The bottom half of the dashboard shows vendor utilization in filling the engagements.

Other Frequently Used Reports

Other popular reports include:

- PO Audit Report

This shows hours and dollars left on the PO compared to hours and dollars within the MSP management system. It uses color coding to highlight engagements where there is an imbalance between hours/dollars on the requisitions and hours/dollars on the PO. This enables the hiring manager to adjust the PO in a timely fashion.

- Candidate Compliance Items

This lists candidates and the various documents/certifications required for their engagement.

- Overtime Timesheets Report

This shows candidates with overtime hours on their timesheet for a given reporting period.

- Supplier Documentation Report

Many of our contracts have documentation requirements specific for disadvantaged business enterprise (DBE) firms. This report tracks the expiration date of certifications on file and enables us to proactively contact vendors to obtain renewal certificates. Requirements vary by state, and given the nationwide approach to the Sourcewell cooperative, CAI will track that information within the VMS to assist Sourcewell.

Ad-hoc Reporting

We will provide Sourcewell and its Members with direct access to ad hoc reporting, as required. Members can take advantage of advanced editing capabilities to create reports and/or create new versions of existing reports (“clones”). They can create a report directly from any summary page within VectorVMS. For instance, they might see a summary page listing all their engaged resources. Using this baseline data, they can add/remove columns, and then quickly export this summary into an Excel spreadsheet. As noted earlier, their access to specific data elements is based on their role: Sourcewell has access to all data, and Members have access to their own agency’s data.

Customer Satisfaction and Performance

Our approach to customer satisfaction is discussed in Q.47, above.

Billing and Invoicing

The standard process is to produce a single invoice per PO with the data subtotaled by PO line item and Resource that is generated monthly. CAI provides invoice detail reports before the final invoice is sent, which an agency can use to validate the information being invoiced. CAI audits every invoice before it is sent to the agency by comparing the approved timesheet information from the VMS against the invoices generated from our financial system.

If a PO contains multiple line items to accommodate multiple funding sources, separate timesheet projects are configured in the VMS, allowing the Resources to enter time against the specific line items that are then reflected on the invoice.

CAI uses the integration provided via the VMS to download approved timesheet data into our Workday financial system. The timesheet detail is segregated by Member, PO number, line item, and Resource; this allows us to generate an invoice with as much detail and summarization as specified by each agency for each PO. These invoices can be emailed directly to any specified agency representative.

Resources use the MSP management system to submit their timesheets on a weekly basis. They do this using PCs or the browser interface on their smart phones. Contractors also have proxy authority to submit timesheets on behalf of their Resource.

The process for approvals is also fully automated. For Sourcewell Members, this includes four major functions:

- Timesheets

Hiring Managers should approve timesheets on a weekly basis for all temporary staff working under their supervision. They can also delegate this authority, such as coverage when they will be out of the office or on vacation.

- Requisitions

		<p>Hiring Managers must create the original staffing request. Depending on configuration, the requisition itself may require other approvals prior to release to CAI.</p> <ul style="list-style-type: none"> • Engagements <p>After reviewing candidate profiles (and conducting interviews, if desired), the hiring manager must accept the designated candidate by formally requesting him/her.</p> <ul style="list-style-type: none"> • Expenses <p>The MSP management system also allows for processing expense reports (i.e., occasions when temporary staff submit expenses for reimbursement). Any reimbursable expenses will follow state or local guidelines and require preapproval by the participating entity.</p> <p>Members can easily perform these approvals directly from their dashboard in the online interface; see Attachment B – Graphics Book; Figure 12 – My Tasks Screen. When they click on the icon, the MSP management tool launches a page with the items requiring action. In this example, the open action items awaiting approval are new requisitions; requisition with a candidate awaiting review; and timesheets for currently deployed temporary staff.</p> <p>Security</p> <p>The VMS uses role-based security to determine which reports, screens, data, and portions of the system each Member user may access. Each role in the system is determined by Sourcewell and configured during implementation. The roles are then assigned to Member users based on their required privileges. For example, when creating ad-hoc reports, the Member user is only allowed to access their data.</p> <p>CAI has summarized the benefits of its solution in the Attachment B – Graphics Book; Figure 13 – Solution Benefits Summary.</p>
66	<p>Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.</p>	<p>Typical subcategory titles may include:</p> <ul style="list-style-type: none"> • Temporary Staffing Services • Contingent Workforce Solutions • Contingent Labor Services • Contingent Labor • Consultants • Temporary Labor • Staff Augmentation • Recruitment Services • Project-Based Services or SOW Services • Direct Placement • Executive Search • Employer of Record or Payrolling • Recruitment Process Outsourcing

