Sourcewell

MASTER AGREEMENT #110724
CATEGORY: Artificial Intelligence (AI) Readiness, Implementation, and Support Services
SUPPLIER: Cadence Solutions Inc.

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 Cadence Solutions Inc., 203-4103 97th Street, Edmonton, Alberta T6E 6E9 Canada (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 March 31, 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 (Solicitation #110724) to Participating Entities. In-Scope solutions include:

    a) AI readiness assessments;
    b) AI strategy and roadmap development;
    c) Responsible AI policy development;
    d) Implementation and support services, including:
        i)   Infrastructure and technology recommendations
        ii)   Data preparation
        iii)   Proof of concept
        iv)   Custom AI model development
        v)   Pilot project
        vi)   Deployment and integration
        vii)   Ongoing support and maintenance; and
    e) Training and education.

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 Sourcewell 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 Sourcewell 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. Sourcewell 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.

<table>
<tr><td>Sourcewell</td><td>Cadence Solutions Inc.</td></tr>
</table>

Signed by:
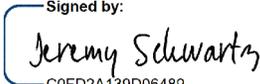
Jeremy Schwartz

By: _____C0FD2A139D06489..._____

Jeremy Schwartz
Title: Chief Procurement Officer

Date: ___3/28/2025 | 9:08 AM CDT___

Signed by:

Jordan Uytterhagen
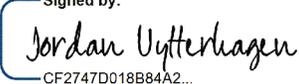
By: _____CF2747D018B84A2..._____

Jordan Uytterhagen
Title: Founder & CEO

Date: ___3/27/2025 | 4:03 PM CDT___

RFP 110724 - Artificial Intelligence (AI) Readiness, Implementation, and Support Services

Vendor Details

Company Name:	Cadence Solutions Inc.
Does your company conduct business under any other name? If yes, please state:	Cadence Solutions Inc.
Address:	#203, 4103 97 Street NW Edmonton, Alberta T6E6E9
Contact:	Jerad Uytterhagen
Email:	jerad@cadencesolutions.ca
Phone:	587-416-6494
HST#:	

Submission Details

Created On:	Thursday October 10, 2024 11:15:00
Submitted On:	Thursday November 07, 2024 10:08:06
Submitted By:	Jerad Uytterhagen
Email:	jerad@cadencesolutions.ca
Transaction #:	7d33ad52-6fdd-4725-8d0c-d8ce3c92d793
Submitter's IP Address:	184.67.61.174

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.	Cadence Solutions Inc.	*
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	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).	N/A	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	Cadence Solutions does not currently have a CAGE (Commercial and Government Entity) code or a Unique Entity Identifier (UEI). However, we are prepared to obtain any necessary identifiers to meet the requirements of this RFP and facilitate contracting with government or cooperative entities. Please let us know if additional information is needed on this process.	*
5	Provide your NAICS code applicable to Solutions proposed.	541611 – Administrative Management and General Management Consulting Services 541690 – Other Scientific and Technical Consulting Services 518210 – Data Processing, Hosting, and Related Services 541513 – Computer Facilities Management Services 541511 – Custom Computer Programming Services 541512 – Computer Systems Design Services 541519 – Other Computer-Related Services	
6	Proposer Physical Address:	203 - 4103 97 Street Edmonton, Alberta T6E 6E9 Canada	*
7	Proposer website address (or addresses):	cadencesolutions.ca	*
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):	Jordan Uytterhagen Founder & CEO 203 - 4103 97 Street Edmonton, Alberta T6E 6E9 Canada jordan@cadencesolutions.ca 1-780-935-6901	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Jerad Uytterhagen Business Development 203 - 4103 97 Street Edmonton, Alberta T6E 6E9 Canada jerad@cadencesolutions.ca 1-587-416-6494	*
10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Lindsay Wierzba Executive Assistant 203 - 4103 97 Street Edmonton, Alberta T6E 6E9 Canada lindsay@cadencesolutions.ca 1-587-412-2117	

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.	Cadence Solutions, founded in 2013, has established itself as a leader in digital transformation, with a distinct focus on AI readiness, data governance, and regulatory compliance. Since our inception, we have successfully delivered over 100 projects across 50+ locations in the United States and Canada, serving clients across the public sector, State and Local government, education, financial services, utilities, energy, insurance, and other non-profit entities. Many of our past and current clients are already Sourcewell participating entities. We have also completed a project for the Rural Municipalities of Alberta (RMA); from which the Canoe Procurement Group of Canada is a division of. We continually meet out clients' expectations of delivering innovative solutions that enhance operational efficiency, ensure regulatory compliance, and effectively support their goals in AI readiness, seamless implementations, and responsive support services. Our journey began with a County ECM implementation, where our founder, Jordan Uytterhagen, identified the common gap between client needs and implementation outcomes. This experience inspired the creation of Cadence Solutions, where client priorities and transparency are at the heart of every project. Our core values—, Consistent Resourcing, Cost Control, Honesty, and Delivery—guide our approach. We assign named resources to each project, avoiding the "bait-and-switch" and ensuring top-quality expertise throughout the project lifecycle. Transparency and cost control are integral to our forecasting, allowing us to meet realistic goals and deliver precisely what we promise. This commitment builds trust with our clients, ensuring projects stay on track and aligned with expectations. As a recognized Microsoft partner in Modern Work, Content AI, and a member of the exclusive Microsoft Risk and Compliance Advisory program (one of only 24 partners globally), Cadence Solutions brings deep expertise in Microsoft Copilot, M365, SharePoint, Microsoft Purview, and the Power Platform. We empower organizations to leverage these powerful platforms for effective AI integration, enhanced information management, and comprehensive compliance. Our services address the full spectrum of AI readiness, guiding clients through assessments, strategic planning, and deployment while ensuring data governance and compliance. Our consultants are certified in Enterprise Content Management (ECM) and Enterprise Records Management (ERM) bring unparalleled expertise to every project, ensuring that Sourcewell entities would have access to industry-leading resources and insights. By joining Sourcewell's vendor list, we would bring a trusted track record of success, a client-centric approach, and cost-effective solutions that meet the high standards of cooperative purchasing. Our commitment to honesty and transparency makes us a reliable partner, dedicated to helping Sourcewell members achieve their digital transformation goals with clarity and confidence.
12	What are your company's expectations in the event of an award?	In the event of an award, Cadence Solutions envisions a productive partnership with Sourcewell that will significantly enhance access for government organizations, especially smaller municipalities, to engage our implementation and managed services. Sourcewell's cooperative procurement framework would allow government entities, particularly those with limited procurement resources, to bypass traditional purchasing barriers and streamline access to our tailored, high-quality services. This access is crucial, as we have found that smaller municipalities often need support in executing digital transformation and AI projects but can be discouraged by the complexities of procurement processes and purchasing thresholds. Cadence Solutions has a history of successful collaboration with public sector organizations, including municipal governments, and we understand the critical need for flexible and accessible service options. We anticipate that, with Sourcewell's support, we will reach a broader range of participating entities who may otherwise be restricted by internal purchasing thresholds. Our services are built to scale according to each organization's unique needs, making this streamlined procurement path an ideal solution for entities across various sizes and budgets. Cadence Solutions will take an active role in marketing our services to Sourcewell's participating entities, including a focused outreach to Canadian members of the Canoe Procurement Group of Canada. We are committed to ensuring that these entities are fully aware of the advantages and efficiencies that the Sourcewell procurement model offers. Additionally, a lead sales representative brings extensive experience in marketing and selling through RMA and Sourcewell channels, equipping us with the insights and expertise needed to reach these entities effectively and deliver value. Ultimately, our expectation is that Sourcewell's endorsement will not only expand access for participating entities across US and Canada but will also strengthen our collaborative efforts to support their AI digital transformation initiatives. This partnership will empower Cadence Solutions to deliver impactful, scalable solutions in a way that is streamlined, compliant, and accessible to a diverse range of public sector organizations.

