

**MASTER AGREEMENT #102424****CATEGORY: Facility Assessment and Planning with Related Services****SUPPLIER: ALPHA Facilities Solutions, LLC**

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and ALPHA Facilities Solutions, LLC, 4085 Cibolo Canyons, Suite 200, San Antonio, TX 78261 (Supplier).

Sourcewell is a local government and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) offering a Cooperative Purchasing Program to eligible participating government entities.

Under this Master Agreement entered with Sourcewell, Supplier will provide Included Solutions to Participating Entities through Sourcewell's Cooperative Purchasing Program.

**Article 1:  
General Terms**

The General Terms in this Article 1 control the operation of this Master Agreement between Sourcewell and Supplier and apply to all transactions entered by Supplier and Participating Entities. Subsequent Articles to this Master Agreement control the rights and obligations directly between Sourcewell and Supplier (Article 2), and between Supplier and Participating Entity (Article 3), respectively. These Article 1 General Terms control over any conflicting terms. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.
- 4) **Supplier Access.** The Included Solutions offered under this Agreement may be made available to any Participating Entity. Supplier understands that a Participating Entity's use of this Agreement is at the Participating Entity's sole convenience. Supplier will educate its sales and service forces about Sourcewell eligibility requirements and required documentation. Supplier will be responsible for ensuring sales are with Participating Entities.

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on January 3, 2029, unless it is cancelled or extended as defined in this Agreement.
- a) **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
- b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #102424 to Participating Entities. In Scope solutions include:
- a) Facility and building condition assessment and auditing;
  - b) Energy, utility, and emissions assessment and planning;
  - c) Site, safety, and code inspections;
  - d) Space utilization and planning;
  - e) Geographic information system (GIS) services
  - f) Feasibility, sustainability, and lifecycle assessment;
  - g) Asset, capital, and deferred maintenance planning and asset classification;
  - h) Benchmarking services and quality assurance;
  - i) Project management and coordination with facility owners;
  - j) Contract management and financial monitoring; and
  - k) Budget development, and program management services.
- 8) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
- 9) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.
- 10) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.
- 11) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcewell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.
- 12) **Open Market.** Supplier's open market pricing process is included within its Proposal.

**13) Supplier Representations:**

- i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.
  - ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.
  - iii) **Supplier Warrants.** Supplier warrants that all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.
- 14) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the term of this Agreement.
- 15) **Debarment and Suspension.** 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 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 Agreement. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time during the term of this Agreement.
- 16) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement 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 Section, all references to "federal" should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier's Included Solutions with United States federal funds.
- i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements 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.

ii) **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 comply with all applicable Davis-Bacon Act provisions.

iii) **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, 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 Agreement. Supplier certifies that during the term of an award for all Agreements by Sourcwell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

iv) **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 Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

v) **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 Agreement it will comply with applicable requirements as referenced above.

vi) **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.

vii) **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).

viii) **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.

ix) **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.

x) **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.

- xi) **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 Agreement 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.
- xii) **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.
- xiii) **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.
- xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement 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 Agreement or any purchase by an authorized user.
- xv) **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 Agreement or any purchase by a Participating Entity.
- xvi) **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.
- xvii) **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related to the anticipated work under this Agreement 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.
- xviii) **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.

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

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

## **Article 2: Sourcewell and Supplier Obligations**

The Terms in this Article 2 relate specifically to Sourcewell and its administration of this Master Agreement with Supplier and Supplier's obligations thereunder.

- 1) **Authorized Sellers.** Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.
- 2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
  - Identify the applicable Sourcewell Agreement number;
  - Clearly specify the requested change;
  - Provide sufficient detail to justify the requested change;
  - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
  - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions 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 Agreement and will be incorporated by reference.

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:
  - Maintenance and management of this Agreement;
  - Timely response to all Sourcewell and Participating Entity inquiries; and
  - Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.

- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions 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;
- Sourcewell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

If collected by Supplier, the Report may include the following fields as available:

- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.

- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement 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.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.
- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement 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 design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.
- 18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and

maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.

**19) Grant of License.**

**a) During the term of this Agreement:**

i) **Supplier Promotion.** 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, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.

ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.

b) **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, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.

**c) Use; Quality Control.**

i) 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.

ii) 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. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.

d) **Termination.** Upon the termination of this Agreement 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.

**20) Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and Participating Entity to negotiate this term to within any transaction documents.

- 21) **Severability.** If any provision of this Agreement 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 Agreement is capable of being performed, it will not be affected by such determination or finding and must be fully performed.
- 22) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement 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:
- a) **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 Agreement.
    - \$1,500,000 each occurrence Bodily Injury and Property Damage
    - \$1,500,000 Personal and Advertising Injury
    - \$2,000,000 aggregate for products liability-completed operations
    - \$2,000,000 general aggregate
  - b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.
  - c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its 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 Agreement 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 Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

23) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

24) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

### **Article 3: Supplier Obligations to Participating Entities**

The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

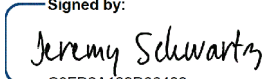
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.
- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.
- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.
- 5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier's

standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcwell account number.

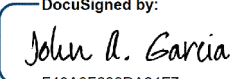
- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcwell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcwell

ALPHA Facilities Solutions LLC

Signed by:  
  
C0FD2A139D06489...

By: \_\_\_\_\_  
Jeremy Schwartz  
Title: Chief Procurement Officer  
Date: 1/3/2025 | 9:52 AM CST

DocuSigned by:  
  
F40A0F600DA84F7...

By: \_\_\_\_\_  
John A. Garcia  
Title: Chief Executive Officer  
Date: 1/3/2025 | 7:43 AM PST

# RFP 102424 - Facility Assessment and Planning

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## Vendor Details

Company Name: ALPHA Facilities Solutions  
4085 Cibolo Canyons Street, Suite 200  
Address: San Antonio, Texas 78261  
Contact: Kimberley Jones  
Email: kimberley.jones@alphafacilities.com  
Phone: 210-464-4630  
HST#: 26-0845867

## Submission Details

Created On: Thursday September 05, 2024 08:05:27  
Submitted On: Thursday October 24, 2024 08:37:21  
Submitted By: Rachael Reed  
Email: rachael.reed@alphafacilities.com  
Transaction #: 82b7fe08-605e-426e-8940-01fc528f15ab  
Submitter's IP Address: 98.25.106.187

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## Specifications

**Table 1: Proposer Identity & Authorized Representatives (Not Scored)**

**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).

Table 1 Specific Instructions. Sourcewell requires identification of all parties responsible for providing Solutions under a resulting master agreement(s) (Responsible Supplier). Proposers are strongly encouraged to include all potential Responsible Suppliers including any corporate affiliates, subsidiaries, D.B.A., and any other authorized entities within a singular proposal. All information required under this RFP must be included for each Responsible Supplier as instructed. Proposers with multiple Responsible Supplier options may choose to respond individually as distinct entities, however each response will be evaluated individually and only those proposals recommended for award may result in a master agreement award. Unawarded entities will not be permitted to later be added to an existing master agreement through operation of Proposer's corporate organization affiliation.

Line Item	Question	Response *	
1	Provide the legal name of the Proposer authorized to submit this Proposal.	ALPHA Facilities Solutions, LLC	*
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y - Yes	*
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	ALPHA Facilities Solutions, LLC	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	CAGE: 4UPR7 UEI: UAJ8SPTX9DL7	*
5	Provide your NAICS code applicable to Solutions proposed.	Management & Advisory: 541611, 541612, 541613, 541614, 541618, 541620, 541690, 541990 Technical & Engineering: 33661, 488190, 488999, 541330, 541330E1, 541330E2, 541330E3, 541360, 541370, 541380, 541690, 541990, 611512 Environmental: 541330, 541360, 541380, 541620, 541690, 541990, 561210, 562112, 56221, 562910, 562910E Facilities: 238160, 238210, 238220, 238290, 238320, 238990, 485999, 488190, 488490, 488999, 531312, 541331, 541611, 541614, 541690, 541990, 561210, 561621, 561710, 561720, 561990, 562111, 562112, 562211	
6	Proposer Physical Address:	4085 Cibolo Canyons, Suite 200, San Antonio, TX 78261	*
7	Proposer website address (or addresses):	www.alphafacilities.com https://alphafacilities.com/	*
8	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):	John A. Garcia Chief Executive Officer 4085 Cibolo Canyons, Ste 200 San Antonio, TX 78261 john.garcia@alphafacilities.com O: (210) 492-5742 ext. 201 M: (210) 240-7531  Kathleen I. Garcia Chief of Staff 4085 Cibolo Canyons, Ste 200 San Antonio, TX 78261 kgarcia@alphafacilities.com O: (210) 492-5742 ext. 202 M: (210) 601-3190	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	John A. Garcia Chief Executive Officer 4085 Cibolo Canyons, Ste 200 San Antonio, TX 78261 john.garcia@alphafacilities.com O: (210) 492-5742 ext. 201 M: (210) 240-7531	*

10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	<p>Kimberley Jones Chief Client Officer 4085 Cibolo Canyons, Ste 200 San Antonio, TX 78261 kimberley.jones@alphafacilities.com O: (210) 492-5742 ext. 205 M: (210) 464-4630</p> <p>Keith Jones Chief Practice Officer 4085 Cibolo Canyons, Ste 200 San Antonio, TX 78261 keith.jones@alphafacilities.com O: (210) 492-5742 ext. 215 M: (979) 229-4637</p>
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**Table 2A: Financial Viability and Marketplace Success (50 Points)**

Line Item	Question	Response *
11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	<p>Company History / Overview</p> <p>ALPHA Facilities Solutions, LLC (ALPHA) was founded in 2007 and encompasses a growing 100+ person team of leading experts in the profession of Asset Management of the built environment and workforce readiness. ALPHA is headquartered in San Antonio, Texas. ALPHA's team of talented professionals, the integration of technology solutions and our ability to harness the power of high-quality data sets us apart.</p> <p>ALPHA is a worldwide provider of capital, environmental planning software solutions for the built environment and workforce readiness management supported by a wide array of professional services including facility asset management; capital planning, facility condition assessment, environmental assessments and planning, maintenance management (including equipment inventory and PM schedule creation), energy audits, investment strategy, space planning, information technology assessments and planning, and workforce readiness services to federal/state/municipal, education, healthcare and commercial clients. In 2020 ALPHA formed ALPHA Prime Solutions, dba to consolidate and focus on our clients and market growing demand for our technology products and services.</p> <p>With extensive worldwide expertise, ALPHA has a successful documented track record for helping clients achieve their goals. As a direct result of ALPHA's work product, clients have realized coordinated benefits of millions of dollars in additional sustainment funding and over \$11 Billion in additional capital resources.</p> <p>Our business priorities are simple:  #1 Take care of our Clients (every client is embraced as client for life)  #2 Taking care of our People that take care of our Clients.  #3 Taking care of our organization.</p> <p>We are in business to serve the higher purpose of helping all built environment owners and operators to be better stewards of their people and built environment assets therein providing all those that experience them a safer and more functionally fit environment in which to live, work and play.</p> <p>We hold the truth of this purpose to be self-evident in all we do by creating a team with unwavering integrity and steadfast spirit and dedication to serve this purpose. So, we move forward each day with renewed spirit, aspiration and focus to build -  One business.  For all markets.  With the scales of success measuring value to the client, the people and organization serving the client.</p> <p>ALPHA's core values are embodied by DIICE, which represents Dedication, Innovation, Integrity, Commitment and Excellence. We encourage all of our team members to apply these core principles in their daily work efforts, decision making, and self-evaluation.</p> <p>From an industry longevity perspective, ALPHA has demonstrated sustained success because it is built on a strong foundation for long-term growth. There is no greater need than to provide a suite of services that directly addresses the needs of our country's aging infrastructure.</p>