Table 14B: Depth and Breadth of Offered Equipment Products and Services

Indicate below if the listed types or classes of equipment, products, and services are offered within your proposal. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments
67	Professional services, such as accounting and finance, executive search, procurement, clerical, administrative, and legal and compliance	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
68	Public sector and education health, such as nursing, occupational therapy, speech language pathology, social work, pharmaceuticals, dental, and support roles	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
69	Instructional and non-instructional education, such as teaching, interpreting, paraprofessionals, special and alternative education, custodial, food & nutrition, and education administration	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
70	Skilled trade and general labor, such as construction, electricians, HVAC technicians, machinists, technicians, welders, mechanics, groundskeepers, painters, custodians, security guards and traffic management	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
71	Managed service program and vendor managed solutions, such as procurement, coordination, technology, and management of staffing services provided by various vendors	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
72	Recruitment process outsourcing, such as sourcing, screening, and hiring candidates	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
73	Employer of Record (EOR) services	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
74	Other related services or solutions that support the staffing process	<input checked="" type="radio"/> Yes <input type="radio"/> No	See Attachment B – Graphics Book; Figure 14 – CAI’s Related Service Offerings for our other related services and solutions for supporting the staffing process.

Table 15: Exceptions to Terms, Conditions, or Specifications Form

Line Item 75. NOTICE: To identify any exception, or to request any modification, to Sourcewell standard Contract terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Contract Template provided in the “Bid Documents” section. Proposer must upload the redline in the “Requested Exceptions” upload field. All exceptions and/or proposed modifications are subject to review and approval by Sourcewell and will not automatically be included in the Contract.

Do you have exceptions or modifications to propose?	Acknowledgement *
	<input type="radio"/> Yes <input checked="" type="radio"/> No

Documents

Ensure your submission document(s) conforms to the following:

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as “Marketing Plan.”

- [Pricing](#) - Attachment_I_Pricing_Model_CAI.xlsx - Thursday June 13, 2024 07:31:00
- [Financial Strength and Stability](#) - Attachment_H_Audited_Financials_CAI.pdf - Thursday June 13, 2024 07:31:31
- [Marketing Plan/Samples](#) - Attachment_A_Marketing_Plan_CAI.pdf - Thursday June 13, 2024 07:31:49
- WMBE/MBE/SBE or Related Certificates (optional)
- Warranty Information (optional)
- Requested Exceptions (optional)
- Standard Transaction Document Samples (optional)
- [Upload Additional Document](#) - Additional Documents.zip - Thursday June 13, 2024 07:32:38

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT AND ASSURANCE OF COMPLIANCE