13	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.	As a privately held corporation, Cadence Solutions does not publicly release financial statements. However, to demonstrate our financial strength and stability, we are prepared to share relevant financial information under an NDA. Additionally, we can arrange a call with our CPA and accounting firm to provide further insights into our financial health. This approach ensures that we can provide transparency and support your evaluation process while respecting our privacy protocols. Please let us know if this option would be helpful for your review.	*
14	Describe the number of US entities, both public and private, to which you have provided Artificial Intelligence (AI) Readiness, Implementation, and Support Services. Public: Private:	Public: 11 Private: 6	*
15	Describe the number of Canadian entities, both public and private, to which you have provided Artificial Intelligence (AI) Readiness, Implementation, and Support Services. Public: Private:	Public: 5 Private: 3	*
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 Sourcewell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	Cadence Solutions confirms that neither the company nor any responsible party has been involved in any bankruptcy proceedings, either current or completed, within the past seven years. We further commit to notifying Sourcewell in writing should any bankruptcy proceedings arise during the evaluation period of this RFP.	*
17	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). 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? 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?	(B) Cadence Solutions is best described as a service provider and a dedicated Microsoft partner. Our strong partnership with Microsoft is central to how we deliver high-quality products and services to meet the AI Readiness, Implementation, and Support Service needs outlined in the RFP. Through this partnership, we leverage Microsoft's extensive network and innovative AI solutions to provide Sourcewell participating entities with advanced, secure, and scalable solutions tailored to their unique requirements. Combined with our own Sales force across both the US and Canada, our sales relationship with Microsoft plays a crucial role in client engagement. With both in-person and virtual meetings, we collaborate closely with Microsoft's Global Black Belts, Technical Specialists, and Customer Success Account Managers—key Microsoft roles that bring deep technical expertise and customer insights. Microsoft Global Black Belts provide us with advanced technical strategies and support for high-impact solutions, especially in areas such as AI and complex deployments. Technical Specialists assist in refining our solution architectures, helping us align each offering with the latest Microsoft advancements, while Customer Success Account Managers support ongoing adoption and satisfaction for our clients, ensuring that solutions are effectively integrated and used to their fullest potential. Through this collaboration with Microsoft's specialized teams, we gain access to valuable insights and early product knowledge, which we integrate into our service offerings. This close relationship allows us to bring cutting-edge tools, features, and updates directly to Sourcewell participating entities, providing them with solutions that are innovative, robust, and well-supported. Cadence Solutions is committed to ongoing training, certification, and partnership with Microsoft to continually meet and exceed the expectations of our clients. Below is a list of Cadence Solutions' Microsoft Certifications that relate to us as a Service Provider, each is explained in further detail in the next question. • Content AI Partner • Risk Compliance and Advisory Partner • Modern Work Enterprise and Modern Work SMB • Microsoft Gold Partner These partnerships provide Cadence Solutions with unique access to Microsoft prospects, resources, tools, and pre-release features, allowing us to offer unparalleled service and insights to our clients. Through our close collaboration with Microsoft, we are well-equipped to help Sourcewell participating entities achieve their goals with innovative, secure, and high-impact solutions. Our salesforce works closely with Microsoft's own sales network to maximize both the number of prospects and quality of engagements; this would further be enhanced from a trusted procurement group such as Sourcewell.	*

| 18 | 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. | As an AI multi-certified Microsoft partner, we maintain an extensive range of both individual and corporate certifications in key Microsoft technologies, including Microsoft Azure, Microsoft 365, and AI solutions. These certifications ensure our team has advanced technical knowledge, which is continuously validated through Microsoft's internal scoring systems. This "proof of performance" process evaluates our project implementations, client outcomes, and customer satisfaction, ensuring we meet Microsoft's high standards.
Although not legally required to provide the services outlined in this RFP, we hold ourselves to the highest standards for our clients. We recognize that without these top-level certifications, our clients would rightfully seek other providers for their AI Readiness, Implementation, and Support Services. The Microsoft Content AI Partner is of particular significance for the services in this RFP.
•   Content AI Partner: As a Microsoft Content AI Partner, we are part of an elite, invite-only group with access to Microsoft's most advanced AI tools and early insights into new developments. This exclusive partnership enables us to bring cutting-edge AI-driven solutions to our clients with deep integration and support.
•   Risk Compliance and Advisory Partner (RCAP): Cadence Solutions is 1 of only 24 partners globally in this exclusive, invite-only program. Selection into this program requires a proven track record of successful project deliveries and expertise in managing complex risk and compliance challenges. Our inclusion highlights our advanced capabilities in this highly specialized field.
•   Modern Work Enterprise and Modern Work SMB: Cadence Solutions holds partnerships in both the Modern Work Enterprise and Modern Work SMB programs, allowing us to deliver tailored solutions for organizations of all sizes. Through these partnerships, we bring extensive expertise in Microsoft 365 and other productivity tools to enhance collaboration, security, and productivity.
•   Microsoft Gold Partner: As a Gold Partner, we meet Microsoft's highest standards for technical expertise, customer satisfaction, and a proven ability to deliver Microsoft solutions. This certification requires continuous excellence across our service offerings and reflects our strong alignment with Microsoft's industry-leading solutions.
•   ARMA International Certified Training Partner: Our strategic partnership with ARMA International, a global authority in information governance, is designed to prepare organizations for AI integration by enhancing education in data and records management. By offering hands-on training in Microsoft Purview tools for records management, eDiscovery, and data loss prevention, we equip professionals with the skills to manage information securely and responsibly. This partnership is crucial, as it ensures public entities have the knowledge needed to implement AI solutions while maintaining compliance and data protection. Furthermore, ARMA members gain exclusive access to discounted courses, broadening the impact of AI-readiness training across the information governance community. These discounts would be even greater in combination with the Sourcewell participating entity discount. | * |
| 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. | Cadence Solutions confirms that there have been no debarments or suspensions, current or past, for the company or any responsible party within the past seven years. We also commit to notifying Sourcewell in writing should any debarment or suspension status arise during the evaluation period of this RFP. | * |

20	Describe any relevant industry awards or recognition that your company has received in the past five years.	Over the past five years, we have proudly earned several prestigious industry awards, certifications, and recognitions that not only highlight our expertise but also underscore the significant benefits we bring to clients seeking both AI Strategy and Implementation services. Below are the distinctions we feel are the most relevant to the criteria laid out in this RFP. • AvePoint CAPS Certified – AvePoint Professional Services – Global (2024) In 2024, we became the first company globally to achieve the AvePoint CAPS Certification for Professional Services. This distinction reflects our advanced proficiency in data management and collaboration solutions, skills that are crucial for organizations looking to build a strong AI foundation. Our expertise ensures that clients can seamlessly manage and govern their data in preparation for AI integration. • OpenText Implementation Partner of the Year – Global (2021) Being named OpenText Implementation Partner of the Year in 2021, from over 725 companies worldwide, attests to our exceptional ability to implement and support large-scale, sophisticated data systems. This award demonstrates our capability to deliver robust and efficient solutions, a core requirement for successful AI readiness and implementation, where data quality and accessibility are key. • Microsoft Risk Compliance and Advisory Partner (RCAP) – Invite-only – Global (2023) In 2023, we were invited to join the exclusive Microsoft RCAP program, a status awarded to top-tier partners with proven expertise in risk and compliance. Our comprehensive knowledge in this area ensures that our AI solutions are designed with advanced compliance and security measures, giving clients peace of mind as they integrate AI technologies into their operations. • ARMA International M365 Training Partner – Global (2024) In 2024, we were recognized as an ARMA International M365 Training Partner, reflecting our commitment to excellence in training and education. This partnership empowers our clients with the necessary skills to manage information governance effectively, a vital component for AI support and data-driven decision-making. Our training programs prepare organizations to harness AI technologies responsibly and strategically. These accolades affirm Cadence Solutions' position as a trusted, innovative partner, equipped to deliver comprehensive AI readiness and implementation services. Our proven track record and industry-leading expertise ensure that clients can confidently leverage AI to transform their operations while enhancing data governance, compliance, and security.	*
21	What percentage of your sales are to the governmental sector in the past three years?	50%	*
22	What percentage of your sales are to the education sector in the past three years?	10%	*
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?	Cadence Solutions currently holds one state cooperative purchasing agreement with the Alberta Government, known as the Application Master Services Agreement. This state cooperative purchasing agreement with the Alberta Government is valued at $3,000,000. We do not have additional cooperative purchasing agreements at this time.	*
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?	Cadence Solutions holds a Supply Arrangement with the Alberta Government is valued at $3,000,000.	*

Table 2B: References/Testimonials

Line Item 25. Supply reference information from three customers for projects performed relevant to this RFP. Of these customers, please list at least one (1) who is eligible to be a Sourcewell participating entity.

Entity Name *	Contact Name *	Phone Number *	
Massachusetts Water Resources Authority – Eligible to be a Sourcewell participating entity)	Renata Thomas	617-305-5577	*
Jacksonville Electric Authority (JEA)	Jasen Hutchingson	904-665-7461	*
Sunshine Coast Regional District	Anne Rathbone	604-885-6800	*