12	What are your company's expectations in the event of an award?	<p>Our company goals and expectations are to provide a respected contract vehicle to our clients, who need our facility assessment and planning support services together with our software solutions to help them achieve their mission. The outcome of this will be growing our sales and Sourcewell sales.</p> <p>As we did in 2021, upon award, we will market the Sourcewell contract extensively and reach deeper into our existing client base of more than 8,000 entities and approximately 50 teaming partners to leverage access to our professional services that are supported by state-of-the-art capital and environmental planning software solutions. Our facility assessment, planning and related services are even more powerful when they are coupled with a software solution. To create an even larger bandwidth of sales opportunities, our asset management service offerings are often needed by our growing family of software partners.</p> <p>As part of our professional service offerings, we populate a respective software solution. This approach offers Sourcewell participating entities a comprehensive, turn-key solution and the success of this approach is proven by over \$5M in new Sourcewell sales.</p> <p>We have an expectation that ALPHA will be recognized as a vendor who offers a unique value add to Sourcewell participating entities because we bring together our services and software expertise to merge separately managed and budgeted realms of Capital Planning, Operations and Maintenance and other major programs such as environmental planning, bond planning, and energy planning by documenting holistic needs and accountable measures of success.</p> <p>Our expectation is that once any combination of coordinated capital planning, operations and maintenance needs are identified—such as roof replacements, architectural, mechanical, electrical and plumbing needs—our clients will turn to Sourcewell vendors to acquire construction services, flooring, fire and life safety services to implement their projects.</p> <p>For example, ALPHA's Asset Performance Planning Software (APPS) supports all aspects of capital planning for the built environment managed by federal, state, municipal, education, and healthcare facility managers. Once populated with key data elements about the building or asset's age, condition and last renewal, the data sets produced by APPS will assist managers prioritizing reinvestment requirements and communicating financial needs to their leadership and communities.</p> <p>Capital planning and computerized maintenance management systems (CMMS) software are often implemented within the same timeframe to take existing asset management programs to the next level of sophistication. The value and demand for our professional services to support our clients' and our software partners' preferred computerized maintenance management system (CMMS) software continues to grow by approximately 20% each year.</p> <p>Contract Management Best Practices include the following:</p> <ul style="list-style-type: none"> <li>a) Kick-Off Meeting – We will schedule a Kickoff meeting with Sourcewell stakeholders within two weeks of award or at the convenience of Sourcewell. At that time, we can schedule quarterly calls to discuss new opportunities with new participating entities and perhaps new contracts similar to the Sourcewell - IMCOM Intergovernmental Support Agreement (IGSA) put in place with U. S. Army in April of 2024. Quarterly calls will be beneficial to both Sourcewell and ALPHA.</li> <li>b) Performance Reviews – We will schedule and participate in a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information. Performance reviews will be beneficial to both Sourcewell and ALPHA.</li> <li>c) Sales Reporting – We will, as a material element to the Master Agreement, report all completed transactions with Participating Entities utilizing this Agreement.</li> <li>d) Quarterly Reporting – We will provide Sourcewell an activity report of all transactions completed utilizing this Agreement once each quarter. We understand reports are due at least once each calendar quarter.</li> </ul>
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13	<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. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.</p>	<p>From our founding in 2007 through 2019, our annual operating profit on net revenue averaged over 34%. While we experienced a decrease in 2020 to 13%, exceptional demonstration of our financial strength is well reflected by our resiliency because our average from 2021 through projected 2024 is ~25% operating profit on net revenue. *Compared to over 650 companies included in a 2023 annual industry report, our average 25% annual operating profit on net revenue for established classical professional architecture, engineering and environmental firms exceeded performance of peer E/A medium size (51-250 employees, 16%) and large firms (251+ employees, 15%).</p> <p>Our sustained performance, and resiliency, at these high levels of achievement speaks directly to our abilities to not only establish fiscal strength and stability but to deliver tremendous value and growth in the profession of Asset Management for the built and workforce readiness environments.</p> <p>To detail and demonstrate ALPHA's financial strength and stability, we submitted a letter of reference from our banking entity. It's our understanding that our submittal to this solicitation will be available to the public. Due to the confidential nature of our corporate financial statements, we are providing detailed reference letters addressing ALPHA's extraordinary fiscal responsibility and our ability to successfully market, contract and execute millions of dollars of work. Additionally, ALPHA successfully completed the rigorous audit conducted by the Defense Contract Audit Agency in September of 2020.</p> <p>In August of 2024, ALPHA was issued a Secret Facility Clearance by the Defense Counterintelligence and Security Agency (DCSA) to support the most security-sensitive contracts. DCSA is the largest security agency in the federal government dedicated to protecting America's trusted workforce and trusted workspaces. In order for ALPHA to be awarded a Secret Facility Clearance by DCSA, ALPHA's corporate structure, including key management personnel, was researched by DCSA and ALPHA was cleared for access to classified information.</p> <p>Since ALPHA was founded, we have successfully delivered over \$250M in contracts providing professional services, software and software support and service-related work products.</p>
14	<p>What is your US market share for the Solutions that you are proposing?</p>	<p>We estimate ALPHA's market share of the U.S. education, state/municipal, healthcare, hospitality, commercial, and federal asset management market is between 15-20%--and growing each year.</p> <p>ALPHA's overall market share will continue to grow exponentially with a successful follow-on Sourcewell contract. ALPHA has an extensive client base and proven track record for successfully marketing, contracting and executing asset management services. We specifically market "turnkey" service offerings coupled with capital, environmental planning and workforce readiness/management software solutions - totaling over \$250M.</p> <p>In 2024, the Global Computerized Maintenance Management System (CMMS) Software market size was valued at US\$ 960.88 million in 2023 and is expected to expand at a CAGR of 10.55% during the forecast period, reaching US\$ 1.753 Billion by 2032. This is shared because much of the CMMS market requires a capital planning technology solution. Our experience is that clients will invest in a CMMS first, and then after, or in conjunction with successful implementation, the next natural step is to purchase a capital planning software solution. Our CMMS implementation services (asset inventory and preventive maintenance (PM) schedules) are in high demand due to documented successes.</p> <p>From 2024 to 2031, the Capital Program Management Software market is poised to experience substantial growth, driven by a robust compound annual growth rate (CAGR) of 14.21% per Market Analysis Insights on LinkedIn. This significant expansion indicates a thriving market environment characterized by increasing demand and technological advancements. By 2031, the market is projected to reach a value of 17.54 billion, reflecting a remarkable increase from 7.9 billion in 2024.</p> <p>ALPHA is offering Sourcewell participating entities a comprehensive set of service offerings and solutions by bringing together professional services with software. The success of our business model is documented within this research.</p>

15	What is your Canadian market share for the Solutions that you are proposing?	<p>ALPHA is a global supplier of facility condition assessment, planning and related services. We successfully market, contract and execute projects in Canada and estimate ALPHA's market share of the Canadian and US market for education, state/municipal, healthcare, hospitality, commercial and federal asset management market is between 10-15%</p> <p>Marketing and sales efforts were slowed during the COVID-19 pandemic when Canada closed its borders on March 21,2020 through October 1, 2022.</p> <p>Beyond North America, ALPHA performs asset management services to include facility condition assessments, AHERA surveys, asset inventory and barcode tagging, and software implementations globally for the Department of Defense Education Activity e.g. Europe, Pacific and Americas and facilities located on US Army, Air Force, Marines and Navy installations.</p> <p>We follow CDC protocols, state, local and host nation guidelines to perform our services safely and responsibly. We successfully provided our asset management services throughout the pandemic.</p>
16	Disclose all current and completed bankruptcy proceedings for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcwell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	<p>Not applicable.</p> <p>ALPHA has no current, planned or completed bankruptcy proceedings to disclose within the past seven years or dating back to the founding of the company.</p>

17	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b).</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>Service Provider (b) Employee Based Sales – Our relationship with our sales and service force is multi-dimensional. Our employee-based sales force is our workforce. Our organization has a business development group supported by practice leaders who are in a continuous state of marketing and sales. Our technical teams traditionally work with our business development and practice leads and engage the client early in the sales process. Once our technical teams begin working directly with our clients, they are trained to engage in discussion as well as prospect for additional services the client may need to make their capital and environmental planning software implementation experience the most meaningful.</p> <p>Our organization is a highly focused, client facing group of professionals, who treat each interaction as an opportunity to help our clients do the best work of their lives.</p> <p>Our Business Development team researches and identifies both long and short-term leads. They are well versed on contracting options and how to assist clients identify need, guide and direct clients to appropriate contracting vehicles, and help with any technical scopes of work if necessary.</p> <p>We have five individuals responsible for maintaining current client base and growing their respective practices. Within each of the practice areas, there is another group of project managers known as "seller-doers" who also actively participate in sales engagements.</p> <p>The practice leaders and members of our business development team participate in local, national and international industry events. ALPHA actively conducts sponsored research and development with Tier 1 Higher Education and industry partners with multiple highly cited publications. We also submit white papers and abstracts for speaking events both personally and virtually since the beginning of the pandemic. Practice leaders are responsible for marketing and selling the capital and environmental planning software solutions and the professional services needed to populate the software, in addition to making the software a turn-key solution. The practice leads coordinate their efforts across the defined geographic regions e.g. OCONUS Europe, Pacific/CONUS, Northeast, Southeast, Northern Central, Southern Central, Northwest and Southwest.</p> <ol style="list-style-type: none"> <li>1. Asset Management</li> <li>2. Environmental Planning</li> <li>4. Energy</li> <li>5. Information Technology</li> <li>6. Workforce Readiness</li> </ol> <p>Teaming Partnerships – In addition to ALPHA Employee Based sales, ALPHA has established a long list of teaming relationships with software, architectural, engineering, and environmental firms who desire capital and environmental software planning solutions. We have co-developed training material and a process for co-marketing and selling efforts to assist facility owners and managers with meaningful, cost-effective solutions.</p> <p>Each of our teaming partners have a sales team who are grouped by market and geographic territory. We align the ALPHA employee-based sales team with our teaming partner's sales teams to market and win work with clients across all markets</p> <p>Collectively, our teaming partner resources are strategically aligned to create robust experiences that enable ALPHA to manage and staff multiple projects concurrently to service our clients every need.</p>
18	<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>ALPHA Facilities Solutions is an architectural/engineering firm. As part of our software and service offerings, we hold several licenses and certifications to support our work products. These credentials are maintained, acquired and kept current in support of the business contemplated by this RFP. Our employees maintain ongoing continuing education to maintain individual licenses.</p> <p>ALPHA is a member of industry leading trade groups such as Texas Association of School Business Officials, National Council of School Facilities, Society of American Military Engineers, International Facility Management Association, and The American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE). Additionally, ALPHA is a Texas licensed Professional Engineering Firm, Texas licensed Asbestos Consulting firm, and our team also holds various environmental certificates for Asbestos Building Inspector, Asbestos Management Planner, Asbestos Project Design, and Contractor Supervision, Asbestos Air Monitoring, Lead Based Paint Building Inspector, Lead Based Paint Risk Assessor, EPA Renovator, HAZWOPER, HAZWOPER Supervisor, COVID-19 Design and Planning, COVID-19 Clean and Disinfect, Indoor Air Quality, OSHA Safety certifications.</p> <p>*Uploaded are a few licenses and certifications held by ALPHA.</p>

19	Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.	Not applicable. ALPHA has no current and past debarments or suspensions within the past seven years or dating back to the founding of the company.	*																				
20	Describe any relevant industry awards or recognition that your company has received in the past five years.	ALPHA has been recognized as a recipient of the following awards over the past five years: SBA Minority Enterprise Development Award - 2021 San Antonio Business Journal Fast Track Award – 2019 Texas A&M University Aggie 100 – 2019	*																				
21	What percentage of your sales are to the governmental sector in the past three years?	60%	*																				
22	What percentage of your sales are to the education sector in the past three years?	40%	*																				
23	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	<p>Based on our recent, relevant experience, we continue to anticipate that a significant portion of the projected GSA contract work will be redirected to Sourcewell as we continue to market the Sourcewell contract to past and future State, Education and Federal clients.</p> <p>ALPHA contributes to much higher Sourcewell Sales than what is reflected. The combined sales efforts between our ALPHA employee sales team in partnership with Capital Planning and CMMS technology solution provider sales teams often result in Sourcewell sales but are contracted under our Partners' Sourcewell Contracts.</p> <p>In addition to ALPHA's direct sales of ~\$5M (2021-2024), ALPHA has directly contributed to an additional \$8.9M in estimated sales (2021–2024) supporting our Partner sales and marketing teams –totaling over \$14M in total sales over the past four years. This is a true sales synergistic impact benefiting the Sourcewell member community.</p> <p>1. Sourcewell Contract #020421-ALP annual sales volume for this agreement over the past three years.</p> <table><tr><td>2021</td><td>\$293,905</td></tr><tr><td>2022</td><td>\$596,712</td></tr><tr><td>2023</td><td>\$1,554,252</td></tr><tr><td>2024</td><td>Year to Date (October 18, 2024) – *\$603,347 (Anticipated \$2.6M for total 2024 sales)</td></tr></table> <p>*Please note an additional \$2M in awards between October 18 – December 31.</p> <p>2. U. S. Corps of Engineers, Mobile District, Alabama Contract No: W91278-19-D-0021</p> <table><tr><td>2021</td><td>– \$2,490,483</td></tr><tr><td>2022</td><td>– \$470,060</td></tr></table> <p>3. U. S. Corps of Engineers, Norfolk District (Multi-Year Contract - Department of Defense Education Activity – Indefinite Delivery Indefinite Quantity contract awarded September 2019 with maturity date of September 2024 - \$25M Total</p> <table><tr><td>2021:</td><td>\$4,094,488</td></tr><tr><td>2022:</td><td>\$4,298,791</td></tr><tr><td>2023:</td><td>\$4,439,500</td></tr><tr><td>2024 YTD</td><td>– \$4,625,251</td></tr></table>	2021	\$293,905	2022	\$596,712	2023	\$1,554,252	2024	Year to Date (October 18, 2024) – *\$603,347 (Anticipated \$2.6M for total 2024 sales)	2021	– \$2,490,483	2022	– \$470,060	2021:	\$4,094,488	2022:	\$4,298,791	2023:	\$4,439,500	2024 YTD	– \$4,625,251	*
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2023:	\$4,439,500																						
2024 YTD	– \$4,625,251																						

24	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?	<p>Based on our recent, relevant experience, we continue to anticipate that a significant portion of the projected GSA contract work will be redirected to Sourcwell as we continue to market the Sourcwell contract to past and future State, Education and Federal clients.</p> <p>1. GSA Multiple Award Schedule (MAS) Contract: 47QRAA20D000T (Awarded October 31, 2019)  2021: \$1,113,730  2022: \$898,197  2023: \$2,195,102  2024: \$2,346,138</p> <p>2. GSA OASIS Small Business, Pool 1 Contract No: 47QRAD20D1166 (Awarded May 26, 2020)  2021: \$986,115  2022: \$2,094,416  2023: \$6,480,788  2024 YTD: \$5,127,356</p> <p>3. GSA OASIS+ Service-Disabled Veteran Owned (SDVOSB) Contract No. 47QRCA24DV012 (Awarded September 30, 2024)</p> <p>4. GSA OASIS+ Small Business (Apparent Awardee) Contract No. TBD (Award anticipated December 2024)</p>	*
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### Table 2B: References/Testimonials

**Line Item 25.** Supply reference information from three customers who are eligible to be Sourcwell participating entities.