I certify that I am the authorized representative of the Proposer submitting the foregoing Proposal with the legal authority to bind the Proposer to this Affidavit and Assurance of Compliance:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for contract award.
3. The Proposer, including any person assisting with the creation of this Proposal, has arrived at this Proposal independently and the Proposal has been created without colluding with any other person, company, or parties that have or will submit a proposal under this solicitation; and the Proposal has in all respects been created fairly without any fraud or dishonesty. The Proposer has not directly or indirectly entered into any agreement or arrangement with any person or business in an effort to influence any part of this solicitation or operations of a resulting contract; and the Proposer has not taken any action in restraint of free trade or competitiveness in connection with this solicitation. Additionally, if Proposer has worked with a consultant on the Proposal, the consultant (an individual or a company) has not assisted any other entity that has submitted or will submit a proposal for this solicitation.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest exists when a vendor has an unfair competitive advantage or the vendor's objectivity in performing the contract is, or might be, impaired.
5. The contents of the Proposal have not been communicated by the Proposer or its employees or agents to any person not an employee or legally authorized agent of the Proposer and will not be communicated to any such persons prior to Due Date of this solicitation.
6. If awarded a contract, the Proposer will provide to Sourcewell Participating Entities the equipment, products, and services in accordance with the terms, conditions, and scope of a resulting contract.
7. The Proposer possesses, or will possess before delivering any equipment, products, or services, all applicable licenses or certifications necessary to deliver such equipment, products, or services under any resulting contract.
8. The Proposer agrees to deliver equipment, products, and services through valid contracts, purchase orders, or means that are acceptable to Sourcewell Members. Unless otherwise agreed to, the Proposer must provide only new and first-quality products and related services to Sourcewell Members under an awarded Contract.
9. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
10. The Proposer understands that Sourcewell will reject RFP proposals that are marked "confidential" (or "nonpublic," etc.), either substantially or in their entirety. Under Minnesota Statutes Section 13.591, subdivision 4, all proposals are considered nonpublic data until the evaluation is complete and a Contract is awarded. At that point, proposals become public data. Minnesota Statutes Section 13.37 permits only certain narrowly defined data to be considered a "trade secret," and thus nonpublic data under Minnesota's Data Practices Act.
11. Proposer its employees, agents, and subcontractors are not:
 1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
 2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
 3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated

by the State of Minnesota; the United States federal government or the Canadian government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - D. Abraham Hunter, Executive Vice President, Computer Aid, Inc.

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the solicitation proposal.

Yes No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum_12_Staffing_Related_Services_Solutions_RFP_061324 Thu June 6 2024 02:31 PM	<input checked="" type="checkbox"/>	11
Addendum_11_Staffing_Related_Services_Solutions_RFP_061324 Tue June 4 2024 07:49 PM	<input checked="" type="checkbox"/>	2
Addendum_10_Staffing_Related_Services_Solutions_RFP_061324 Thu May 30 2024 02:00 PM	<input checked="" type="checkbox"/>	1
Addendum_9_Staffing_Related_Services_Solutions_RFP_061324 Wed May 29 2024 04:12 PM	<input checked="" type="checkbox"/>	1
Addendum_8_Staffing_Related_Services_Solutions_RFP_061324 Fri May 24 2024 02:56 PM	<input checked="" type="checkbox"/>	4
Addendum_7_Staffing_Related_Services_Solutions_RFP_061324 Mon May 20 2024 06:26 PM	<input checked="" type="checkbox"/>	10
Addendum_6_Staffing_Related_Services_Solutions_RFP_061324 Fri May 10 2024 03:25 PM	<input checked="" type="checkbox"/>	1
Addendum_5_Staffing_Related_Services_Solutions_RFP_061324 Wed May 8 2024 04:17 PM	<input checked="" type="checkbox"/>	5
Addendum_4_Staffing_Related_Services_Solutions_RFP_061324 Tue May 7 2024 02:33 PM	<input checked="" type="checkbox"/>	2
Addendum_3_Staffing_Related_Services_Solutions_RFP_061324 Thu May 2 2024 04:45 PM	<input checked="" type="checkbox"/>	4
Addendum_2_Staffing_Related_Services_Solutions_RFP_061324 Tue April 30 2024 04:26 PM	<input checked="" type="checkbox"/>	2
Addendum_1_Staffing_Related_Services_Solutions_RFP_061324 Mon April 29 2024 03:31 PM	<input checked="" type="checkbox"/>	3