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

Describe your company's capability to meet the needs of Sourcewell 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.	Cadence Solutions boasts a well-distributed and strategically located salesforce, ready to serve Sourcewell participating entities across the United States and Canada. Our team operates seamlessly across Eastern, Mountain, and Pacific time zones, allowing us to provide extended business hours and deliver a highly responsive, personalized experience to Sourcewell members, no matter their location. This geographical coverage ensures that we can quickly and efficiently respond to client needs, offering support that feels both local and timely. Our expansive sales network is further bolstered by our partnerships with industry-leading software providers, including Microsoft, AvePoint, and OpenText. When factoring in our software partners, our sales force numbers in the hundreds, spreading across all North American time zones. These partners actively promote Cadence Solutions' implementation services, helping deliver and integrate their software solutions for various clients. A key advantage of our approach is the net neutrality of our services: we are committed to recommending and implementing the solutions that genuinely benefit our clients the most, rather than favoring any single technology or AI platform. This unbiased methodology is a massive asset, allowing us to tailor solutions to each organization's unique needs. Our core salesforce includes three dedicated, full-time account executives who focus on understanding client requirements, offering personalized recommendations, and guiding clients through the purchasing process. These experienced team members already engage with numerous Sourcewell participating entities, ensuring clients receive prompt and knowledgeable support from the first inquiry to the finalization of a solution. Organized by territory and working across all verticals within their assigned regions, our account executives are equipped to address time-sensitive inquiries swiftly, providing clear and consistent communication throughout the entire sales journey. Moreover, our Founder and CEO remains actively involved in sales opportunities and relationship management across all time zones. This hands-on leadership reinforces our commitment to building and nurturing strong client relationships. By engaging directly with our clients, our CEO ensures that the full breadth of our expertise and experience is available at every stage, further enhancing client confidence and delivering exceptional service. Being selected as a Sourcewell approved supplier will greatly enhance our sales force's ability to engage with and serve Sourcewell participating entities. With streamlined procurement options, we can overcome barriers that previously deterred government organizations, especially smaller municipalities, making our services more accessible and appealing. This partnership will empower our team to drive more successful engagements and deliver tailored, high-impact solutions efficiently. By leveraging Sourcewell's respected network, Cadence Solutions will be positioned to transform opportunities into impactful results, fueling growth for both our clients and Sourcewell.	*
27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	Cadence Solutions does not utilize a network of dealers, distributors, or resellers for delivering our solutions. All services and solutions are delivered directly by our in-house team, ensuring that Sourcewell participating entities receive consistent, high-quality support and guidance from initial inquiry through to implementation and beyond. This direct approach allows us to maintain full control over service quality and responsiveness, providing a seamless experience tailored to each client's needs. While we do not rely on external sellers, our strategic partnership with Microsoft enhances our delivery capabilities. Through this relationship, we gain access to advanced tools, resources, and early insights into new technologies, enabling us to deliver innovative and robust solutions directly to Sourcewell members.	*

| 28 | Service force. | Cadence Solutions has a robust service team of 25 full-time consultants, strategically positioned to serve all time zones across the U.S. and Canada. This multi-national coverage allows us to provide responsive, hands-on support for Sourcewell participating entities wherever they are located. Our consultants are not vertically aligned but will work in verticals they have prior experience in. Our consultants are dedicated to ensuring successful implementation and ongoing support for each client, covering every stage from project kickoff to post-implementation and post-advisory support. Each consultant is trained to handle complex inquiries and deliver high-quality guidance, allowing Sourcewell members to experience smooth integration and minimal downtime.

Our service team reports directly to our VP of Business Solutions, who oversees a management team composed of both technical and business solutions managers. This structure ensures that we deliver cohesive, strategic support tailored to each client's technical and operational needs.

We also foster strong collaboration between our sales and service teams to create a seamless client experience. Our sales team coordinates closely with the service force to ensure a smooth handoff once the sales process is complete, allowing account management to continue seamlessly throughout the engagement. This integrated approach ensures that clients receive consistent support, proactive communication, and ongoing relationship management at every phase of their journey with Cadence Solutions. Our unified sales-service model empowers Sourcewell participating entities to feel continuously supported and well-guided from initial inquiry through the long-term use of our solutions, enhancing overall client satisfaction and success. | * |
| 29 | Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others. | At Cadence Solutions, our ordering process is streamlined and handled directly by our in-house team to provide a seamless and efficient experience for Sourcewell participating entities. Our Sales Executives act as the primary point of contact for all orders and inquiries, offering personalized guidance to assist clients in selecting and purchasing the right solutions for their needs. This approach is supported by our internal sales support team, which ensures efficient order processing, precise documentation, and quick responses to any questions or concerns.

While we manage the ordering process internally, we also leverage strategic partnerships with industry leaders such as Microsoft, AvePoint, and OpenText. These collaborations expand our access to advanced resources and technology, enabling us to deliver cutting-edge solutions that address evolving client needs, particularly as organizations prepare for the wave of artificial intelligence requirements. By integrating this support network into our offerings, we can enhance service capabilities, provide additional value to Sourcewell members, and unlock greater revenue potential.

In summary, our approach to order management would ensure that Sourcewell entities receive high-quality, tailored solutions with the full support of our experienced team and trusted partners. This model allows us to meet the complex and shifting demands of AI integration while delivering exceptional service and maximizing the benefits of our strategic alliances. | * |

| 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. | At Cadence Solutions, our customer service program is focused on delivering exceptional support throughout the AI readiness assessment process. Unlike core IT support, our program is tailored to guide clients smoothly through each stage of their readiness journey, making sure they're well-prepared to adopt AI effectively.
•   Dedicated Support for Every Assessment
Each client is assigned an account manager who serves as their main point of contact from start to finish. This account manager ensures communication is clear, guidance is timely, and all questions about the assessment process are answered promptly.
•   Specialized Support Structure
Our support is structured specifically around the needs of AI readiness assessments. Whether clients need help with data collection, clarification on findings, or insights into the assessment methodology, our team is equipped to provide accurate and detailed answers. More complex questions are directed to specialists to ensure responses are thorough.
•   Timely Responses Throughout the Assessment
o   General Inquiries: For routine questions, we respond within 24 hours to keep the process moving smoothly.
o   Urgent Issues: High-priority issues, like potential impacts on the assessment timeline, are addressed within one hour, with continuous updates until resolved.
o   Regular Progress Updates: We proactively keep clients informed by providing updates at every key stage, so they always know what's next.
•   Service Excellence Incentives
Our team is encouraged to maintain high standards through incentives based on client satisfaction, timely responses, and the accuracy of our guidance. This helps ensure a positive, reliable experience for each client.
•   Proactive Check-Ins and Feedback
We conduct regular check-ins to discuss progress, answer questions, and gather client feedback. This proactive engagement lets us address any concerns early and tailor our approach to meet the client's goals.
•   Ongoing Training and Development
Our team regularly updates their skills on the latest AI and Microsoft advancements, so they're well-prepared to guide clients through each stage of their readiness assessment with the most current knowledge.
The Cadence Solutions customer service program is designed in a way that would provide Sourcewell participating entities with dedicated, responsive support that makes the readiness assessment process easy to navigate, reliable, and highly informative. | * |

31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities.	In today's rapidly evolving digital landscape, few priorities are as significant to organizations as preparing for the inevitable integration with Artificial Intelligence. Cadence Solutions is uniquely positioned to support Sourcewell and its participating entities in navigating this transformation with confidence, compliance, and efficiency. Our commitment to the public sector, combined with our expertise in AI readiness, security, and information governance, makes us an ideal partner for Sourcewell members seeking to stay ahead of AI advancements in a strategic and sustainable way. Cadence Solutions is fully equipped and eager to offer our products and services to Sourcewell participating entities. With over a decade of experience in digital transformation and a strong reputation as a trusted Microsoft partner, we bring a proven suite of services that support every phase of AI adoption—from initial readiness assessments and implementation to ongoing support and optimization. Our tailored approach ensures that each public sector organization we work with receives a customized solution designed to address their unique needs and priorities. This means that Sourcewell members can not only embrace AI technologies but do so in a way that strengthens compliance, improves data governance, and drives operational efficiency. As public sector organizations increasingly seek reliable partners to guide them through AI integration, Cadence Solutions offers specific advantages that can help Sourcewell entities achieve their goals. We understand the challenges associated with balancing innovation and regulatory compliance, particularly in government and educational settings. Our tailored AI readiness and support services prioritize data security, regulatory alignment, and operational effectiveness, ensuring that Sourcewell members can adopt AI without compromising on these critical areas. With our expertise in Microsoft Purview, SharePoint, Power Platform, and related tools, we bring the best of Microsoft's ecosystem to Sourcewell's members, helping them to achieve AI maturity in a secure and structured manner. Furthermore, our core values of Consistent Resourcing, Cost Control, Honesty, and Delivery, guide our approach to every client engagement, providing Sourcewell members with the transparency, reliability, and accountability they need in a partner. We assign dedicated, highly skilled resources to each project, avoiding common pitfalls like resource "bait-and-switch" and maintaining high standards throughout the project lifecycle. This commitment to client success, coupled with transparent forecasting and cost management, means Sourcewell entities can have confidence that their projects will be delivered on time, within budget, and with the highest quality. Our ability to support Sourcewell members at every stage of AI adoption makes Cadence Solutions an asset to the Sourcewell network. We are not only committed to providing high-quality solutions but are also deeply invested in helping public sector organizations achieve sustainable success in the digital age. By partnering with Sourcewell, Cadence Solutions aims to empower participating entities with the tools, expertise, and support they need to lead confidently in AI transformation.	*
32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	As a proudly Canadian company, Cadence Solutions is fully committed to providing our services to Sourcewell participating entities across Canada through the Canoe Procurement Group of Canada. Our Canadian Public sector experience is substantial; we have successfully completed a project for the Rural Municipalities of Alberta (RMA), which the Canoe Procurement Group of Canada is a division of, and currently work with many Sourcewell participating entities in Canada. These relationships give us a deep understanding of Canadian public sector needs, allowing us to deliver tailored, high-quality solutions that are compliant, efficient, and directly aligned with public sector goals. A large percentage of our sales team has previously worked with the RMA/Canoe Procurement Group and is familiar with the organisation and importantly, its membership. This unique knowledge, combined with our established connections, means that Canadian entities we work with will benefit from streamlined procurement services, making it easier to engage Cadence for future projects. Our team's local expertise enables us to provide responsive and compliant services, further enhancing the value of our Sourcewell partnership. Our commitment to Sourcewell's Canadian participating entities is underscored by our focus on client satisfaction, transparency, and a proven track record. We look forward to empowering Canadian entities to achieve their digital transformation goals through our streamlined, reliable, and accessible service delivery model that is purposefully built to meet their needs.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	Cadence Solutions will serve all geographic areas.	*
34	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.	Cadence Solutions will not restrict any account type of participating entity from having full access to our solutions if awarded an agreement. All entities will have equal access to our services and support.	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Cadence Solutions has no specific requirements or restrictions for participating entities in Hawaii, Alaska, or U.S. Territories. We will treat Hawaii and Alaska the same as any other U.S. location, ensuring consistent access to our services and support	*