Entity Name *	Contact Name *	Phone Number *	
Joint Base Myer-Henderson Hall	Darius R. Pratt, Directorate of Public Works - Chief, BOI Division	(703) 696-6411 Office (703) 994-7701 Mobile	*
Charleston County School District	Darrel Hartman, Programming Officer – Facilities Management	(843) 566-7781	*
Department of Defense Education Activity	Ron Arnold, DoDEA HQ Program Manager	(571) 372-1346	*
City of Waco	Thomas Yourman, Senior Facilities Project Manager, Facilities	(254) 750-8433	

### Table 3: Ability to Sell and Deliver Solutions (150 Points)

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>Sales force – Practice areas:</p> <ol style="list-style-type: none"> <li>1. Asset Management: San Antonio, TX; Nashville, TN, Poulsbo, WA and various locations in Alabama, Florida, Illinois, Michigan, North Carolina, South Carolina, Tennessee and Wisconsin.</li> <li>2. Environmental Planning: San Antonio, TX; Pittsburgh, PA</li> <li>3. Energy Management: San Antonio, TX; Atlanta, GA</li> <li>4. Information Technology: San Antonio, TX; Pittsburgh, PA; Poulsbo, WA</li> <li>5. Workforce Readiness: San Antonio, TX; Poulsbo, WA</li> </ol> <p>The locations of our sales network (sales force) and service force are summarized below:</p> <ol style="list-style-type: none"> <li>1. San Antonio, TX</li> <li>2. Pittsburgh, PA</li> <li>3. College Station, TX</li> <li>4. Huntsville, AL</li> <li>5. Madison, AL</li> <li>6. Amelia Island, FL</li> <li>7. Jacksonville, FL</li> <li>8. N. Reddington Beach, FL</li> <li>9. Riverview, FL</li> <li>10. Tampa, FL</li> </ol>	

11. Atlanta, GA
12. Evans, GA
13. Fortson, GA
14. Scott AFB, IL
15. Lansing, MI
16. Raleigh, NC
17. Charleston, SC
18. Columbia, SC
19. Nashville, TN
20. Crossville, TN
21. White House, TN
22. College Station, TX
23. Houston, TX
24. Waco, TX
25. Orem, UT
26. Charlottesville, VA
27. Chesterfield, VA
28. Bremerton, WA
29. Lacey, WA
30. Seattle, WA

Outlined below please find a summary of our sectors and sales personnel supporting our capital and environmental planning software solutions. \*

**Asset Management:**

Number of Workers - 15

ALPHA Employees - 15

Third Party Employees - 50

Overlap between Sales and Service - None

**Environmental Planning:**

Number of Workers - 12

ALPHA Employees - 12

Third Party Employees - 20

Overlap between Sales and Service - None

**Energy Management:**

Number of Workers - 12

ALPHA Employees - 12

Third Party Employees - 30

Overlap between Sales and Service - None

**Information Technology:**

Number of Workers - 15

ALPHA Employees - 15

Third Party Employees - 20

Overlap between Sales and Service - None

**Workforce Readiness:**

Number of Workers - 10

ALPHA Employees - 10

Third Party Employees - 5

Overlap between Sales and Service - None

Teaming Partnerships - In addition to ALPHA Employee Based sales, ALPHA has established a long list of teaming relationships with software, architectural, engineering, and environmental firms who desire high functioning CMMS, capital planning, environmental planning, and workforce readiness software solutions. We have co-developed training material and a process for co-marketing and selling efforts to assist facility owners and managers with meaningful, cost-effective solutions.

Each of our growing number of teaming partners has a sales team who are grouped by market and geographic territory. We align the ALPHA employee-based sales team with our teaming partner's sales team to market and win work with clients across all markets.

27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	<p>ALPHA does not have a network of Authorized Sellers who deliver solutions. ALPHA services are performed by ALPHA employees. ALPHA's team of 100+full-time employees are trained to deliver and provide all client solutions and services.</p> <p>Since the original Sourcewell contract award in 2021, ALPHA's teaming relationships serve as powerful sales and marketing network to attract new and retain existing clients. ALPHA has grown its long list of strategic teaming partnerships with software, architectural, engineering, and environmental firms who desire high functioning CMMS, capital and environmental software planning, and workforce readiness solutions.</p> <p>We have co-developed training material and a process for co-marketing and selling efforts to assist facility owners and managers with meaningful, cost-effective solutions. This sales and marketing network is comprised of architectural, engineering, environmental planning, aviation and facility maintenance management, and research and development companies who have a global client base. These firms reach back to ALPHA's core business offerings to specifically access our asset management expertise as well as meet their service-disabled veteran owned business goals.</p> <p>Our teaming relationships will continue to reference the Sourcewell contract as a viable, convenient contracting vehicle to their client base. Again, leveraging the power of large, global companies strengthening their ability to market and sell services ALPHA provides through Sourcewell.</p>	*
28	Service force.	<p>We have over 100 professionals that have dedicated their career to asset management. Our service force is our workforce that is comprised of architects, engineers, construction professionals, environmental experts, data scientists, commissioning, cost estimating, program/project management, financial management, landscape architects, water resource management, energy management, and IT/programming specialists.</p> <p>Our team is highly trained, licensed and credentialed. They are located all over the country, as identified in response 26, and geographically dispersed for rapid deployment.</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 ordering process is designed to be as easy as possible for our clients. Clients typically reach out via a phone call or email and inquire about our proposed services through the Sourcewell contract. ALPHA will evaluate the client's needs, ensure they are aligned with the service offering advertised via our Sourcewell contract, confirm the client's membership and provide a proposal for the services based off the posted pricing models. If the client's request is unique, a similar process takes place except for providing a custom proposal based off the client's specific needs.</p> <p>All client contracts clearly identify the sale as a Sourcewell Contract sale so that our accounting department immediately begins tracking the project and reporting quarterly sales and making prompt payments to Sourcewell.</p>	*
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>Our number one business priority is to "Take care of our Clients" and every client is embraced as a client for life. Our team represents a collection of qualified professionals who have dedicated their careers to developing capital and environmental planning software solutions and providing the necessary services to maximize their value to client organizations.</p> <p>Our core values translate into a firm who is highly sought after for small, medium and complex, large-scale, geographically dispersed projects. Our firm and our people who are focused on customer service every day are known for being professional, friendly, responsive, and fantastic communicators.</p> <p>We enjoy interacting with our clients on a frequent basis to confirm the project is on track. We are conscientious and situationally aware of the need to verify that our customers are happy with our progress. We want to be available and responsible to address any unanticipated concerns that may arise so we can make any mid-course refinements.</p> <p>Our customer service approach is embedded in our culture and how we interact with each of our clients. Outlined below are the pillars of our success:</p> <p>1. Communication and Responsiveness – We focus on customer satisfaction by assigning the appropriate asset management, environmental expertise, and software engineers to all our asset management service offerings. Our communication methods are established based on client preference during the project kick off and follow suit for the duration of the project. Should anything arise that needs to be addressed outside of the established communication schedule, we will reach out directly to the client in a timely fashion and request the client do the same, should a need arise.</p> <p>We hold monthly in-progress review meetings with our clients to review scope of work activities, project milestones, on and off-site execution schedules, status of deliverables and overall client satisfaction.</p>	

		<p>We also prepare detailed project status reports monthly. The project status reports are submitted to our clients with their monthly invoice. This process provides for a transparent review of how the overall project is performing and ALPHA's fiscal responsibility and accountability of billing for the services performed on a percent complete basis.</p> <p>This approach builds tremendous trust and assures the client that they are valued and respected. ALPHA clients are happy clients, and happy clients pay their invoices on time and serve as exceptional references to others needing ALPHA services.</p> <p>Our software solutions support is highly responsive, and we have a help desk staffed Monday through Friday, during business hours 8:30 - 5:30 p.m. CDT. Specialists receive customer inquiries through email, customized web portals, and widgets embedded in our software. They then prioritize these inquiries as Tier 1/2/3 support issues. Specialists provide detailed responses to Tier 1 issues within 24 hours.</p> <p>Support Specialists coordinate with implementation specialists on Tier 2 issues, as those are typically configuration issues. The result is a thorough response to the customer within 72 hours. A team of software developers focuses on addressing Tier 3 customer issues ("Bugs"), with help from Domain Experts. Through close coordination with the Product Manager, Tier 3 issues are prioritized to the top of the Product Backlog. The result is inclusion into the next bi-weekly release after thorough review and testing for quality control. Throughout the support process, the customer is provided email updates, as each workflow step is completed. The customer also has access to thorough knowledge bases through our web portals.</p> <p>These knowledge bases are routinely updated by our Support Specialists.</p> <p>2. Quality Management – We focus on ensuring the quality assurance and quality control processes are properly staffed and Quality Assurance and Quality Control practices and policies are applied throughout each and every contract. All our deliverables go through a peer-review process, and quality assurance/quality control checks are used to ensure a high level of quality for our work products.</p> <p>As part of our standard software development process, all our products are run through an intense testing process to include code reviews, unit testing, and integration testing. Test/use cases are also written against client requirements to ensure software meets client needs. We also use a strict source control process to manage our source code which includes check-in/checkout processes and change comments.</p> <p>3. Tailored Contract Execution – We focus on ensuring a flexible, organizational execution plan is applied throughout each contract. This plan is in a continuous state of improvement and refinement, so each contract benefits from best in class, software solutions and service industry practices.</p> <p>4. Scope, Schedule and Budget – We focus on building project management plans, schedules, and budgets that please our customers. We apply established procedures and management tools that effectively address software solution implementations and technical support; project staffing needs; schedules and the quality of the contract deliverables. We have never failed to negotiate a contract with a client who wanted to hire us.</p> <p>As part of our requirements gathering process for software development, we meet with the clients to discuss their requirements. We then create requirements documentation and develop wire diagrams to show application process flow. This ensures we fully understand client requirements with documentation and the ability to walk through the application with interactive wire diagrams. Utilizing wire diagrams allows us to make minor changes real time for any requirements that may have been misunderstood.</p> <p>5. Personnel Planning – We focus on having an in-depth understanding of the scope of work and assigning highly qualified, experienced individuals with recent, relevant experience from our bench of professionals.</p>	
31	Describe your process for data collection, review, and analysis.	<p>ALPHA uses state of the art, ALPHA developed data collection software which is rooted to known industry standards like RS Means, International Facility Management Association (IFMA), International Organization for Standardization (ISO) 55000, Association of Physical Plant Administrators (APPA), American Public Works Association (APWA), American Society for Testing and Materials (ASTM), American Society of Heating, Refrigerating, and Air Conditioning Engineers (ASHRAE) and others to ensure the correct and appropriate data standardizations based on the specific industry markets or vertical we are performing services within. Data is typically rooted to a client site, to a specific building, to a room or space within the building and organized by classification and type e.g. HVAC_Air Handling Unit. Once collected, data is scrubbed through a rigorous quality control / quality assurance process, which includes photo and other documentation review by qualified senior architects and engineers.</p>	

32	Describe any forecasting of potential renovations, upgrades, or modifications	<p>All forecasting, upgrade, renovation or modification recommendations are calculated utilizing ALPHA developed modeling tools that apply strategic algorithms to analyze the combination of condition versus lifecycle data, as well as other key performance indicators (risk, life safety, mission dependency, etc.) to make recommendations based on the best return on investment for the end user.</p> <p>*Attached is a sample of the charts we provide to clients in the proposal process.</p>
33	Describe any cost analysis and budgeting tools you utilize and how the information is shared with stakeholders.	<p>Costs are initially derived by utilizing industry resource cost databases like RSMeans, BNI and others. Once baseline cost data has been analyzed and developed, we then work very closely with the client to understand what contingency, soft cost, regional cost factors also need to be applied to bring the rough order magnitude cost estimates in close alignment with their budgeting and the reality of doing business within specific areas/regions of the country/world.</p>
34	Describe your ability and willingness to provide your products and services to Sourcewell participating entities.	<p>ALPHA has a proven track record of providing our services and products to large, complex geographically dispersed projects and clients in the U.S. and internationally.</p> <p>As demonstrated since the time of the original Sourcewell contract award, we welcome the opportunity and freely offer our willingness to provide our services and products to Sourcewell participating entities in the U.S.</p> <p>For example, we routinely conduct facility condition assessments, AHERA surveys, asset inventories and tagging, populate CMMS, capital planning software and environmental planning and workforce readiness software for clients with small, medium and large portfolios. We coordinated with a CMMS technology solution provider to migrate asset data and preventive maintenance schedules for a client portfolio of 21 million square feet across ~ 100 U. S. locations.</p> <p>ALPHA has also served as program manager and coordinated with eight architectural/engineering firms to populate capital planning software for the West Virginia Department of Education for their entire portfolio of 43 million square feet of educational facilities. Using ALPHA's Asset Performance and Planning software, published 660 individual school reports and 62 county executive summaries.</p> <p>We were contracted by the Department of Defense Education Activity to populate capital planning software for all public schools sitting inside military installation fence lines. The portfolio of schools equated to approximately 14 million gross square feet of facilities. We deployed teams across 26 U.S. states (including Alaska and Hawaii) to collect the data needed to populate the software and generated 183 school reports across 70 different public school districts, and an overall executive summary within 8 months. The client provided us with Exceptional performance reviews.</p> <p>The result of this PSMI program resulted in the U.S. Department of Defense Office of Local Defense Community Cooperation (OLDCC) managing an Appropriations budget of \$3.25 Billion to invest in schools demonstrating serious capacity and condition needs.</p> <p>Our company is structured for high volume, geographically dispersed projects.</p>
35	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	<p>To date, we have successfully completed projects in British Columbia and Alberta. We welcome the opportunity and freely offer our willingness to provide our products and services to Sourcewell participating entities in Canada.</p> <p>Providing our services to international clients is an everyday event. ALPHA is currently under contract with the Department of Defense Education Activity where we are required to populate capital planning and environmental planning software for their schools across Europe, Japan, Korea, Guam and Okinawa. Our teams have passports, Contractor Access Cards (CACs) and are skilled at traveling internationally. For these projects we will be providing services for approximately 19 Million Gross Square Feet of educational and administrative facilities.</p> <p>Using ALPHA's Asset Performance and Planning software, we will publish over 90 individual school reports and Asbestos Management plans.</p> <p>Since the beginning of the COVID-19 pandemic, we immediately trained our staff on CDC approved protocols. Our team members follow all country/state/local COVID-19 travel restrictions, policies and procedures to keep our clients safe and our staff safe while performing our services.</p> <p>Our company is structured for high volume, geographically dispersed projects.</p>
36	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	<p>None. We are willing and capable of serving all geographical areas of the U.S. and Canada.</p>