36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes	*

Table 4: Marketing Plan (100 Points)

Line Item	Question	Response *	
37	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.	Our marketing strategy will evolve significantly as we begin to promote this contract opportunity, with a focus on demonstrating the unique value we bring the Sourcewell participating entities at a heavily discounted price-point. Our primary message will highlight this offering as an innovative and efficient alternative to the traditional, time-consuming tender process. By choosing this path, participating entities can bypass the complexity and delays typically associated with tenders, opting instead for a streamlined, cost-effective, and legally secure purchasing method. The advantages of this approach are numerous: faster decision-making, reduced costs, enhanced operational efficiency, and minimized legal risks. The Sourcewell contract offers a simplified, compliant solution, providing a frictionless procurement experience compared to traditional tendering. As a Sourcewell-approved supplier, Cadence Solutions would understand our unique position to leverage the trust and reputation that Sourcewell has built through its rigorous procurement process. Since Sourcewell has already managed the tendering process on behalf of participating entities, we can confidently position ourselves as a reliable partner, offering immediate access to our solutions through this pre-vetted channel. This distinction not only simplifies the decision-making process for potential customers but also underscores the credibility and transparency of working with Cadence Solutions. When targeting the Canadian market, we will tailor our approach to align with regional expectations by emphasizing our partnership with Canoe Procurement Group and the local provincial associations that fall under the Canoe Procurement banner. Examples such as the Rural Municipalities of Alberta (RMA), whom we have already successfully completed work for, SARM, AMM, and LAS. These associations (who's members qualify under the Canoe Procurement Group of Canada), have established strong, trusted relationships with their membership, and by associating ourselves with these well-respected programs, we can quickly build trust and rapport with potential clients. Our strategy will center on conveying how our offerings, meet the specific needs of Canadian entities and seamlessly integrate with their existing procurement framework when purchasing through the Canoe Procurement Group. To reach our audience effectively, we will utilize a multi-channel marketing approach. This will include live educational webinars designed to inform and engage potential clients, targeted email campaigns to highlight key benefits, and newsletters to keep our audience updated on new opportunities. Additionally, we will leverage our website to provide detailed information about the contract, host in-person meetings to foster strong relationships, and participate in trade shows where we can demonstrate our solutions firsthand. Our social media channels will serve as a platform for ongoing engagement and outreach, while co-marketing and co-branded materials with Sourcewell and its partners, such as the Canoe, will further solidify our reputation as a trusted provider. At Cadence Solutions, we are committed to continually exploring new and creative methods to promote our high-quality services, ensuring that all participating entities recognize the value we bring to their procurement processes. Our goal is to position ourselves as the go-to choice for efficient, effective, and reliable purchasing solutions for our unique skillset. By doing so, we aim to not only meet but exceed the expectations of every entity we work with, building long-term, scalable relationships grounded in trust and mutual success. Samples of our marketing material have been provided and attached in the appropriate section.	*

| 38 | Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness. | As a successful service provider, technology and digital data are deeply integrated into both our operations and marketing strategies at Cadence Solutions. With approximately 50% of our business coming from public sector entities, we have developed a comprehensive understanding of this space and leverage advanced digital tools to enhance our marketing effectiveness. In our experience, Virtual webinars are a great example of platforms that hit home with non-profit entities and we have used these as a cornerstone of our marketing program. Key digital channels like LinkedIn, our website, YouTube, Instagram play an essential role in driving engagement and interest. One of our standout offerings is the ability to provide live demonstrations and tailored educational sessions specifically designed for participating entities, giving potential clients a firsthand experience of the value we provide.

We utilize HubSpot as our cutting-edge (CRM) system. It serves as the backbone of our marketing platform. This system allows us to track a variety of key performance metrics, including user interactions such as clicks, email opens, and feedback from marketing campaigns. By collecting and analyzing metadata, we can segment our target audience into specific sectors, which enables us to craft highly targeted and personalized messaging that resonates with each group. This data-driven approach ensures that we are consistently refining our outreach strategies for maximum impact.

In addition, we meticulously track website traffic, user behavior, and metadata to gain deeper insights into the effectiveness of our content and digital presence. By understanding how visitors engage with our website, we can continuously optimize the user experience and adapt our marketing tactics based on real-time data. These insights help shape our overall marketing strategy, ensuring that it evolves and improves over time to stay ahead of industry trends and audience expectations.

A partnership with Sourcewell would further amplify the effectiveness of these strategies by expanding our reach and enhancing our credibility in the market. By combining our existing digital marketing prowess with the trust and recognition that Sourcewell brings, we can increase engagement with participating entities, further solidifying our position as a leading service provider. Through this integration of technology, data, and strategic partnerships, we ensure that our marketing efforts are not only highly effective but also adaptable and continuously improving. | * |
| 39 | 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? | Cadence Solutions recognizes that the responsibility for driving awareness and engaging with prospective clients falls squarely on us. Our view of Sourcewell's role in promoting contracts stemming from this RFP is that it serves as a collaborative partner rather than a promoter of our services. However, Sourcewell plays a critical support role by offering tools that enhance our promotional efforts, such as co-branded marketing materials and maintaining a platform where participating entities can access information about Cadence Solutions, including our contact details. Sourcewell's, and the Canoe Procurement Group of Canada's, established reputation provides a trusted outlet for legal and compliance-related questions, offering reassurance to participating entities. When Sourcewell addresses legalities directly, it carries far greater authority than responses from individual vendors, thus adding credibility to the contract and our services.

One key aspect of Sourcewell's involvement is ensuring that Cadence Solutions is prominently featured within Sourcewell's vendor network, making us easily accessible to participating entities through Sourcewell's website and communication channels. Additionally, by aligning with Sourcewell, Cadence Solutions gains the advantage of being viewed as a vetted, trustworthy supplier—an essential factor when engaging with public sector clients. Sourcewell's established credibility in the cooperative purchasing landscape instills confidence in our services, reinforcing the notion that we are a proven leader in AI readiness and implementation.

Cadence Solutions will fully integrate the Sourcewell-awarded contract into our sales process by leveraging the distinction of being a Sourcewell Approved Supplier as a key differentiator. We will prominently showcase this partnership in our branding, whether on our website, in trade show displays, or within marketing materials. Furthermore, we will consistently highlight our Sourcewell affiliation during discovery meetings with potential clients, reinforcing the advantages of procuring through Sourcewell's pre-vetted contracts. The trust and credibility that Sourcewell brings to participating entities translate directly to confidence in our services, enabling a more streamlined decision-making process.

We will also emphasize the many advantages that participating entities gain by using a Sourcewell-awarded contract, including the efficiency, cost-effectiveness, and legal security that come from bypassing traditional tender processes. By positioning ourselves as a Sourcewell-approved vendor, we make it easier for clients to move forward with purchases, knowing that the rigorous tendering process has already been completed on their behalf. In this way, Cadence Solutions will fully leverage the trust and convenience that Sourcewell brings to public-sector procurement. | * |

| 40 | 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. | Yes, all our services are available through an e-procurement system, ensuring an efficient and streamlined process for our governmental and educational customers. In addition to our direct e-procurement capabilities, our solutions are also accessible through Microsoft AppSource, providing an additional platform for easy discovery and integration with existing systems. All customers, including ones in the governmental and educational sectors, can engage with Cadence Solutions through multiple channels, such as our website, phone consultations, email, webinars, and more. The entire process, from initial inquiry to final implementation, is handled digitally, ensuring a smooth and paperless transaction. We use eSignature technology to simplify the contract approval process, ensuring that everything can be completed online with minimal delay. Our commitment to Information Management best practices is reflected in our e-procurement approach, where transparency, efficiency, and compliance are essential. By offering our solutions through both direct e-procurement and Microsoft AppSource, we provide clients with a flexible, secure, and easy-to-use procurement experience. This has enabled our governmental and educational clients to manage their procurement needs in an organized and time-efficient manner, fully leveraging the advantages of digital procurement. | * |