37	Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.	None. We welcome the opportunity to provide full access to all our solutions to any participating entity of Sourcewell.	*
38	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	None. We do not have any specific requirements or restrictions.	*
39	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	<p>Yes. Our traditional milestone billing for the duration of the contract is substantially extended payment terms or options. For our larger projects, our professional services are billed monthly for the duration of the contract based on the percent of work completed throughout the month. During the project set up and kick off with the client, we walk through the billing cycles and invoice process to ensure a mutual understanding prior to beginning work on the project. Invoices are generally sent at the beginning of the month and if discussed in advance, we can adjust workflow to accommodate project needs and billing cycles.</p> <p>In the event a non-profit client requires extended terms, leasing or financing options, ALPHA is open to learning more about the client's needs. The fee for our software subscription is billed annually.</p>	*

**Table 4: Marketing Plan (100 Points)**

Line Item	Question	Response *	
40	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>Throughout the year, our Asset Management Success Team actively engages in a 50-state outreach program promoting the benefits of asset management and technology solutions to the education, state and municipal communities. ALPHA engages in one-on-one knowledge sharing sessions, provides industry reference materials to all entities interested in building and/or strengthening their assessment management programs. These materials socialize and secure funding to purchase our services and/or join the Sourcewell community. Today, we are actively working leads, opportunities, and proposals for approximately 10,000 contacts.</p> <p>Upon notification of a Sourcewell contract award, we will continue our marketing blitz campaigns to all our existing clients, business development leads, and teaming partner sales organizations (approximately 20,000 entities). As demonstrated since award of the initial Sourcewell contract in 2021, our client base repeatedly seeks to reach us through the Sourcewell contract. We have a ready-made market through former and current marketing efforts. It will be mutually beneficial for ALPHA and the Sourcewell community to work together to make the Sourcewell contract vehicle available so that we can continue referring current and new clients to Sourcewell.</p> <p>We believe both our federal and non-federal clients will continue to benefit greatly from accessing our software solutions and services through Sourcewell. Our federal client base generates approximately \$16M annually and our non-federal clients approximately \$8M. Given our documented success in marketing and generating Sourcewell sales, our projected sales are forecasted to grow by 30% in Year One of the new Sourcewell contract and by 50% in Year Two, with sustained growth for the remainder of the contract.</p> <p>We are making an exclusive commitment to Sourcewell to continue to market this contract to all our clients and business development leads.</p> <p>In all communications with our existing and potential clients, we market available contract vehicles to them so that they can make informed choices as to which acquisition strategy will work best within their organizations. Starting with our website and flash communications to our client base, we will advertise the Sourcewell contract - <a href="https://alphafacilities.com/contract-vehicles/">https://alphafacilities.com/contract-vehicles/</a>. All our proposals, marketing materials, speaking engagements, and correspondence with clients will continue to feature the Sourcewell contract vehicle.</p> <p>*Attached is a sample of our K12 handout that we feature to promote ALPHA services and Sourcewell.</p> <p>Most importantly, our project report deliverables will feature the benefits of reaching out to Sourcewell to leverage the Sourcewell vendors as they confirm and plan for projects identified within our capital and environmental planning service activities. We engage our clients in contract vehicle discussions early in our sales process. Marketing Sourcewell will continue to be our primary contract vehicle to market due to its brand recognition and ease of use.</p>	*

41	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>Understanding which areas of our website generate high traffic is vital to improving our visibility. Our team of developers and designers give us the ability to make modifications to our website quickly therein creating excellent agility within our digital marketing campaigns. We feature the Sourcewell contract on our website and detail how to quickly acquire software technology solutions along with ALPHA's asset management services.</p> <p>While our client base has historically not emanated from traditional social media marketing efforts due to the consultative nature of our sales and marketing efforts, we continue to make concerted efforts to further ALPHA's reach, brand recognition and service offering portfolio on social media platforms. With the rise in engagement, connectivity, and communication through social media channels between federal, state, municipal, private entities, and those that they serve, we truly understand the value in developing these platforms and having a skilled, experienced team within our workforce dedicated to these efforts. The variety of capture mechanisms and editing tools now available within mobile apps allows us a dynamic approach to demonstrating the capabilities of our service offerings and the dedication with which we serve our clients. We are confident our growth on these platforms will increase exposure and generate leads where they did not exist before.</p> <p>As a part of our sales and marketing plan, we also offer webinars to both current and potential clients. Our direct experience with myriad client scenarios has refined our ability to highlight best practices across all service offerings and our goal is unwavering in providing the resources, knowledge, training, and expertise that our clients need to be successful in achieving their goals. With access to data and experience from hundreds of organizations, we continue to serve our clients at the highest possible level.</p> <p>Further, webinar sessions are specifically geared towards building our team's credibility with the client's organization and demonstrating immediate cost savings opportunities. With our deep industry knowledge, connected suite of services, unmatched predictive insights, and unwavering commitment, we are positioned to help clients take control of their operations, move forward, and excel. We always view each client as a client for life and are invested in ensuring programs are successful and goals are met and/or surpassed.</p> <p>We are in a continuous state of refining and improving both traditional and more modern digital marketing efforts. Our exceptional performance ratings for product/project management underscore our approach to sales and marketing and the passion with which we engage our clients and partners. We are actively engaged with the LinkedIn community and continue to take advantage of metadata usage and search engine optimization tools such as YOASt. Google Analytics also continues to be an invaluable tool for us in tracking visitors to our website and monitoring usage patterns.</p>
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42	In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?	<p>We continue to view this contract vehicle as a long-term strategic partnership and have first-hand experience receiving the value associated with Sourcewell listing ALPHA's name and credentials as a vendor on the Sourcewell website and database. In turn, we engage in ongoing marketing initiatives with all our existing clients and all business development leads. Our client base repeatedly accesses ALPHA service offerings through the Sourcewell contract, and we have over 100 active proposals with an estimated value of \$9M currently being evaluated by potential new and existing clients. We have a ready-made market through former and current marketing efforts.</p> <p>An extraordinary example of Sourcewell's role in promoting agreements is the partnership Sourcewell built with the U. S. Army Installation Command (IMCOM). This partnership resulted in a highly celebrated Intergovernmental Service Agreement (IGSA) signed in September 2023 with a ceremonial signing in April 2024. ALPHA's core business supports both federal and non-federal asset management, facility assessment and planning markets. Sourcewell's successful initiative enables ALPHA to actively market the Sourcewell contract to our current U. S. Army clients—both at headquarters and installation levels. ALPHA currently markets services funded from U. S. Army Operations and Maintenance budgets.</p> <p>Our teaming relationships will continue to serve as a force multiplier for marketing ALPHA services and the Sourcewell contract vehicle—with anticipated growth from the IMCOM IGSA. This network is comprised of architectural, engineering, environmental planning, aviation and facility maintenance management and research and development companies who have a global client base. We will continue referring current and new clients to Sourcewell.</p> <p>We believe both our federal and non-federal clients will benefit greatly from accessing our software solutions and services through Sourcewell. Our federal client base generates approximately \$16M annually and our non-federal clients is approximately \$8M. Our sales projects are forecast to grow by 30% in Year One of the Sourcewell contract and by 50% in Year Two, with sustained growth for the remainder of the contract.</p> <p>In all communications with our existing and potential clients, we market available contract vehicles to them so that they can make informed choices as to which acquisition strategy will work best within their organizations. Starting with our website and flash communications to our client base, we will advertise the Sourcewell contract. All our proposals, marketing materials, speaking engagements, and correspondence with clients will continue to feature the Sourcewell contract vehicle.</p> <p>Most importantly, our project report deliverables will feature the benefits of reaching out to Sourcewell to leverage the Sourcewell vendors as they confirm and plan for projects identified within our capital and environmental planning service activities. We engage our clients in contract vehicle discussions early in our sales process. Marketing Sourcewell will continue to be our primary contract vehicle to market due to its brand recognition and ease of use.</p>	*
43	Are your Solutions available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.	Currently, we accept credit card payments. ALPHA services and software solutions are available via the GSA eBuy system associated with our GSA Schedule / MAS contract. Independent of the GSA e-procurement system, ALPHA continues to research alternative e-procurement systems that will meet the requirements of our clients and our service offerings. To date, our direct, relevant experience is with the GSA eBuy system.	*

Table 5A: Value-Added Attributes (100 Points)