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

Line Item	Question	Response *	
41	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.	Cadence Solutions provides comprehensive, tailored training solutions that meet the specific needs of Sourcewell participating entities; we know this because we have already completed many projects for your membership. Training is a key component of our service offerings, and we integrate it directly into our implementation services to ensure clients receive practical, hands-on learning throughout the adoption process. This approach empowers organizations to fully leverage the capabilities of our solutions and helps ensure a smooth and successful implementation. In addition to embedded training, we offer private, customized training sessions tailored to the unique needs of our clients. These sessions are designed to provide deep expertise in areas critical to the client's AI operations, whether focused on technical product usage or broader information governance practices. This flexibility allows us to meet a wide range of organizational goals. We have also developed three dedicated hands-on training courses: Microsoft Purview Records Management, Microsoft Purview eDiscovery, and Microsoft Purview Data Loss Prevention / Information Protection. These courses are designed to address various facets of information management and compliance, and we offer the flexibility for clients to select single courses or combine multiple courses to meet their specific training needs. Our commitment to delivering high-quality, results-driven training ensures that clients are well-prepared to excel in today's digital landscape. These training courses are accessible to a wide audience. Our 3-day hands-on public training courses cost less than $1,000USD per participant and would be even cheaper for a individual working at a participating entity. Pricing, as well an entire course breakdown, are viewable directly from our website. These cost-effective training options provide an excellent opportunity for organizations to receive top-tier education at a competitive price. We are particularly proud of our partnership with ARMA International, through which we are the exclusive Microsoft Purview training partner. ARMA International is the community of records management, information management, and information governance professionals who harness the benefits and reduce the risks of information. ARMA members receive additional discounts on all training courses listed on the ARMA International website, making our training even more accessible to the information governance community. All of our training programs are eligible for professional development credits, including AIIM International Certified Information Professional (CIP) CEUs, ICRM Certified Records Manager (CRM) CMPs, and ARMA International Information Governance Professional (IGP) CEUs. Participants in our training sessions receive certificates of completion, available in both electronic and paper formats. This certification not only validates the skills gained but also provides professional recognition for ongoing development. If preferred and mutually agreed to, we offer these courses privately, in-person, to accommodate the varied preferences of our clients. With a commitment to affordability, transparency, and quality, our training programs are designed to meet the highest standards of the industry while being accessible to organizations of all sizes. Cadence Solutions is proud to support Sourcewell participating entities with training solutions that drive excellence and empower organizations for long-term success.	*

| 42 | Describe any technological advances that your proposed Solutions offer. | Cadence Solutions' proposed solutions are driven by our exclusive relationship with Microsoft, particularly through our role as a Microsoft Content AI Partner. This partnership grants us unique pre-release access to Microsoft's latest AI products, features, and advancements, allowing us to bring cutting-edge solutions to our clients well ahead of general release. As one of a select few partners with this level of early access, we gain deep insights into upcoming AI capabilities, trends, and enhancements, enabling us to refine and incorporate these innovations into our solutions from the start. Our access to Microsoft's latest developments supports our AI Readiness offerings by equipping us with an up-to-date understanding of the newest features and best practices. This knowledge allows us to prepare Sourcewell participating entities for AI adoption in a way that aligns with the latest trends, capabilities, and security features in Microsoft's ecosystem. Leveraging tools like Microsoft Copilot, Microsoft Azure, and advanced content management capabilities, we design solutions that bring the most recent AI-driven insights, automation, and document management functionalities to Sourcewell members. Our ability to test and customize these features early translates to AI solutions that are future-ready, efficient, and aligned with organizational goals from day one. In short, our exclusive partnership with Microsoft keeps us on the cutting edge of AI technology. It also gives us a unique insight into what is coming next in the industry giving us a "crystal ball like" view into industry technological direction. This means Sourcewell members get access to innovative, reliable, and adaptable solutions that grow with them, setting them up for long-term success as they embrace AI. | * |
| 43 | Describe specific customer challenges your Artificial Intelligence (AI) services successfully addressed and provide two (2) examples that demonstrate how those challenges were overcome. | Cadence Solutions' AI services are designed to help public entities overcome common challenges in AI readiness, from infrastructure and data limitations to cultural readiness and compliance concerns. Below are two examples that highlight how our AI readiness assessments addressed specific customer challenges: 1. Canadian Forces – Enhancing Operational Efficiency through AI Readiness The Canadian Forces faced challenges in optimizing logistics and predictive maintenance to minimize equipment downtime and enhance operational efficiency. Cadence Solutions partnered with them to conduct a comprehensive AI readiness assessment, addressing several critical areas: • Infrastructure and Data Assessment: The existing IT infrastructure was not optimized for AI processing, with limitations in data storage and standardization. We recommended infrastructure upgrades and improved data handling practices to support AI-driven decision-making. • Data Quality and Maturity: Inconsistent and fragmented data was a barrier to AI integration. We evaluated data maturity across units and provided protocols for data tagging and centralized governance to improve accessibility and consistency. • Cultural and Skills Readiness: With the Canadian Forces' unique operational demands, readiness for AI-driven change varied. Our team introduced AI literacy workshops to build understanding and foster openness to data-driven processes. Outcome: The Canadian Forces implemented an incremental AI strategy, launching pilot projects in logistics and predictive maintenance. This approach has since reduced equipment downtime and optimized resource allocation, setting a foundation for expanding AI capabilities across operations. 2. Association of Professional Engineers and Geoscientists of Alberta (APEGA) – AI Readiness for Streamlined Member Services and Compliance APEGA, as a regulatory body, needed to improve its member services and compliance management processes while adhering to strict regulatory standards. Cadence Solutions helped APEGA navigate these challenges by conducting an AI readiness assessment focused on infrastructure, data governance, and compliance. • Technology and Infrastructure Analysis: We identified that APEGA's digital systems needed cloud-based solutions to handle AI processing demands. Our recommendations provided a pathway for scalable AI integration aligned with APEGA's operational goals. • Data Governance and Privacy: Due to the sensitivity of APEGA's data, privacy was a primary concern. We evaluated their data governance framework and advised on secure storage practices, data anonymization, and regulatory compliance to support AI deployment safely. • Use Case Identification and Prioritization: Working with APEGA, we identified AI use cases, such as automating compliance checks and personalizing member engagement, that could deliver significant impact. This prioritization created a structured roadmap for AI adoption. Outcome: Following our assessment, APEGA successfully implemented AI-driven enhancements in compliance management, leading to faster, more accurate regulatory checks. The improvements in member services and efficiency have allowed APEGA to allocate resources more effectively and set the stage for broader AI adoption. These two examples illustrate how Cadence Solutions' AI readiness assessments help public entities like the Canadian Forces and APEGA overcome infrastructure, data, and compliance challenges. Our approach empowers organizations to make informed, strategic decisions about AI adoption, ensuring they are well-prepared to leverage AI responsibly and effectively. | * |

| 44 | Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each. | Cadence Solutions is dedicated to sustainable practices, both within our company and through the solutions we deliver. Our green initiatives focus on reducing waste, conserving energy, and supporting clients in their sustainable digital transformations. Key initiatives include:
Digital Transformation for Paper Reduction
Our solutions empower organizations to transition from physical to digital document management, drastically reducing paper usage and minimizing the need for physical storage. By streamlining information workflows into cloud-based platforms, we help clients operate more sustainably.
Cloud-Based Solutions to Minimize Infrastructure Impact
By promoting cloud platforms such as Microsoft Azure, we support clients in reducing the need for energy-intensive on-site infrastructure. Cloud-based solutions significantly decrease the need for hardware on premises, lowering energy consumption, cooling requirements, and the carbon footprint associated with maintaining physical servers.
Remote Work and Flexible Workspace Policies
We support a remote work culture, reducing commuting and its associated emissions. Our team leverages digital collaboration tools to minimize the need for travel, supporting lower carbon emissions while maintaining efficiency and connectivity.
Eco-Friendly Procurement Practices
In selecting vendors and products, we prioritize those with demonstrated commitment to sustainable practices, such as energy efficiency and recyclable materials. By aligning with suppliers who share our environmental values, we ensure that our operational footprint aligns with our commitment to sustainability.
These green initiatives reflect our dedication to reducing environmental impact and helping our clients operate sustainably, advancing our commitment to a more environment-friendly world. | * |
| 45 | 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. | Currently, Cadence Solutions has not received any third-party-issued eco-labels, ratings, or certifications for the solutions included in our proposal. While we incorporate sustainable practices within our operations and in the delivery of our solutions, such as promoting cloud-based infrastructure to reduce physical resource consumption, we have not pursued specific eco-certifications to date. | * |