Line Item	Question	Response *	
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44	<p>Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.</p>	<p>The following training programs are offered to participating entities as an optional fee. Training is currently being offered virtually. On-site training is available upon request.</p> <p>Asset Performance Planning Software Training Programs</p> <ol style="list-style-type: none"> <li>1. Executive (4 hours): Training for users who want access to reports and be able to monitor the current condition of the assets but will have no responsibility for the day-to-day manipulation of the data. Executive training will provide for these users. This training includes an explanation of the data elements.</li> <li>2. User (2 hours): User training is the training on how to use and operate the software to perform most data entry tasks.</li> <li>3. Advanced User (2 hours): Advanced users need more in-depth knowledge about the data in the application, so they must first attend the Executive training. The Advanced users can do the data entry for any task in the application and includes details such as pricing that is not available to most users. This group of users will be come your condition assessment experts.</li> <li>4. Administration (2 hours): Administration training is the training necessary to setup users and passwords, change pull-down menus, change the fiscal year, and publish data to the dashboard (the executive view). This group of users is typically small and controls the most important data that influences all the buildings in the system. Because of this, they must have the Executive and Advanced User training, and it is recommended that they take the User training as well.</li> <li>5. Analytics (1 day): Students will learn how to check the data for quality inputs. They will also learn how all the data is calculated. This class is usually targeted for senior employees.</li> </ol> <p>MPPPrimeTM Environmental Planning Software Training Program</p> <ol style="list-style-type: none"> <li>1. Environmental Planning (4 hours) - MPPPrimeTM training will provide users with the knowledge needed to create and edit users, enter data into the application at all levels, and produce reports. The training will be comprehensive for both admin users and data entry users. Admin users will learn how to create users and upload their appropriate certificates as well as update users to update passwords and certificates. Data entry users will learn how to create new buildings, rooms, materials, and samples. Data entry users will also learn how to set appropriate action steps based on material type as well other environmental factors that may affect the materials. This training will also include reports, their purpose and the data contained in the reports.</li> </ol> <p>Readiness Insight Training Program</p> <p>Workforce readiness management enables an organization to inventory the talent and expertise of the workforce and reconcile it against the needs of the organization and support mission readiness. Goals can be set to address specific skill needs and then compared against actual staffing to identify gaps. It also provides greater visibility into real-time readiness of selected personnel and/or capabilities. Having the ability to plan to know where talent and expertise will be needed can serve as the foundation for establishing mission critical training and educational programs that can be certified and offer growth potential to motivate the workforce.</p> <ol style="list-style-type: none"> <li>1. Executive (4 hours): Training for users who want access to analytics and reports to track status of all training users. This level of user has no responsibility for the day-to-day manipulation of the data.</li> <li>2. User (2 hours): User training is the training on how to use and operate the software to track, organize, and coordinate required training and training tracks.</li> <li>3. Administration (2 hours): Administration training is the training necessary to setup users and passwords, change pull-down menus, and implement training and training track requirements developed by users. This group of users is typically small and controls the most important aspect of the system for controlling training requirements. Because of this, they must have the Executive training, and it is recommended that they take the User training as well.</li> </ol> <p>Benefits include:</p> <ul style="list-style-type: none"> <li>• Critical Skills Management: Inventory and reconcile the talent and expertise of the workforce against the needs of your organization to support mission readiness.</li> <li>• Connecting the Enterprise: Realizing the benefits of a centralized database to automate, track and manage all of the workforce readiness processes all from within a single web-based application.</li> <li>• Managing Training: Managing and tracking personnel training can be a time consuming and overwhelming. Ensuring your workforce training credentials are accurate is important when assessing the next mission's needs and knowing who on your team has the necessary skills for execution.</li> <li>• Tracking Certifications: As new members of your workforce arrive, tracking and maintaining their training, experience and qualifications is critical in establishing their baseline.</li> </ul>
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45	<p>Describe any technological advances that your proposed Solutions offer.</p>	<p>A distinctive technological advance relates to the synergistic relationship between the capital and environmental planning software solutions and our services.</p> <p>Using the combination of APPS, MPPrimeTM, and our asset management services, a comprehensive and defensible Capital Asset Management Plan can be generated that considers the following factors:</p> <ul style="list-style-type: none"><li>a. Asset Condition</li><li>b. ADA Deficiencies</li><li>c. Energy Consumption</li><li>d. Asbestos Management</li><li>e. Asset Importance Asset Age</li><li>f. Asset Obsolescence</li><li>g. Desired Asset Condition</li><li>h. Existing Plans</li><li>i. Budget, which can be either fixed or calculated to meet multiple Key Performance Indicators</li></ul> <p>The Capital Asset Management Plan provides the information on what work needs to be done, on which building, in what year to meet the desired condition. This approach has successfully delivered over \$11B in funding for facility repairs, renovations and replacements for ALPHA clients.</p> <p>Our professional services are supported by state-of-the-art technology. Our teams are comprised of architects, engineers, environmental scientists, construction professionals, IT professionals, energy professionals and data scientists employ technology to maximize efficiencies e.g. cloud based electronic data acquisition, data management, barcode scanning, optical character recognition (OCR), BLK 360 devices for 3-D modeling, drones, Bluebeam/CAD services, scanning and digitizing, locating assets on drawings.</p> <p>ALPHA drives state-of-the-art technology solutions into every aspect of our asset management service offerings.</p>
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46	Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.	<p>ALPHA personnel hold state Professional Engineer (PE) licenses as well as AEE Certified Energy Manager (CEM), AEE Certified Energy Auditor (CEA), ASHRAE Building Energy Modeling Professional (BEMP) and/or ASHRAE Building Energy Assessment Professional (BEAP) certifications to support our energy practice and green initiatives.</p> <p>Pre-Design, Design and Construction Green Initiatives - ALPHA Related "Green" Initiatives - As a leader in the Asset Management industry, ALPHA applied our own recommended best practices when constructing a new three-story office building offering approximately 30,000 gross square feet of commercial space. Throughout the pre-design, design and construction processes, many green initiatives, EnergyStar and WaterSense labeled components were considered and implemented. In the Summer of 2020, ALPHA completed construction of the new building and moved their Headquarters office into the brand-new office space.</p> <p>In the Pre-Design phase, ALPHA led the development of lifecycle performance specifications and metrics for building envelope, HVAC and lighting systems and plumbing fixtures. In the role of Owner and Program Manager, ALPHA's role continued by monitoring contracted design and construction professional's implementation to the adherence to the lifecycle specifications in each of their areas of applicable professional and trade responsibilities.</p> <p>With a 2.5-3% first built cost premium to achieve this lifecycle cost approach to the design and construction process, overall, compared to typical design and construction specifications for this facility type there will be a 20+% savings in lifecycle costs. Systems and processes are in place to monitor, measure and maintain the desired lifecycle cost performance. The main integrated designed systems contributing to these savings are insulation (including glazing specs, external direct sun shading) and HVAC. All exterior windows also have glazing on the windows and sun shading to conserve energy. Lighting was also a consideration – All of the installed lighting fixtures are LED lights, and motion sensors were installed to conserve energy when not in use.</p> <p>Building Energy Modeling - A whole building energy model was used in support of designing the building. ALPHA identified Variable Refrigerant Flow HVAC systems as the most energy-efficiency option and ascertained that the window glazing choices were energetically of benefit.</p> <p>ALPHA is considering sub-metering to track energy performance beyond HVAC equipment. We regularly and manually add monthly Interval Data Recorder (IDR) data from CPS Energy to our SkySpark database. IDR data is 15 min interval data of demand [kW] and usage [kWh]. All this data is used to evaluate energy/emissions performance. ALPHA is registered on EnergyStar® Portfolio Manager® and meets the requirements for EnergyStar certification.</p> <p>ALPHA specializes in the assessment of building energy use, identification of pathways to reduce such, and quantification of the technical and financial performance of implementation of such pathways. It deploys Department of Energy software to that end, i.e. OpenStudio/EnergyPlus for technical performance, coupled with Microsoft Excel for financial performance.</p> <p>Landscaping Green Initiatives - Outside our headquarters building, the landscaping is a xeriscape design and arranged to capitalize on the tree placement for maximum shade on the building to conserve energy during the hot summers in Texas, as well as the installation of an irrigation system that is best in class technology and has earned the Watersense label.</p> <p>Energy Management Green Initiatives - ALPHA's Energy Management Services practice actively support PACE and LEED projects through whole building energy modeling based either on existing conditions identified through site visits, staff interview and document review or on various versions of ASHRAE 90.1. The practice is also leading ALPHA's efforts for whole building monitoring at their headquarters building in San Antonio, with the goal of maximizing energy performance and minimizing unexpected downtime. This is being implemented using BACnet servers and SkySpark database and visualization software.</p> <p>Water-Related Green Initiatives - Water Refill Stations - Some simpler fixture examples included on each floor, is a water bottle refill station installed to promote the conservation of water and use of reusable water bottles. To date, ALPHA employees have avoided using over 58,000 plastic bottles of water. ALPHA also provides reusable water bottles to employees and provides recycling bins for onsite recycling.</p> <p>Environmental Service Green Initiatives - ALPHA routinely conducts laboratory analyses for environmental waste characterization. This service provides our clients the ability to reduce the amount of investigation-derived waste and construction debris generated during construction activities that must be disposed as hazardous waste.</p>
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47	Identify any third-party issued eco-labels, ratings or certifications that your company has received for the Solutions included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	<p>Texas Property Assessed Clean Energy (PACE) Program - ALPHA's energy related services support our clients' energy efficiency and conservation initiatives. For example, we work with Texas-based clients working toward meeting the requirements necessary to receive PACE financing.</p> <p>The PACE Program is a simple and affordable way to finance energy and water efficiency upgrades for commercial properties. PACE provides low cost, long-term, 100% financing for these qualified "Green" improvements. Eligible upgrades are financed over time through a voluntary property tax assessment attached to the property. PACE improvements add value to the property and reduce utility bills with the upgrades typically paying for themselves with positive cash flow over time.</p> <p>Lone Star PACE provides energy efficiency, renewable energy and water conservation improvements to existing properties while generating tangible benefits to property owners, local governments, contractors and the community. PACE financing requires lender consent for any existing mortgage and the assessment is attached to the property. This provides flexibility as the assessment can either be paid off or assumed by the new owner in the event of a property sale.</p> <p>Our well credentialed staff are in position to help clients attain eco-labels, ratings or certifications related to LEED through our service offerings.</p> <p>ALPHA Facilities Solutions is an architectural/engineering firm. As part of our service offerings and software, we hold several licenses and certifications to support our work products. These credentials are maintained, acquired and kept current in support of the business contemplated by this RFP.</p> <p>ALPHA is a member of industry leading trade groups such Texas Association of School Business Officials, Society of American Military Engineers, and International Facility Management Association. Additionally, ALPHA is a Texas licensed Professional Engineering Firm, Texas licensed Asbestos Consulting firm, and our team also holds various environmental certificates for LEED, Certified Energy Management professional, Asbestos Building Inspector, Asbestos Management Planner, Asbestos Project Design, and Contractor Supervision, Asbestos Air Monitoring, Lead Based Paint Building Inspector, Lead Based Paint Risk Assessor, EPA Renovator, HAZWOPER, HAZWOPER Supervisor, COVID-19 Design and Planning.</p>
48	Describe approaches used by your company to align recommendations with an owner's sustainability goals.	<p>At the conclusion of a facility and/or building assessment, we review the facility renewal forecast schedule with the owner to learn more about their current sustainment budgets, goals and targets. We develop funding scenarios that will allow the owner to evaluate:</p> <ul style="list-style-type: none"> <li>• The appropriate level of reinvestment is necessary to maintain current building conditions</li> <li>• The potential deleterious impact building conditions if reinvestment is underfunded</li> <li>• The optimum amount of funding to assure the building portfolio maintains operations for their intended mission.</li> </ul> <p>Our work products result in persuasive data sets that are used to successfully secure additional funding and/or hire additional staff to maintain their facilities and transform reactive maintenance programs into preventive maintenance programs. But we don't stop here. Once our clients receive the additional funding, pass a school bond etc., we are available to help keep their capital planning and maintenance solutions updated. We assist them in annual reviews and tracking metrics to demonstrate building conditions are improving and that they are good stewards of the funding that has been provided for reinvestment into the portfolio.</p>

49	<p>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>	<p>ALPHA's unique attributes continue to be documented through successful sales totaling over \$5M and joint sales with our teaming partners totaling \$9M with a combined total of \$14M in sales. The most unique attributes our company offers with our asset management services and capital, environmental planning and workforce readiness software to Sourcewell participating entities is that the results of our work will provide capital renewal requirements. The asset management data sets will enable participating entities to identify and build projects that will sustain, restore and/or modernize their facilities.</p> <p>Because we are working within the Sourcewell "family" of vendors, we promote the use of other qualified and capable vendors who can support the newly defined projects. We believe this is a "Win - Win - Win" for the participating entity, ALPHA and Sourcewell. Sourcewell will benefit specifically because they are offering their entities a total, turn-key solution.</p> <p>What makes our solutions unique in our industry as it applies to Sourcewell participating entities is our capital planning, environmental planning and workforce readiness software solutions allow participating entities to transform facility data into high-quality decision-making data so that project planning and prioritization efforts are taken to a new level of sophistication. Our data sets have helped our clients develop meaningful, persuasive communications that have delivered over \$11B in additional maintenance and operations budgets, and justification to hire additional staff, transforming clients' reactive maintenance programs into preventive maintenance program saving millions of dollars year. Our data sets have withstood the scrutiny of Congress and resulted in a \$4.5B construction program supporting schools in the U. S., Europe and the Pacific regions</p> <p>Our Readiness Insight software technology uniquely addresses our workforce. All areas of our clients' asset management processes need people -- the workforce. No matter the size of the organization, there is a need to carefully manage the requirements of the mission they serve and the skilled workforce that leads, implements, manages and executes all aspects of asset management. In concert with the many key elements of Human Resource Management, skills management is asset centric. There can be no effective or efficient tangible or intangible asset management without workforce skills management.</p>
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**Table 5B: Value-Added Attributes**

Line Item	Question	Certification	Offered	Comment
50	Select 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 and a listing of dealerships, HUB partners or re-sellers if available. Select all that apply.		<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Small Business Administration (SBA) Socio-Economic Designations:</p> <ul style="list-style-type: none"> <li>• Small Business (SB)</li> <li>• Service Disabled Veteran Owned Small Business (SDVOB)</li> <li>• SBA Certified Small Disadvantaged Business (SDB)</li> </ul> <p>Department of Veteran Affairs Center for Verification and Evaluation (CVE)</p> <ul style="list-style-type: none"> <li>• Service-Disabled Veteran Owned Small Business (SDVOB)</li> </ul> <p>Texas Historically Underutilized Business (HUB)</p> <p>South Central Texas Regional Certification Agency</p> <ul style="list-style-type: none"> <li>• Disabled Individual Business Enterprise (DIBE)</li> <li>• Hispanic American Business Enterprise (HABE)</li> <li>• Minority Business Enterprise (MBE)</li> <li>• Small Business Enterprise (SBE)</li> <li>• Veteran Owned Business Enterprise (VBE)</li> </ul> <p>*Supporting documentation uploaded.</p>
51		Minority Business Enterprise (MBE)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
52		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	
53		Disabled-Owned Business Enterprise (DOBE)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
54		Veteran-Owned Business Enterprise (VBE)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
55		Service-Disabled Veteran-Owned Business (SDVOB)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
56		Small Business Enterprise (SBE)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
57		Small Disadvantaged Business (SDB)	<input checked="" type="radio"/> Yes <input type="radio"/> No	
58		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	

**Table 6: Pricing (400 Points)**

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *	
59	Describe your payment terms and accepted payment methods.	Most of our contracts are Net 30. However, we understand our client base may not always be able to support Net 30. ALPHA is known for "never failing to negotiate a contract with a client who wanted to hire us to support their asset management program." This is a true statement. ALPHA has always found a means to develop a scope that supports our client's goals and budget. The same is true for payment terms, ALPHA is flexible and adaptable.	*

60	Describe any leasing or financing options available for use by educational or governmental entities.	<p>Our traditional milestone billing for the duration of the contract is substantially like leasing and extended payment options. For our larger projects, our professional services are billed monthly for the duration of the contract based on the percent of work completed throughout the month. During the project set up and kick off with the client, we walk through the billing cycles and invoice process to ensure a mutual understanding prior to beginning work on the project. Invoices are generally sent at the beginning of the month and if discussed in advance, we can adjust workflow to accommodate project needs and billing cycles.</p> <p>In the event a client requires leasing or financing options, ALPHA is open to learning more about the client's needs. The fee for our software subscription is billed annually.</p>	*
61	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	<p>The asset management professional services together with our capital planning, environmental and work force management software solutions require custom proposals and fee proposals.</p> <p>ALPHA does not propose to use template agreements or transaction documents to Participating Entities.</p> <p>Traditional transaction documents (order forms, terms, and conditions, service level agreements etc.) have not been utilized since the original Sourcwell contract award in 2021. Based on our experience of successfully selling and executing over \$5M of work under our current Sourcwell contract, we do not foresee the need to modify our current processes.</p> <p>Outlined below is a description of the sales documents used to transact sales:</p> <ul style="list-style-type: none"> <li>• Proposal Documents - ALPHA proposals include scopes of work that align with each client's desired services – No order forms are used, and no terms and conditions are applicable.</li> <li>• Fee proposals are organized in a consistent, repeatable fashion featuring ALPHA's Sourcwell contract number and the Participating Entity member number; however, client requested services are unique to each client.</li> </ul> <p>*See example, generic fee proposal form.</p> <ul style="list-style-type: none"> <li>• Client preferred purchase orders. ALPHA relies on client-issued purchase orders, and they are unique to each client.</li> <li>• Client preferred contract documents. ALPHA relies on client-issued contract documents, if applicable, and they are unique to each client.</li> <li>• Form W-9 (Rev. March 2024), Department of the Treasury Internal Revenue Service – At the time a purchase order is issued, Client Purchasing Offices request a completed Form W-9 from ALPHA</li> </ul> <p>*Sample W-9 Form uploaded.</p>	*
62	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcwell participating entities for using this process?	ALPHA accepts P-Card procurement and payment process. There is a convenience fee of up to 4% depending on type of procurement card.	*
63	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcwell discounted price) on all of the items that you want Sourcwell 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>Attached is our proposed pricing information, which provides standard pricing data and Sourcwell discounted pricing information. We have also provided a SKU for each item in our proposal. The pricing information document has been uploaded into the Sourcwell procurement portal.</p> <p>We know our pricing will be competitive. We have never failed to negotiate an agreement on fee with a client who wanted us to provide their software solution and services to populate their system. And we have never asked for a change order that wasn't a direct response to our client's request to change the scope of work.</p>	*
64	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.	Our pricing sheet reflects an 8% discount off the published list price for services, and 15% discount for the capital planning, environmental planning and workforce readiness management software.	*
65	Describe any quantity or volume discounts or rebate programs that you offer.	Our price list incorporates an effective rate reduction based on economies of scale for portfolios with large square footage values. No additional discounts are offered currently.	*

66	Propose a method of facilitating "sourced" products or related services, which may be referred to as "open market" items or "non-contracted items". 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.	Requests for sourced, open market or nonstandard options are available upon request and a custom quote will be developed.	*
67	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 costs are included in our price list.	*
68	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	Not applicable.	*
69	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	Not applicable.	*
70	Describe any unique distribution and/or delivery methods or options offered in your proposal.	None.	*
71	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing.	<p>ALPHA Facilities Solutions, LLC has systems in place to verify and setup projects in our Accounting System. These procedures directly relate to contract documents, which ensures the project setup is correct and follows Generally Accepted Accounting Principles, GAAP. ALPHA has a segregation of duties which allows for a check and balance with project setups before they are active. These policies and procedures are viewed regularly and updated as needed or as industry standards change.</p> <p>During our annual financial audit, our external auditors examine project setups and test the process from contract award, project setup, and tests that revenue recognition complies with GAAP. Additionally, our Accounting System segments cost between direct, indirect overhead and general and administrative to assist in the development of rates. Our Accounting System has a robust project accounting reporting to ensure quarterly reporting and accounting for administrative fees.</p> <p>Additionally, client proposals reflecting Sourcewell pricing are reviewed and verified at four separate and distinct levels: 1) Business development/Sales, 2) Practice Lead, 3) Chief Practice Officer and/or Chief Client Officer, and 4) Accounting. ALPHA has successfully demonstrated the self-audit program is fully compliant with all reporting requirements and assuring Sourcewell participating entities obtain proper pricing.</p>	*

72	If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.	<p>The following approach was used successfully during the term of the original Sourcewell contract award in 2021.</p> <p>From an overall service perspective on contract performance, we measure the following:</p> <ol style="list-style-type: none"> <li>1. Client satisfaction</li> <li>2. Client referrals</li> <li>3. Accuracy of Deliverables</li> <li>4. On-Time Deliveries</li> <li>5. Ongoing Engagements</li> </ol> <p>From an overall sales perspective on contract performance, we measure the following:</p> <ol style="list-style-type: none"> <li>1. Annual Sales (by Client and Revenue)</li> <li>2. Annual Sales by Market (by Client and Revenue)</li> <li>3. Annual Sales by Service (by Client and Revenue)</li> <li>4. Annual Per Client Contract Volume</li> <li>5. Recurring/Repeat Sales (by Client and Revenue)</li> <li>6. Annual Administrative Fees to Sourcewell</li> </ol> <p>From a software perspective, a ticketing system is in place for all applications to track and measure issues reported by the client. The ticketing system is integrated into the application, so clients do not have to leave the application to submit tickets. The ticketing system also provides the user a screen capture tool which will provide the user with the ability to capture an image of the screen to submit with the ticket. The ticket is evaluated to determine if there is a training issue or application issue. This will allow ALPHA to reach out to clients to determine if they fully understand application functionality or if the application is not functioning to meet user needs.</p> <p>All applications are monitored and measured to determine uptime as well as response times to user requests. Servers are monitored 24/7 tracking bandwidth lag times as well as application availability. When bandwidth slows or the application is no longer available, E-mail messages and text messages are sent to the response team for immediate action. This information will be logged and available in reports for analysis using data, charts and graphs.</p>	*
73	Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The propose an Administrative Fee will be payable to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. The Administrative Fee will be calculated as a stated percentage, or flat fee as may be applicable, of all completed transactions utilizing this Master Agreement within the preceding Reporting Period defined in the agreement.	We propose an administrative fee of 3%. The fee will be calculated as a percentage of the Vendor's sales under the contract.	*

Table 7: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments	
74	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	Sourcewell Pricing for RFP 102424 is uploaded.	*

Table 8A: Depth and Breadth of Offered Solutions (200 Points)

Line Item	Question	Response *	
75	Provide a detailed description of all the Solutions offered, including used, offered in the proposal.	<p>We believe our services and products are a direct match and commonly desired or driven by decision-making authorities, boards, communities, regulatory requirements or represent industry best practices.</p> <p>We are offering Sourcewell participating entities with facility condition assessments, planning and related services together with state-of-the-art software solutions. Our software solutions include hosting, customization, integration, implementation, installation, maintenance, training, data collection, import, export and backup, record-keeping and reporting, mobile, cloud and web-based applications or platforms, customer service, auditing, compliance, security, and technical and user support.</p> <p>Our capital, environmental planning and workforce readiness software and services</p>	

provide a wide array of products at lower prices and with a better value than what would ordinarily be offered to a single entity.

Outlined below please find detailed descriptions of our services and technologies solutions offered within our proposal:

#### 1. Facility and Building Condition Assessment

Parametric Based Facility Condition Assessment (FCA) – Facility owners and managers need to know how well the buildings, equipment, and systems under their responsibility are performing. Maintaining up-to-date condition information on these assets enables your organizational leadership to optimize their capital renewal decisions. ALPHA's Facility Condition Assessment (FCA) services provide your organization with current first-hand assessments and condition indexes to provide insight on where each of your facilities are within their life cycle. We also provide forecasts for the remaining useful life of each system within each building so you can make informed decisions on future repairs or replacement.

Virtual Facility Condition Assessment (Client Supplied Data) – An ALPHA asset management expert will meet with you at your office to assist in organizing your facility information so that it can be quickly and efficiently uploaded into your Capital Planning Software. ALPHA will work with you to confirm cost and life cycle information so that you can generate reports that can be used in presentation materials summarizing building facility condition indices and financial needs. These reports are intended to support facility-planning activities associated with developing the next fiscal year budget.

BUILDERTM-based Facility Condition Assessment – A Facility Condition Assessment (FCA) is one of the foundational processes of a facility life cycle asset management program. The FCA process results in a better understanding of the physical condition and readiness of an organization's buildings along with the reliability of its systems and components. It also facilitates the identification of work candidates for facility repair projects. It is a critical aspect of the shift towards a proactive versus reactive facility management strategy. Instead of keeping facilities operational by relying primarily on corrective repairs (after a system or component has failed due to significant loss of function), it focuses on condition-based repairs which can be planned prior to failure. A condition-based approach can result in higher performing facilities at lower life cycle costs. The FCA will be conducted using the US Army Corps of Engineers BUILDER Engineered Management System (EMS). The BUILDER facility condition assessment process results a highly standardized and credible DoD asset management program. It supports better buying power by allowing organization leadership to better target fiscal resources to those facilities most in need of investment. Further, adopting a standard process helps ensure that condition data is justifiable and defensible. [Talk about the on-site assessment process here.]

Real Property Inventory – Real Property Inventory is identifying current assets at a site and having the knowledge to distinguish assets as found-on-sites. A Real Property Inventory is designed to recognize, quantify, and record assets of ownership. Accurate recording of the real property inventory helps to budget for preventative maintenance, disposals and capital improvements. Tools we employ include Google Earth, measuring instruments, data collection software, and cameras.

The information gained from a Real Property Inventory exercise can help to organize the collection of the information for producing informative reports that assist decision makers with budgets and capital development.

Real Property Inventory (RPI) Audits – ALPHA Facilities Solutions prepares Real Property records for Chief Financial Officer's Act (CFOA) audits. These tasks include a detailed review of your real property records and assets, and an analysis of all assets documented in the database of record. We identify real property assets having insufficient support documentation and research sources for sufficient documentation that include site validations and inventory to secure placed in service dates, size, site & category codes, and calculating depreciated PRV. We reconcile discrepancies identified in the migration from the legacy Integrated Facilities System (IFS) to the General Fund Enterprise Business System (GFEBS) and Prepare DD Forms 1354 and Memos of Attestation.

#### 2. Energy, utility, and emissions assessment and planning

ALPHA can help you determine how much energy your facilities are using, where it is being used at an individual facility, and what energy savings opportunities exist, along with estimates of the investment required, and annual savings expected, for each opportunity.

We will develop actionable recommendations by collecting and analyzing your facilities' utility bills and determining total energy usage, conducting a site analysis to

identify energy savings opportunities, and performing calculations to estimate the cost/benefit of the energy savings opportunities.

Energy Audit (Level 1) – The scope includes a site visit and staff interview to develop a basic understanding of the type of equipment present in the building and the mode of operation of that equipment. The deliverable is a brief report, outlining in bulleted form the equipment/operation identified, the typical energy consumption of such, and potential options to reduce consumption.

Energy Audit (Level 2) – The scope includes an advanced analysis of the equipment inventory that is an optional part of an FCA. For each identified make, model and serial number, the capacities and efficiencies are determined and an upgrade to 2015 International Energy Conservation Code (IECC) efficiency is assessed in terms of various financial parameters.

The deliverable is a spreadsheet listing each piece of equipment and - at least - the Net Present Value (NPV) and the Internal Rate of Return (IRR) of said upgrade to 2015 IECC or beyond.

Energy Audit (Level 3) – The scope is that of a traditional ASHRAE Level I, II or III Energy Audit. Level I includes a site visit, staff interview and cursory utility bill review in order to identify energy efficiency issues with the building. Any identified issues are categorized as low, medium or high cost to remedy based on a qualitative estimate. Level II includes the scope of Level I and adds detailed performance calculations and financial analysis for select Energy Conservation Measures (ECM) and Power Generation Opportunities (PGO). A review of Building

Automation System (BAS) trends is usually required to gather enough data for a quantitative estimate. As such, Level II is a backward-looking assessment, making use of past data. Level III includes the scope of Level II and adds sub-metering and/or whole building energy modeling for ECM or PGO which require a large outlay of capital. As such, Level III is a forward-looking assessment, making use of future data. A substantial data acquisition or model generation period without much immediate output is typical for this level. The deliverable is a comprehensive report for each building, with complexity and period of performance increasing successively from Level I through Level II and then Level III.

### 3. Site, safety, and code inspection

Infrastructure Assessments – The ALPHA team will estimate replacement values, estimate maintenance costs and frequencies, and develop a renewal schedule for infrastructure systems. We provide repair recommendations and cost estimates that are designated and grouped either as a repair item or a capital project. Life cycle cost analysis and remaining useful life is then used to develop repair and replacement recommendations. Systems included in an infrastructure assessment are roadways, parking lots, site development, water supply, landscaping, sewer systems, heating, cooling, fuel and electrical distribution, and site lighting.

Pavement Condition Assessments – ALPHA performs physical condition assessments of paved surfaces to document the current conditions. Typical assessments include vehicle and pedestrian pavements and sports courts. When as-built site drawings are not available, ALPHA calculates quantities of paved areas needing repair or replacement by digitizing marked-up Google Earth aerial photographs.

Abbreviated Accessibility Assessment (To be performed in conjunction with a facility condition assessment) – An Abbreviated Accessibility Survey can be added to your Facility Condition Assessment (FCA) to provide a preliminary capital planning budget for addressing accessibility related deficiencies. The approach to performing the Abbreviated Accessibility Survey is based on elements of the Americans with Disabilities Act (ADA) section of the ASTM-E2018 Baseline for Property Condition Assessment (PCA) standards and other industry recognized accessibility guidance documents.

Playground Safety/Compliance Inspections – A playground safety/compliance inspection is a low frequency, comprehensive analysis of the playground environment using the most current guidelines and requirements published by the U.S. Consumer Product Safety Commission and American Society for Testing and Materials (ASTM). The inspection may also include an assessment of compliance with the Department of Justice's Standards for Accessible Design.

Inspections are performed by qualified personnel possessing a current Certified Playground Safety Inspectors (CPSI) Certification from the National Recreation and Park Association (NRPA) using a CPSI Inspection Kit.

Environmental Planning Solutions – ALPHA is well-positioned to provide your organization with any environmental assessments necessary to identify and manage environmental risks within the facility infrastructure. ALPHA's staff has performed

numerous industrial hygiene services including:

- Asbestos Inspection and Management
- Lead Based Paint Inspection and Management
- Mold Inspection and Management

Asbestos Inspection, Abatement Design and Oversight – ALPHA performs all types of asbestos investigations and testing including U.S. Environmental Protection Agency (EPA) Asbestos Hazard Emergency Response Act (AHERA) surveys for schools, EPA National Emission Standards for Hazardous Air Pollutants (NESHAP) inspection for renovation and demolition projects, American Society for Testing and Materials International (ASTM) standard asbestos inspections including Baseline, Pre-Construction and Comprehensive asbestos surveys. ALPHA's employees have performed building inspections for a full spectrum of clients including hospitals, schools, commercial, residential, industrial, and government facilities. Our inspectors are highly experienced and can work with minimal disruption to your day-to-day business.

Asbestos Abatement Project Design – ALPHA develops Asbestos Abatement Project Designs that include drawings and project specifications. ALPHA assists in publishing the bid documents and the selections process to obtain a qualified asbestos abatement contractor to remove the asbestos.

Third Party Abatement Oversight – ALPHA performs 3rd Party Abatement Oversight of the abatement contractor to ensure the project scope of work is adhered to and ensure the abatement contractor meets all regulatory requirements. ALPHA collects air samples to ensure exposure levels are below requirements set forth by Occupational Safety and Health Administration (OSHA). Environmental air samples can be collected and analyzed to ensure other building occupants are not incidentally exposed. Final clearance samples are collected and analyzed to ensure area is safe for re-occupancy.

Lead in Water and Lead Based Paint - ALPHA has performed Lead Surveys to meet various regulatory requirements. Our trained technicians have experience working in Public Housing, Child Occupied Facilities, and have experience in commercial, residential and industrial sites. Our technicians have experience using X-Ray Fluorescence (XRF) lead analyzers (various manufacturers) and have experience performing testing lead in drinking water, lead-based paint chip testing and Toxicity Characteristic Leaching Procedure (TCLP) sampling to characterize deconstruction waste for disposal.

Mold – ALPHA's employees have performed mold surveys to meet various occupant and owner requirements. Our trained technicians have experience working in Public Housing, Child Occupied Facilities, and have experience in commercial, residential and industrial sites. Alpha's technicians are experienced in Targeted Sampling, Mold Screens, Comprehensive Mold Surveys, Clearance Testing and Post Clearance Testing.

#### 4. Space utilization and planning

Space/Facility Use Studies (FUS) provides an accurate graphic and non-graphic record of facility utilization data and Computer-Aided Design (CAD) floor plans. Floor plans include permanent and semi-permanent partitions, an accurate depiction of wall thickness, windows and doors, room numbers, room use, stairs, and other architectural features such as toilet partitions, water closets, urinals, sinks and lavatories, drinking fountains, built-in cabinetry, etcetera. Each space on the floor plan is labeled with a room number, area (in both square feet and square meters if desired), and description (office, restroom, corridor, corridor, etcetera). Naming conventions can include both current use (displayed by default) and designed use if current use is different than that for which the space was designed.