| 46 | 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? | Cadence Solutions offers a truly unique set of attributes that bring exceptional value to Sourcewell participating entities, setting us apart in an industry where our comprehensive approach is rarely seen. Unlike most companies that focus narrowly on one service area, we provide a full spectrum of support, including training, strategy, migrations, and implementations. This end-to-end service model ensures that Sourcewell members have a consistent and seamless experience throughout their entire digital transformation journey, from initial planning and AI readiness assessments to deployment and ongoing education. Our ability to provide such a comprehensive suite of services is a distinctive advantage, allowing clients to rely on a single trusted partner for all their needs.
Our commitment to vendor neutrality is another key differentiator. While many companies in the industry align themselves with specific technology providers and push their preferred solutions, we remain unbiased. Cadence Solutions does not favor any particular vendor; instead, we carefully evaluate the unique needs of each client to recommend and implement the solutions that will genuinely provide the greatest long-term value. This flexibility allows us to act in the best interest of our clients, ensuring they receive tailored, effective, and sustainable solutions without the influence of vendor-specific agendas.
As a Microsoft Content AI Partner, we have access to the latest advancements in digital transformation and AI technology. Our strategic relationship with Microsoft enables us to leverage cutting-edge tools like Microsoft Copilot and Microsoft Azure, creating solutions that are secure, scalable, and optimized for the complex requirements of public sector organizations. We use these technologies to deliver customized, high-impact solutions that address the unique challenges faced by Sourcewell participating entities. One of our standout offerings is our Copilot AI Readiness program. This program provides a structured, data-driven approach to evaluate an organization's preparedness for AI adoption, including data assessments, compliance checks, and strategic recommendations. Unlike one-size-fits-all approaches, our program is entirely customized, ensuring that every aspect of the AI strategy aligns with the client's goals and regulatory landscape.
Our company's foundation is rooted in a commitment to doing better for the public sector. Cadence Solutions was founded after our now CEO, had a poor experience with a public sector vendor that failed to meet expectations. This experience inspired our mission to prioritize customer goals and deliver high-quality outcomes, an ethos that continues to guide us today. Our dedication to client satisfaction, integrity, and service excellence is evident in every project we undertake. We understand the nuances of public sector operations, having worked extensively with existing Sourcewell participating entities, and we use that experience to deliver results that are both impactful and compliant with governmental standards.
Furthermore, we are committed to fostering long-term relationships with our clients. Our service doesn't stop at implementation. We offer ongoing support through flexible retainer and subscription models, ensuring that our clients can continue to manage, monitor, and optimize their AI and digital solutions as their needs evolve. This adaptability allows us to deliver sustained value, helping Sourcewell entities achieve continuous improvement and stay ahead of the curve in a rapidly changing technological landscape.
Cadence Solutions offers participating entities an unparalleled combination of comprehensive services, vendor neutrality, strategic partnerships, and a deep commitment to client success. Our holistic approach and advanced capabilities in AI and digital transformation equip us to meet the evolving needs of public sector organizations effectively. We stand ready to empower Sourcewell members with tailored, unbiased, and forward-thinking solutions that drive sustainable, impactful change. | * |

Table 5B: Value-Added Attributes

Line Item	Question	Certification	Offered	Comment
47	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.		○ Yes ◉ No	
48		Minority Business Enterprise (MBE)	○ Yes ◉ No	
49		Women Business Enterprise (WBE)	○ Yes ◉ No	
50		Disabled-Owned Business Enterprise (DOBE)	○ Yes ◉ No	
51		Veteran-Owned Business Enterprise (VBE)	○ Yes ◉ No	
52		Service-Disabled Veteran-Owned Business (SDVOB)	○ Yes ◉ No	
53		Small Business Enterprise (SBE)	○ Yes ◉ No	
54		Small Disadvantaged Business (SDB)	○ Yes ◉ No	
55		Women-Owned Small Business (WOSB)	○ Yes ◉ No	

Table 6: Pricing (400 Points)

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *	

56	Describe your payment terms and accepted payment methods.	At Cadence Solutions, we maintain flexible and client-centric payment terms to accommodate the diverse financial requirements of our clients. Our standard payment terms are set at net 30 days, ensuring a clear and efficient process that aligns with common business practices. However, we recognize that certain organizations, particularly some within the public sector, may require additional flexibility. For such clients, we may offer extended payment terms of net 45 days, allowing them additional time to process payments without disrupting project workflows or timelines. Our accepted payment methods reflect our commitment to making transactions as smooth and convenient as possible for our clients. We offer multiple options to suit a variety of organizational preferences, including the acceptance of cheques, wire transfers, and Electronic Funds Transfers (EFT). Each of these methods ensures secure and reliable payment processing, providing clients with the flexibility to select the payment type that best fits their internal procedures. For clients opting to pay by cheque, we ensure timely processing upon receipt, maintaining efficient records and communication to confirm payment status. Wire transfers offer a fast and secure method of payment, particularly for clients operating across international borders, enabling seamless transactions regardless of location. EFT is another widely used option that facilitates automated and electronic payments, streamlining the process for clients who prefer digital methods of financial management. By offering multiple payment methods and flexible terms, Cadence Solutions aims to create an accommodating and transparent financial relationship with our clients. This flexibility, coupled with our robust invoicing and payment tracking systems, ensures that all parties have a clear understanding of payment expectations, status, and timelines. Ultimately, our goal is to provide a frictionless financial process, allowing our clients to focus on their strategic initiatives and the successful implementation of our solutions.	*
57	Describe any leasing or financing options available for use by educational or governmental entities.	Currently we do not offer leasing or financing options for any of our clients, including educational or governmental entities. However, we remain committed to working closely with our clients to ensure that our pricing and payment terms are transparent, flexible, and accommodating to their financial needs. We are open to discussing customized payment schedules or terms on a case-by-case basis to support the financial planning and budgeting requirements of our clients in the public sector.	*
58	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.	At Cadence Solutions, we utilize three key transaction documents in connection with an awarded agreement: a Statement of Work (SOW), a Master Services Agreement (MSA), and a Non-Disclosure Agreement (NDA). Note that these documents would be changed to include mutually beneficial language to incorporate their procurement of Cadence Solutions services through the Sourcewell program. • The SOW outlines the specific project scope, deliverables, timelines, and pricing, ensuring that both parties have a clear understanding of the work to be performed. • The MSA governs the overall relationship between Cadence Solutions and the client, providing the general terms and conditions under which services will be provided. • The NDA protects the confidentiality of sensitive information shared between Cadence Solutions and the client, ensuring that proprietary information is kept secure. To accommodate different regulatory environments, we also use modified templates depending on the client's location. We have specific templates for clients located in the U.S. and Canada, ensuring compliance with regional legal and administrative requirements. While we primarily use our own documents, we are flexible in working with client-provided paperwork, should that be preferred and mutually agreeable. This adaptability helps us meet the unique needs of governmental and educational entities, while maintaining well-structured agreements that support successful project delivery. We have uploaded an example template for each of these documents; we have 2 different versions of each depending on whether the client is located in the US or Canada.	*

59	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?	Yes, we accept P-card procurement and payment for our training services. Clients can conveniently use P-cards through our website, making the process streamlined and efficient. We are pleased to offer this payment option with no additional cost to Sourcewell participating entities, ensuring that clients can easily manage their purchases without incurring extra fees. This method aligns with our commitment to providing flexible and hassle-free payment solutions.	*
60	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	Cadence Solutions offers a flexible pricing model with standard fixed-cost pricing as our primary approach, complemented by an hourly rate option to meet specific client needs and provide a clear-cut discounting structure defined in this RFP. This structure provides Sourcewell participating entities with a standardized predictable pricing model for most projects, while allowing for hourly billing when the project scope or requirements demand additional flexibility. This combination ensures clients can choose the structure that best suits their budget and project goals. Below, we provide detailed pricing data, including Sourcewell-specific discounts giving Sourcewell participating entities a transparent view of our offerings and associated costs. Artificial Intelligence (AI) Readiness Assessment Cadence Solutions uses a fixed-cost pricing model for our AI Readiness packages. These packages offer structured AI readiness assessment services at set price points, allowing Sourcewell participating entities to select the option that best fits their needs and budget. The fixed-cost structure provides transparency and predictability, ensuring clients understand the full cost upfront. 1. Small Entity Package • List Price: $29,500 (Fixed Cost) • Sourcewell List Price: $25,000 (Fixed Cost) o Discounted Savings: $4,500 (> 15% off of list price) • Ideal For: Small participating entities or departments that are beginning their AI journey and need a foundational readiness assessment to understand if AI is a suitable next step. • Features Included: o Initial Discovery and Needs Assessment: A focused session to identify the entity's goals, potential AI applications, and anticipated impact. o Data and Infrastructure Assessment: Evaluation of current data quality, accessibility, and the organization's IT infrastructure to determine if it can support AI technology. o Preliminary Compliance and Governance Review: Basic assessment of data governance and compliance frameworks to ensure any future AI initiatives can align with regulatory requirements. o Readiness Report and Recommendations: Delivery of a comprehensive readiness report, outlining the entity's current state and providing actionable recommendations for future AI adoption. o One-Time Consultation Session: A follow-up session with leaders to review findings and discuss the roadmap for potential AI implementation. 2. Midsize Entity Package • List Price: $59,000 (Fixed Cost) • Sourcewell List Price: $50,000 (Fixed Cost) o Discounted Savings: $9,000 (> 15% off list price) • Ideal For: Midsize participating entities with broader data and infrastructure needs, considering multiple applications of AI in various departments. • Features Included: o Comprehensive Discovery and Stakeholder Engagement: In-depth discussions with department heads to define AI goals, expected outcomes, and readiness across multiple areas. o Detailed Data and Infrastructure Assessment: A thorough evaluation of data quality, consistency, and availability, as well as an assessment of IT infrastructure and any integration needs. o Expanded Compliance and Governance Review: In-depth examination of the organization's data governance and compliance frameworks, with insights into regulatory requirements for future AI use. o Customized AI Readiness Report: A detailed report with department-specific recommendations, including readiness scores, areas for improvement, and suggested next steps for preparing for AI adoption. o Consultation and Roadmap Workshop: A session with key stakeholders to go through findings, answer questions, and provide a roadmap tailored to short- and long-term AI readiness goals.	