#### 5. Feasibility, sustainability, and lifecycle assessment

Sustainment Services – ALPHA offers a wide range of feasibility, sustainment, restoration and modernization services - Sustainment services focus on maintenance and repair activities necessary to keep an inventory of facilities in good working order. It includes regularly scheduled adjustments and inspections, preventive maintenance tasks, and emergency response and service call for minor repairs. It also includes major repairs or replacement of facility components (usually accomplished by contract) that are expected to occur periodically throughout the life cycle of facilities.

Restoration Services focus on developing a plan to restore facilities to such a condition that it may be used for its designated purpose. Restoration includes repair or replacement work to restore facilities damaged by inadequate sustainment, excessive age, natural disaster, fire, accident, or other causes.

Modernization Services include developing a plan that focuses on the alteration or replacement of facilities solely to implement new or higher standards, to

accommodate new functions, or to replace building components that typically last more than 50 years (such as the framework or foundation)

Water Resource Management is defined as the activity of planning, developing, distributing, and managing the optimum use of water. It is also considered a sub-set of water cycle management and includes the management of resources under set policies and regulations.

ALPHA specializes in assessments, analysis and alternate management practices and technology planning in the areas of water conservation through irrigation system management solutions for your real property assets. With advancements in improved irrigation technologies, owners are experiencing significant water usage reductions, decreased maintenance costs, and an increase of available funds that can be directed to other priorities. Pilot studies performed across the country where new irrigation technologies have been implemented, are seeing water usage reductions by as much 65%, with the national average hovering at 30%. Even facilities that have implemented minimal technologies are seeing 5-15% reductions. ALPHA can help you take your water resource asset management practices to the next level of your overall asset management best practices.

Furthermore, with many of clients realizing that water, which was once an abundant natural resource, is quickly becoming a more valuable commodity, they are also realizing that proper stewardship of this resource belongs to each one of us, and its use within facilities can be a major factor. ALPHA can help facility owners understand their current water consumption rates based off of their current facility and infrastructure demands and help create a water management plan that will reduce their overall usage. These reductions provide three-fold benefits, increased water efficiency, reduction in utility costs, and an increase in available funds which can be used in other areas of facility asset management and, or organizational operations.

#### 6. Asset, capital, and deferred maintenance planning

Facility Asset/Equipment Inventory – With ALPHA's asset data collection solution, we will prepare an inventory of major building related equipment including all relevant asset information and an estimate of its remaining useful life. Our inventory consists of fixed, visible, and accessible building equipment including HVAC, electrical, plumbing, commercial-grade kitchen, commercial-grade laundry, life safety, and conveying equipment. Data for each piece of equipment will include item, manufacturer, model, serial number, date placed into service, condition, remaining useful life, notes, and replacement cost. With ALPHA's optional barcode tagging service, we can tag each piece of equipment with its own individually numbered adhesive label.

Geo-Location Services (To be performed in conjunction with equipment inventory) - In conjunction with the equipment inventory for external fixed assets, each of the fixed assets will be geo located and a latitude and longitude coordinate will be assigned within GIS for mapping purposes. Layering options will need to be specified prior to asset collection.

Equipment Barcode Tagging Service (To be performed in conjunction with equipment inventory) – During the equipment inventory collection, a highly durable adhesive barcode tag will be affixed in a prominent, readily viewable location upon (or in immediate proximity to) each piece of inventoried equipment. The barcode will contain a unique identifier to help your technicians differentiate pieces of similar equipment as they perform maintenance requests. Information collected for your equipment will be permanently associated with the barcode number and can be called up with any work order management application that uses barcode scanning capabilities.

Preventative Maintenance Schedule Development – A preventive maintenance (PM) schedule helps Facility Managers proactively perform maintenance, repairs, and replacements to prevent failures before they occur. ALPHA's PM Database generates baseline PM schedules for each asset on your equipment inventory and makes recommendations of the frequencies, start dates, and PM considerations. PM scheduling helps your Facility Managers avoid unplanned downtime through proactive equipment maintenance.

As part of this service, ALPHA will work directly with you to review your PM schedules, tasks, and assigned work delegations. We will help you establish PM priorities tailor your PM schedule to suit your facility needs.

Building Information Modeling (BIM) – Our FAM professionals' talents intersect synergistically yielding best in class FAM capabilities and practices. Clients may engage our talents at any point in the cycle of their facility management (FM) practices. Our services range from beginning with using their existing BIM/CAD or creating as-built e-records integrating key workflows and business intelligence (BI)

between their operations and maintenance, planning, design, and construction management functions. We also engage in the formative stages of the design process by creating lifecycle cost models as one of many templates typically used in BIM based design processes.

Computer-Aided Design (CAD) – Computer-aided Design (CAD) or computer-aided design and drafting (CADD), is the technology used by architects, engineers, drafters and others to create precision drawings or technical illustrations. CAD and CADD software can be used to create two-dimensional drawings or three-dimensional models to help users explore design ideas and visualize concepts quickly and efficiently.

Up-to-date and accessible site and floor plans have many practical uses. For example, current site plans can be used to estimate costs for grounds maintenance and site infrastructure projects, develop snow removal plans, and master planning while up-to-date floor plans can be used for space planning, estimating scope and costs for renovation projects and custodial services contracts. When the conversion from hard copy to electronic is completed, record drawings can be safely stored, easily accessed, and backed up efficiently and space within the building formerly used for hard copy record drawing storage can be used for other purposes.

#### 7. Benchmarking services

Benchmarking – You can compare the condition of your facilities to other organizations. You can refine the comparison by limiting the other organizations to those in the same vertical market, similar square footage, average age of the facilities, replacement cost of the facilities, or the number of buildings. The data can be presented as a percent (your organization is in the top 45%) or graphically.

Data Analysis – ALPHA can perform enhanced analytics on your data. We can integrate the condition data with other data types, like geolocation information or student populations. We can provide data on how much it would cost to reach a specific condition.

ALPHA can also generate customized, defensible, comprehensive asset management plans. ALPHA will work with the client to define the Key Performance Indicators (KPI) that will be used to measure the facility's performance. ALPHA will work with the client to identify the existing projects and projected budgets. ALPHA will generate a capital spending plan that will identify the budget required to meet the desired KPI states or get as close as possible given a specific budget.

#### 8. Project selection, budget development, and program management services related to the solutions described above

Project Selection, Budget Development and Program Management – In conjunction with facility condition assessment services, we develop a list of recommended projects for improvements, repairs, renovations, and capital improvements.

Project recommendations include an estimated cost.

Projects address all deficiencies and are categorized by priority levels 1 – 5:

Priority 1: Critical (Immediate)

Priority 2: Potentially Critical Conditions that inhibit the operation of the building.

Priority 3: Deteriorating Conditions that require scheduled attention to mitigate deterioration to prevent future potentially critical conditions.

Priority 4: Recommended Projects that represent a functional improvement to the existing conditions or that improve the aesthetics.

Priority 5: Assets currently meet or exceed all performance and reliability metrics and industry standards. There are no unfunded or deferred maintenance activities at this time.

Financial Management – Our people have extensive experience providing financial management services including Audit Readiness and Sustainment, Risk and Internal Controls, Financial Statement Preparation and Reporting, Business Process Improvement, and Information Technology (IT) Controls. ALPHA leverages these experiences to assist our clients with meeting the complex needs of the Financial Accounting Standards Board (FASB), Federal Accounting Standards Advisory Board (FASAB), and Chief Financial Officer's (CFO) Act. In addition, ALPHA leverages these experiences to assist our client with meeting the regulations put out by the Securities and Exchange Commission (SEC), Government Accountability Office (GAO), and Office of Management and Budget (OMB). We help clients meet and maintain compliance with accounting and financial management standards while continuing to achieve the entity's mission and vision.

#### 9. Capital Planning Software Solution - Asset Performance Planning Solution

## (APPS)

Asset Performance Planning Solution (APPS) – The APPS web-based application has been developed by ALPHA Facilities Solutions to collect, manage, and evaluate large volumes facility condition data associated with your organization's capital improvement program. APPS employs a robust SQL-based scalable relational database engine. This software application forecasts backlog and capital renewal requirements, providing quantifiable and defensible justification for capital funding requests. APPS has the capability to serve as a foundational element of your Capital Renewal and Deferred Maintenance (CRDM) program.

Designed for use by Facility Managers and their staff, APPS provides a straightforward and reliable method for inventorying, estimating, tracking, and updating facility deficiencies. APPS' built-in quality control functions assure the accuracy and uniformity of data entry, analysis, and reporting.

## Product Features:

- Non-proprietary
- Simultaneous user access
- User-based Security
- Compatible with existing software applications such as CMMS and BIM systems
- Standardized reports, including:
  - Summarized costing information
  - Individual deficiency details
  - Forecasted renewal costs by year
  - Flexible data sorting to meet user requirements

## Product Description:

APPS provides a user-friendly tool for capital forecasting, comprehensive deficiency tracking, building system life cycle forecasting, asset tracking for major fixed equipment, and adjustable cost data using industry standard cost databases. These features help facility management staff efficiently develop cost estimates for long range capital planning.

APPS uses a robust scalable relational database engine based on SQL that is Open Database Connection Compliant (ODBC) and accessible as a true Application Service Provider (ASP) application. As a web-based application, it is independent of the user's operating system and device. It is non-proprietary and forward compatible with evolving technologies. APPS performs equally well on a PC, or tablet on any major operating system. The number of concurrent users is scalable, and the server hardware will be customized to support your user community.

## Application Use:

Facility assessors enter basic portfolio information into the database such as facility names, construction dates, and building gross square footage. They then input building system renewal histories, current system conditions, and the estimated system lives based on industry standard libraries or historical knowledge. The application will compute the projected years of the next replacements for each system. (Users have the capability to overwrite automated projections if desired based on user knowledge.) APPS will also calculate replacement costs of each system based on standard cost data for the year replacement occurs. Assessors can enter notes, photos and other key attachments directly into the application.

Users can also enter fixed equipment assets into APPS. APPS can maintain many attributes of the equipment inventory, including photos and other attachments. APPS will forecast upcoming equipment replacement dates and will provide replacement cost estimates.

Users can also conduct an abbreviated ADA assessment. Any ADA deficiencies can be recorded in APPS as individual needs.

Once complete, APPS will evaluate all the facility data and calculate Facility Condition Indexes (FCI) for each building as well as for the total portfolio. Results can be provided through a wide variety of reporting formats based on user preferences. Reporting formats include spreadsheets, narrative reports, tables, charts and other graphic visualizations. All reports can be exported in PDF format. Other custom reporting formats are available through ALPHA's software team to meet users' individual reporting requirements.

## APPS Dashboard

The Dashboard presents simplified views of the data including data presented in a tabular form which can be rearranged, sorted, filtered, grouped and exported; and tables and plots that can be embedded into reports and presentations.

10. Environmental Planning Software Solution – MPPrimeTM

MP Prime™ Environmental Data Management Solution MPPrime™ is a state-of-the-art, cloud-based environmental compliance tool used to collect, report, and manage data pertaining to regulated materials (e.g., asbestos, lead-based paint, universal waste and other indoor environmental hazards) present at your facilities. Maintaining material information within the MP Prime™ database streamlines your environmental compliance program by allowing you to centrally manage your data and quickly generate EPA-compliant reports and management plans. Reporting can also be customized as needed to suit your organizations specific requirements.

#### 11. Workforce Readiness Software Solution – Readiness Insight (RI)

Readiness Insight is a cloud-based solution that helps organizations quickly and confidently configure training paths, learning objectives and work schedules based on job requirements. By tracking individual and group progress, verifying training milestones and reporting on your team's progress, leaders gain true visibility into their organizational readiness. In one organized repository, you can capture and monitor personal records associated with computer-based training, job performance, on-the-job training, interactive work history and exams.

RI key benefits are reduced liability, system flexibility, qualification data, and DocuSign Envelope ID: B7A65BAA-EEBA-4299-B4FA-F16113EBBA26 improved efficiency. Manage risk and mitigate liability with easily accessible evidence of readiness. Uncover weaknesses to drive specific, targeted training and corrective action.

Assimilate existing paper records and recreate and transform processes into a formal system. Organize and improve existing business practices and standardize training information in one repository.

Interactive dashboards and real-time analytics make it easy to track qualifications using role-based access and management. View organization wide qualification levels down to the individual and update requirements as necessary.

Take back time in your day and remove administrative delays of pushing paper. Aggregate multiple spreadsheets, datasets, and processes within the system and access detailed reporting under comprehensive dashboards.

Ensuring personnel readiness is essential within government organizations but if your system is difficult to maintain or doesn't offer the right level of visibility, errors can be made that cause your department serious liability issues and compromise your compliance. RI enables you to plan, build, manage and assess your team's readiness within a single, authoritative dashboard.