_____

3. Enterprise Entity Package
• List Price: $118,000 (Fixed Cost)
• Sourcewell List Price: $100,000 (Fixed Cost)
o Discounted Savings: $18,000 (> 15% off list price)
• Ideal For: Large participating entities with complex data needs, cross-departmental considerations, and the potential for enterprise-wide AI integration.
• Features Included:
o Organization-Wide Discovery and Goal Alignment: Strategic discussions with executive leaders and department heads to align on AI readiness objectives, operational goals, and potential barriers to AI adoption.
o Comprehensive Data, Infrastructure, and Integration Assessment: Extensive analysis of data quality and accessibility, IT infrastructure robustness, and the entity's ability to support scalable AI solutions across multiple departments.
o In-Depth Governance, Compliance, and Risk Assessment: A rigorous review of data governance policies, regulatory compliance, and risk management practices to identify gaps that could impact future AI use.
o Enterprise AI Readiness Report: A thorough, enterprise-level report detailing AI readiness scores for each department, infrastructure requirements, and a tailored set of recommendations to prepare for AI.
o Roadmap and Strategy Workshop: A series of workshops with key leaders and stakeholders to discuss readiness findings, prioritize actions, and develop a strategic roadmap for phased AI adoption, including guidance on budgeting, training, and compliance measures.

Artificial Intelligence (AI) Strategy and Roadmap Development
• List Price: $29,500 (Fixed Cost)
• Sourcewell List Price: $25,000 (Fixed Cost)
o Discounted Savings: $4,500 (> 15% off of list price)

The objective of this engagement is to develop a comprehensive Strategy and Roadmap, empowering clients to effectively leverage SharePoint Online and Microsoft Purview for optimizing, securing, and managing their documents and data in preparation for future AI integration. This strategic foundation ensures that clients have a robust information management framework in place, allowing them to adopt AI responsibly and effectively as their organization evolves.
Proposed Services:
1. Educational Demonstrations
o Conduct introductory sessions, "SharePoint 101" and "Purview 101," for key users, demonstrating features, performance insights, and best-practice configurations within these platforms to support informed usage and readiness for enhanced digital capabilities.
2. Workshops for Needs Assessment and Strategy Development
o Facilitate interactive workshops with key business users to gather requirements, understand operational needs, and provide insights on how SharePoint and Purview features can support clients' strategic objectives. These sessions allow Cadence Solutions to learn how the business operates while educating users on capabilities aligned with their goals. *
3. Tailored Strategy Playbook
o Develop a customized strategy playbook that includes:
  Information Architecture: Recommendations for structuring sites, document libraries, and folders for optimal document organization.
  Metadata Structure: Suggested tagging and metadata systems for efficient document classification and retrieval.
  Permissions and Security Model: A framework for securing documents and maintaining data protection standards.
  Policy and Governance Guidance: Recommendations for implementing governance policies that ensure compliance and data integrity.
  Retention and Compliance Recommendations: Strategies for document retention protocols and compliance considerations.
  Advanced Purview Features: Guidance on leveraging Data Loss Prevention (DLP), Sensitivity Labeling, and other features to enhance document security.
  Ongoing Management and Support: Recommendations for long-term management of Microsoft 365.
  Training & Change Management Planning: Identification of training and change management needs to support smooth adoption.
  Migration Options Analysis: Strategic insights on data migration

options into SharePoint Online.

4.   Roadmap Development

o   Create a detailed, actionable roadmap outlining a phased approach to implementing SharePoint Online across the organization. This roadmap will be customized based on clients' resources, priorities, and desired timelines.

5.   Draft Implementation Proposal

o   Provide a draft proposal detailing scope, estimated costs, and timeline should clients choose to engage Cadence Solutions for the full implementation of the roadmap.

6.   Final Presentation and Q&A

o   Host a closing presentation to deliver the strategy, roadmap, and recommendations, with a Q&A session to address any outstanding questions and ensure alignment among all stakeholders. This comprehensive Strategy and Roadmap will equip clients with a clear, structured plan to maximize SharePoint Online and Microsoft Purview capabilities, supporting effective information management, security, and compliance aligned with their operational goals.

Implementation and Support Services

•   List Price: $190 per hour
•   Sourcewell List Price: $160 per hour
•   Discounted Savings: (>15% off of list price)

We are committed to providing highly customized Implementation and Support Services that adapt to the unique needs and complexities of each client. Given that every organization has distinct requirements, such as specific configurations, system integrations, and data management strategies, a fixed cost estimate cannot adequately capture the individualized scope of each project. Instead of a rigid, one-size-fits-all price, we offer a reduced hourly rate for Sourcewell participating entities, lowering our standard implementation rate from $190 to $160 per hour. This adjusted rate enables us to maintain the high level of customization our clients expect while making services more accessible and cost-effective.

This flexible pricing model allows us to tailor our proposals based on a thorough assessment of each client's requirements, providing a transparent and adaptable structure that aligns with their budgetary and operational goals. Whether a project involves advanced security configurations, data migrations, or targeted user training, our reduced hourly rate ensures that clients receive competitive pricing for high-quality, personalized solutions. In addition to the hourly rate reduction, Sourcewell participating entities benefit from a consistent 15% discount across all services, guaranteeing that they receive exceptional value on every engagement.

By focusing on flexible hourly rates over fixed costs, Cadence Solutions offers Sourcewell members the advantage of a customizable, efficient pricing structure that scales to meet the demands of each project. This approach maintains transparency and enables us to deliver cost-effective, tailored support that aligns with the strategic goals of public sector organizations, allowing clients to achieve impactful outcomes while managing their budget effectively.

Training and Education

•   Current List Price (listed on our website): x
•   Sourcewell List Price: x price – 15%
o   Discounted Savings: (15% off of list price)

Through discount codes, Cadence Solutions is pleased to offer Sourcewell participating entities a 15% discount on our training services, based on the publicly viewable prices listed on our website. Our comprehensive training programs cover essential areas of data governance and compliance through Microsoft Purview and Microsoft 365 tools, equipping organizations with the foundational skills necessary to manage information effectively and securely. This foundation is valuable not only for immediate compliance and data management but also for setting the stage for future AI readiness within their organization.

The three primary training options include:

1.   Records Management Training

This course offers in-depth training on Microsoft Purview's records management capabilities, helping organizations build a structured approach to document retention and regulatory compliance. By mastering these functions, participants gain valuable insights into organizing and managing data at scale—a skill set that directly supports the structured data environments necessary for effective AI integration.

2. eDiscovery Training

Focused on content search, audit functions, and legal holds, this training provides participants with critical skills for managing sensitive information and ensuring compliance during legal inquiries. The ability to locate, protect, and analyze data within Microsoft 365 not only enhances compliance but also provides a secure framework for handling data, which is essential as organizations move towards data-driven AI applications.

3. Data Loss Prevention (DLP) Training

This course covers DLP tools within Microsoft Purview, helping participants learn to secure sensitive information and implement policies that prevent data breaches. By developing a robust approach to data security, participants help their organizations establish reliable data protection protocols. Such secure data environments are crucial for AI readiness, as they ensure data integrity and privacy are safeguarded in AI implementations.

Each course is designed to provide practical, actionable skills with live demonstrations and interactive exercises led by experienced trainers. With the 15% discount for Sourcewell members, these courses not only enable organizations to build compliance and data management capabilities but also lay the groundwork for future AI projects by establishing a controlled, compliant, and well-organized data landscape.

| 61 | 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. | For Sourcewell participating entities, we propose a minimum of 15% off list price.

Cadence Solutions fully understands and appreciates the importance of the Sourcewell program in delivering significant value and cost savings to its participating entities. As part of our commitment to supporting this initiative, we are proud to offer a substantial discount of (at minimum) 15% on our and services. We recognize that the Sourcewell program is designed to provide governmental, educational, and nonprofit organizations with access to high-quality solutions at competitive prices, and we are dedicated to aligning with that mission.

Our pricing proposal reflects this understanding by ensuring that Sourcewell participating entities receive exceptional value through our discounted pricing. The minimum 15% discount we offer is not just a reflection of our competitive rates, but also of our commitment to fostering long-term partnerships with Sourcewell members. This pricing strategy allows participating entities to access industry-leading solutions without the burden of excessive costs, helping them achieve their objectives in a cost-efficient manner.