76	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	<p>Our asset management services together with our capital, environmental planning and workforce readiness software provide a wide array of products at lower prices and with a better value than what would ordinarily be offered to a single entity. Included below please find the subcategory titles that best describe our products and services and are shown in our pricing sheet.</p> <p>Services</p> <p>Facility Assessments</p> <ul style="list-style-type: none"><li>• Educational Facility Portfolios</li><li>• State/Municipal Facility Portfolios</li><li>• Healthcare Facility Portfolios (Senior Living)</li><li>• Healthcare Facility Portfolios (Hospital)</li><li>• Industrial / Manufacturing Portfolios</li><li>• Corporation Portfolios</li><li>• Parks and Recreation Portfolios</li></ul> <p>Environmental Services</p> <ul style="list-style-type: none"><li>• Educational, Residential, Administrative Facilities</li><li>• Healthcare Facilities</li><li>• Light Industrial Facilities</li></ul> <p>Miscellaneous Asset Management Services</p> <ul style="list-style-type: none"><li>• Parametric Based Facility Condition Assessments</li><li>• Real Property Inventory</li><li>• Real Property Inventory (RPI) Audits</li><li>• Infrastructure Assessments</li><li>• Pavement Condition Assessments</li><li>• Playground Safety/Compliance Inspections</li><li>• Space/Facility Use Studies</li><li>• Sustainment Services</li><li>• Restoration Services</li><li>• Modernization Services</li><li>• Water Resource Management</li><li>• Building Information Modeling (BIM)</li><li>• Computer Aided-Design (CAD) Services</li><li>• Benchmarking Services</li><li>• Data Analysis Services</li><li>• Project Selection, Budget Development and Program Management</li><li>• Financial Management and Audit Readiness</li></ul> <p>Software</p> <p>Readiness Insight Software for Skilled Workforce Management</p> <p>Asset Performance Planning Software (APPS)</p> <ul style="list-style-type: none"><li>• Public K12 Schools</li><li>• Private K12 (non-boarding)</li><li>• Higher Ed w/ Housing, Private Boarding</li><li>• Government</li><li>• Healthcare</li></ul> <p>MPPPrimeTM</p> <ul style="list-style-type: none"><li>• Public K12 Schools</li><li>• Private K12 (non-boarding)</li><li>• Higher Ed w/ Housing, Private Boarding</li><li>• Government</li><li>• Healthcare</li></ul> <p>Training</p>
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Table 8B: Depth and Breadth of Offered Solutions

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

Line Item	Category or Type	Offered *	Comments
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77	Facility and building condition assessment and auditing	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>At ALPHA, we have one business - Asset Management. Facility and building condition assessments are a core service offering. Our work products have undergone the scrutiny of Congress and have helped our clients secure more than \$11 Billion in funding for facility repairs, renovations and replacements.</p> <p>In support of our asset management services, we offer our capital planning software known as Asset Performance Planning Software. This powerful combination of service and software presents a robust Asset Management Software planning product. This integrated offering provides a unique value add to Sourcewell participating entities because we bring together our software and services expertise to merge separately managed and budgeted realms of Capital Planning, Operations and Maintenance and other major programs such as environmental planning, bond planning, energy planning, etc. by documenting holistic needs and accountable measures of success.</p>	*
78	Energy, utility, and emissions assessment and planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA offers a complete suite of energy and related assessment services including ASHRAE Level 1, 2 and 3 audits, energy modeling, and utility gap analysis.</p> <p>We preform detailed examinations of how facilities use energy and other controllable utilities, quantify the buildings' energy and water consumption, the cost of energy, technical analysis of the buildings and associated systems and provide a set of recommendations to reduce the energy costs.</p> <p>As part of a total facility condition assessment, energy management, conservation evaluations, and energy audits can be added to a scope of work to make the complete process even more efficient. By adding energy and emissions to age and condition, building portfolio managers have a comprehensive view of their capital needs. ALPHA works to identify building-specific systems where readily achievable energy conservation opportunities exist and integrates those recommendations into the overall capital plan. Evaluations are based on LEED(r) reference materials for Green Building Operations and Maintenance and on ASHRAE standards for Level I and Level II energy audits. Unique building scoring metrics and benchmarking are capable of being developed along with flexible, custom databases.</p>	*

79	Site, safety, and code inspections	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA offers a complete suite of site, infrastructure, safety, security, abbreviated accessibility survey, tree and playground assessments, and environmental assessments including asbestos, lead, and mold inspections.</p> <p>In support of our environmental services, we offer our MPPPrime™ environmental planning software. ALPHA's services and software offer a unique value add to Sourcewell participating entities because we transform services and software into a turn-key solution.</p>	*
80	Space utilization and planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	ALPHA offers a full suite of space utilization, space planning, capacity, BIM and CADD services.	*
81	Geographic information system (GIS) services	<input checked="" type="radio"/> Yes <input type="radio"/> No	ALPHA offers a complete suite of GIS services. The purpose of our work effort is to capture the roof polygons for the purposes of generating layers with ESRI of the roof systems. Data attributes to be collected for the roof polygons will include roof type, square footage, age, condition and replacement values. Roof polygons are color coded to depict current condition so that the district can see a heat map of their roofs with ArcGIS. Feasibility, sustainability, and lifecycle assessment.	*
82	Feasibility, sustainability, and lifecycle assessment	<input checked="" type="radio"/> Yes <input type="radio"/> No	ALPHA offers a full suite of feasibility, sustainability and lifecycle assessments. With every facility condition assessment, we offer our clients the ability to develop plans to sustain, restore and modernize their building portfolios. Our software solutions support expansive data analytics, the generation of key performance indicators and other visuals to develop compelling, persuasive data sets to secure additional funding, grow maintenance staff and garner support from decision making groups.	
83	Asset, capital, and deferred maintenance planning and asset classification	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Built Environment - ALPHA offers a full suite of asset, capital and deferred maintenance services. We feature asset/equipment inventory, barcode/QR tagging, preventative maintenance schedule development and turn-key software implementation services. Our work products and deliverables result in fully implemented capital planning programs, work order management systems and executable project plans. Our clients hire us because they need to transform their reactive maintenance programs to reactive programs. They are tired of their projects picking them.</p> <p>Our turn-key approach of coupling asset management services with technology solutions is the winning combination that supports timely system implementations and allows our clients to immediately begin building their capital planning and maintenance and operations programs.</p> <p>Workforce Readiness Management - All areas of our clients' asset</p>	

management processes need people-the workforce. No matter the size of the organization, there is a need to carefully manage the requirements of the mission they serve and the skilled workforce that leads, implements, manages and executes all aspects of asset management. In concert with the many key elements of Human Resource Management, skills management is asset centric. There can be no effective or efficient tangible or intangible asset management without workforce skills management.

Workforce readiness management enables an organization to inventory the talent and expertise of the workforce and reconcile it against the needs of the organization and support mission readiness. Goals can be set to address specific skill needs and then compared against actual staffing to identify gaps. It also provides greater visibility into real-time readiness of selected personnel and/or capabilities. Having the ability to plan to know where talent and expertise will be needed can serve as the foundation for establishing mission critical training and educational programs that can be certified and offer growth potential to motivate the workforce. Benefits include:

- Critical Skills Management: Inventory and reconcile the talent and expertise of the workforce against the needs of your organization to support mission readiness.
- Connecting the Enterprise: Realizing the benefits of a centralized database to automate, track and manage all of the workforce readiness processes all from within a single web-based application.
- Managing Training: Managing and tracking personnel training can be a time consuming and overwhelming. Ensuring your workforce training credentials are accurate is important when assessing the next mission's needs and knowing who on your team has the necessary skills for execution.
- Tracking Certifications: As new members of your workforce arrive, tracking and maintaining their training, experience and qualifications is critical in establishing their baseline.

Readiness Insight (RI) - In support of our asset management services, we offer our Workforce Readiness software solution. ALPHA's services and software offer a unique value add to Sourcewell participating entities because we transform services and software into a turn-key solution.

84	Benchmarking services and quality assurance	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA offers a comprehensive suite of benchmarking and data analytic services. Our in-house team of data scientists lead these efforts. ALPHA has compiled a data set from education, state, municipal, healthcare, hospitality and federal client databases. This data set allows us to generate comparative analysis to help our clients compare the condition/performance of their facilities to other organizations within the same vertical market, similar size, age etc.</p>
85	Project management and coordination with facility owners	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA's asset management services feature a set of project management deliverables that features a list of recommended projects for improvements, repairs, renovations, and capital improvements. In collaboration with facility owners, project recommendations are developed and include estimated costs and are assigned priority levels 1-5.</p>
86	Contract management and financial monitoring	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA's contract management and financial monitoring services are embedded with our Program Management services. Contract management services include contract development, scope of work, project schedule, budget, period of performance, and facilitating clarification discussions up through contract execution. This service includes analysis to maximize operational and financial performance while reducing financial risk to our client.</p> <p>ALPHA provides contract monitoring to ensure all parties adhere to their obligations and meet the contract objectives—and to identify and address any developing problems or issues. Our services include continuous oversight, from verifying compliance and tracking performance to manage risks and to assure the project is completed on time and within budget.</p> <p>Stage 1: Contract Initiation.            Stage 2: Contract Creation, Scope of Work and Negotiation.            Stage 3: Contract Approval.            Stage 4: Contract Execution.            Stage 5: Contract and Financial Monitoring and Management.            Stage 6: Contract Renewal or Termination.</p>

87	Budget development, and program management services	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA offers a broad range of program management services. We serve as our client's trusted advisor and provide a strategic oversight function responsible for the consistent delivery of small, mid and large-scale initiatives.</p> <p>Program management engagements also feature contract management and financial monitoring services.</p> <p>Key aspects of our program management plans include the organization, approach and timeline, project controls, schedule and resource management, tools, technology solutions, quality management, communication plans and inclusion of small businesses, if applicable.</p> <p>Budget development and management services focus on estimating, allocating and controlling costs associated with a single project or multiple related projects. In collaboration with our clients, we plan the budget, track expenses and ensure the project stays within the approved financial budget.</p>
88	Assessment and planning services complementary to the offering of solutions described in lines 77 to 87 above.	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA offers the following suite of complementary asset management services complementary to assessment planning services:</p> <p>Asset Management Services</p> <ul style="list-style-type: none"> <li>• Data Sustainment Services</li> <li>• Economic Analysis</li> <li>• Asset Management Plan Development and Updates</li> <li>• Long-Range Facility Master Planning</li> <li>• Data Analytics and Development of Key Performance Indicators</li> <li>• Commercial Off the Shelf (COTS) Technology Solution Implementation - Capital Planning</li> <li>• Commercial Off the Shelf (COTS) Technology Solution Implementation – Maintenance and Operations</li> <li>• Commercial Off the Shelf (COTS) Technology Solution Implementation – Other</li> <li>• Asset Management Technical Support Services – Data Services to Support 3rd Party Software Solutions</li> <li>• Life cycle Project Delivery (Application of asset management life cycle best practices to pre-design, design, construction, operations, maintenance and total cost of ownership)</li> <li>• Predictive Asset Performance Analytics (Real time Facility/Building System Asset Condition Assessment)</li> <li>• Parks and Recreation Assessments</li> <li>• Geo-Location Services</li> <li>• Data Import Services from 3rd Party CMMS Providers</li> </ul> <p>Environmental Services</p> <ul style="list-style-type: none"> <li>• Clean Air Act Compliance</li> <li>• Clean Water Act</li> <li>• Pollution Prevention</li> <li>• Multi-Media and Single Media</li> </ul>

			<div>Facility Audits<ul style="list-style-type: none"><li>• Complex Environmental Quality Compliance</li><li>• Conservation / National Environmental Policy Act</li><li>• Resource Conservation and Recovery Act</li></ul></div> <div>Federal – U. S. Army Asset Management Services (Sourcewell Intergovernmental Service Agreement Related Services)<ul style="list-style-type: none"><li>• Area Development and Transportation Plan Development</li><li>• Customer Concept Document and Programming</li><li>• Installation Guide Development</li><li>• SMS and eSMS Support (BUILDER, Roofer, Paver, Railer, Fueler</li><li>• Installation Status Report Support</li><li>• Data Analysis, Data Analytics and Development of Key Performance Indicators</li><li>• Real Property Inventory and Audit Readiness Support</li><li>• Real Estate Action Support</li><li>• MILCON Program Support</li><li>• Equipment Modernization Support</li><li>• Master Planning Support</li><li>• Army Modernization Support</li><li>• GIS Support</li><li>• General Fund Enterprise Business System (GFEBS) Support</li><li>• Restoration and Modernization Program Support</li><li>• Barracks Program Support</li></ul></div>
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Table 9: Exceptions to Terms, Conditions, or Specifications Form

**Line Item 89. NOTICE:** To identify any exception, or to request any modification, to Sourcewell standard Master Agreement terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Master Agreement 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 Master Agreement.

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

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](#) - Pricing\_7.74\_ALPHA\_Sourcewell Pricing\_FINAL 10.24.24.pdf - Thursday October 24, 2024 08:00:00
- [Financial Strength and Stability](#) - Financial strength\_2.A.13\_ALPHA.pdf - Thursday October 24, 2024 08:10:55
- [Marketing Plan/Samples](#) - Marketing 4.40\_ALPHA K12 brochure and FED BUILDER brochure examples.pdf - Thursday October 24, 2024 07:55:33
- [WMBE/MBE/SBE or Related Certificates](#) - 5B Certificates\_Value Add Attributes\_ALPHA SB\_MBE\_SDVOSB\_HUB.pdf - Thursday October 24, 2024 08:13:46
- [Standard Transaction Document Samples](#) - 6.61\_Standard Transaction\_ALPHA fee template and W-9.pdf - Thursday October 24, 2024 07:54:42
- Requested Exceptions (optional)
- [Upload Additional Document](#) - 2A.18 Certs and 3.32 Forecasting.pdf - Wednesday October 23, 2024 21:21:30

## Addenda, Terms and Conditions

### PROPOSER AFFIDAVIT OF COMPLIANCE

I certify that I am an authorized representative of Proposer and have authority to submit the foregoing Proposal:

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 award.
3. The Proposer certifies that:
  - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
    - (i) Those prices;
    - (ii) The intention to submit an offer; or
    - (iii) The methods or factors used to calculate the prices offered.
  - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
  - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
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 is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. 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, 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. - John A. Garcia, Chief Executive Officer, ALPHA Facilities Solutions, LLC

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
<b>Addendum_8_RFP_102424_Facility_Assessment</b> Wed October 16 2024 04:32 PM	<input checked="" type="checkbox"/>	2
<b>Addendum_7_RFP_102424_Facility_Assessment_&amp;_Planning</b> Fri October 11 2024 02:15 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_6_RFP_102424_Facility_Assessment</b> Fri October 4 2024 02:43 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_5_RFP_102424_Facility_Assessment</b> Wed October 2 2024 01:31 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_4_RFP_102424_Facility_Assessment</b> Tue October 1 2024 10:09 AM	<input checked="" type="checkbox"/>	1
<b>Addendum_3_RFP_102424_Facility_Assessment</b> Fri September 27 2024 08:36 AM	<input checked="" type="checkbox"/>	1
<b>Addendum_2_RFP_102424_Facility_Assessment</b> Tue September 17 2024 08:47 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_1_RFP_102424_Facility_Assessment</b> Wed September 11 2024 02:41 PM	<input checked="" type="checkbox"/>	1