By partnering with Sourcewell, we aim to deliver both superior service and meaningful cost savings, ensuring that participating entities can benefit from streamlined procurement processes and competitive pricing. | * |
| 62 | Describe any quantity or volume discounts or rebate programs that you offer. | We are pleased to offer a 10% discount if Sourcewell participating entities choose to engage in additional service lines available through our future offerings. This allows us to provide greater value across multiple areas of expertise, from digital transformation initiatives to long-term advisory services, supporting a holistic approach to each entity's strategic goals.
Cadence Solutions does not offer quantity or volume discounts for our AI Readiness assessment, as it is a one-time, highly customized activity tailored to each participating entity's specific requirements. Each assessment involves a detailed evaluation of infrastructure, data readiness, governance, and organizational needs, which makes an individualized approach rather than a volume-based model our ideal choice for both Sourcewell, its entities, and Cadence Solutions. | * |

| 63 | 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. | Cadence Solutions proposes a flexible and transparent method for facilitating "sourced" products or related services, commonly referred to as "open market" or "non-contracted" items. Our approach revolves around a tailored Quote-Based Model that is designed to provide the most accurate and fair pricing for each specific request, while also maintaining the flexibility needed to adapt to market fluctuations and unique client needs. This model ensures that Sourcewell participating entities receive cost-effective solutions, while still benefiting from our comprehensive service capabilities and commitment to delivering value. This method allows us to adjust and optimize our pricing structure based on real-time variables, ensuring that clients are charged fair and competitive rates. Our goal is to be as transparent as possible, providing clarity on how costs are determined and ensuring that no hidden fees or unexpected expenses arise. In situations where a cost-plus model may be more appropriate, Cadence Solutions can implement a structured markup system. For example, when specific procurement processes involve higher complexity or when items have variable availability, we may apply a fixed percentage markup to the base cost. This cost-plus approach is used judiciously to maintain a balance between covering operational expenses and offering cost-effective solutions to our clients. By using this hybrid model of quoting, we provide Sourcewell participating entities with flexible options that are adaptable to their budgetary constraints and project requirements. Moreover, our method of handling open market items is supported by our extensive network of strategic partnerships with industry leaders such as Microsoft, AvePoint, and OpenText. These relationships not only give us access to a wide range of resources but also enable us to procure items efficiently and potentially at lower costs, which we can pass on to our clients. Our clients benefit from a well-coordinated, efficient approach that ensures timely delivery and the best possible pricing. Cadence Solutions is also committed to flexibility and adaptability in meeting unique client needs. For large-scale or highly specialized requests, we will engage in direct consultations with Sourcewell members to understand their specific objectives and requirements. This consultative approach enables us to tailor our sourcing and quoting methods even further, ensuring that every aspect of the procurement process aligns with the client's strategic goals. We are prepared to work collaboratively with Sourcewell entities, using our expertise to find the best solutions while maintaining budgetary discipline. Our method for facilitating non-contracted items is designed to be both comprehensive and flexible. By leveraging a Quote-Based Approach, with the option for a cost-plus structure when needed, we ensure that Sourcewell participating entities receive transparent, competitive, and adaptable pricing. Our ability to navigate market complexities, combined with our strong partnerships and commitment to client satisfaction, ensures that we can provide reliable and efficient service for all open market requests. This approach reflects our dedication to delivering value while maintaining standards of excellence. | * |
| 64 | 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. | The total cost of acquisition has been fully outlined in the pricing submitted with our response. There are no additional charges associated with the purchase, such as installation, setup, mandatory training, or initial analysis. All costs have been accounted for in the provided pricing structure, ensuring full transparency and no hidden fees for Sourcewell participating entities. This approach reflects our commitment to providing a straightforward and predictable cost structure for all our clients. | * |

| 65 | Describe any unique distribution and/or delivery methods or options offered in your proposal. | Cadence Solutions offers a highly flexible approach to service delivery, providing our clients with options that best suit their needs and preferences. The default method we employ for delivering services is remote, which allows us to efficiently support our clients without the need for onsite presence. This remote delivery model is not only practical but also cost-effective, as it eliminates the need for travel-related expenses such as airfare, lodging, and per diem costs. By utilizing remote delivery, we are able to pass those savings directly to our clients, ensuring they receive high-quality services at a lower overall cost. This approach aligns with our commitment to offering value-driven solutions without compromising on service quality or outcomes.

Despite the advantages of remote delivery, we understand that some clients may prefer or require onsite support for certain phases of their project. In these cases, we are more than willing to accommodate this request. We work closely with our clients to arrange onsite visits when necessary, ensuring that our team can provide direct, face-to-face support where it adds the most value. Onsite visits are most requested during the training phase of a project, some clients find that in-person engagement and hands-on demonstrations can be particularly beneficial for learning and adoption. While this is not a frequent request, we are fully prepared to facilitate onsite support whenever it is deemed necessary or preferable by the client.

For any onsite engagements, we coordinate travel and logistics in alignment with the client's requirements, and we are transparent about how these additional costs will be managed. Although onsite travel does involve additional costs, we ensure that these expenses are clearly communicated upfront, and they are only incurred when explicitly requested by the client. Our approach ensures that clients have full control over how they engage with us and can choose the service delivery method that best aligns with their budget and operational needs.

Ultimately, whether our services are delivered remotely or onsite, Cadence Solutions is dedicated to providing the highest level of flexibility, transparency, and client satisfaction. We strive to meet the unique preferences of each client while maintaining cost efficiency and ensuring successful project outcomes. | * |
| 66 | 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. | Cadence Solutions is committed to maintaining rigorous compliance with all contract terms and requirements outlined by Sourcewell. To verify ongoing adherence to the proposed agreement, we will implement the following structured self-audit program:

Quarterly Compliance Reviews: Every quarter, Cadence Solutions will conduct a comprehensive internal audit of our performance and service delivery aligned with Sourcewell's standards. This review will focus on pricing compliance, adherence to service levels, reporting accuracy, and customer satisfaction and be executed under the supervision of our CFO.

Documentation and Traceability: We maintain detailed records for all services provided to Sourcewell Participating Entities, including pricing documentation, support logs, and client communications. This allows for full traceability and accountability in all transactions, enabling effective audit trails this will also be monitored by our CFO with assistance from our VP of Business Solutions.

Data Security and Privacy Audits: Given the sensitivity of AI services, we conduct regular data security and privacy audits, verifying compliance with data protection requirements and responsible AI practices as defined by Sourcewell. This activity will be under the guidance of our VP of Business Solutions. | * |

| 67 | 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. | Internal Metrics for Measuring Success with Sourcewell Agreement
If awarded the Sourcewell agreement, Cadence Solutions will track a series of key internal metrics to ensure alignment with Sourcewell's goals and to monitor the success of our services across Participating Entities. These metrics will include:
• Customer Satisfaction Score (CSAT): We will actively survey Participating Entities to capture satisfaction levels related to our AI readiness and support services. CSAT scores will be reviewed quarterly to ensure a high level of client satisfaction and identify areas for continuous improvement.
• Service Level Agreement (SLA) Compliance Rate: Tracking our adherence to SLAs—including response times, issue resolution, and service quality—is critical to maintaining high standards. Aiming for a 98% or higher compliance rate, we will use this metric to ensure that all services provided align with the expectations set forth in the agreement.
• Project Delivery Accuracy: Rather than simply tracking turnaround time, we emphasize on-time delivery accuracy to ensure projects meet agreed timelines and milestones. This metric assesses our ability to deliver services precisely as scheduled, accounting for specific client needs and contract timelines. Regular analysis of delivery accuracy will allow us to optimize resource planning, swiftly address potential delays, and uphold our commitment to consistent, reliable service.
• Adoption and Utilization Rates: We will track the adoption rates of AI services and the extent of their use among Participating Entities. High adoption and usage metrics will indicate the success of our training and support, and we will work closely with low-engagement clients to enhance utilization.
• Compliance Audit Pass Rate: As part of our self-audit program, we track the percentage of compliance audits passed without exception. Our goal is a 100% pass rate, demonstrating our commitment to Sourcewell's contract requirements.
• Expansion of Participating Entities Served: Tracking the number of new Participating Entities utilizing our services and any growth in engagement across sectors will help us assess the success of our outreach and marketing efforts under the agreement.
These metrics will allow us to maintain transparency and accountability while proactively identifying areas for improvement, ensuring successful outcomes for Participating Entities | * |
| 68 | 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. | Cadence Solutions is proposing a tiered, accelerated Administrative Fee structure payable to Sourcewell in consideration for the support and services provided under this Master Agreement. Our proposed structure is designed to align with our projected sales growth while ensuring Sourcewell receives fair compensation for facilitating the cooperative purchasing process.
For the first $1,000,000 in cumulative sales within a calendar year, we propose a fee of 2% of all completed transactions, payable to Sourcewell. For any sales exceeding the $1,000,000 threshold in the same calendar year, we propose an increased fee of 2.5% on all additional sales beyond that initial amount.
For example:
• If Cadence achieves $4,000,000 in sales in the year 2025:
o The first $1,000,000 of 2025 sales would incur a 2% Administration Fee payable to Sourcewell:
$1,000,000 * 0.020 = $20,000
o The remaining $3,000,000 of 2025 sales would incur a 2.5% Administration Fee payable to Sourcewell:
$3,000,000 * 0.025 = $75,000
This results in a total Administrative payment of $95,000 from cadence to Sourcewell for the year. This tiered fee structure offers a balanced approach, ensuring that Sourcewell is appropriately compensated for the services provided while supporting long-term, sustainable growth for both Cadence, and Sourcewell's participating entities. | * |

Table 7: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
69	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	The pricing Cadence Solutions offers to Sourcewell participating entities is designed to deliver

substantial value. A discount exceeding 15% for Sourcewell participating entities, along with a 2.0%-2.5% administrative fee paid to Sourcewell, is exceptionally competitive compared to existing cooperative contracts, state contracts, and agencies. We recognize that, given the vast potential and purchasing volume associated with the Sourcewell vendor list, this structure is not only highly advantageous for entities but also fair and balanced for all parties involved. We aim to ensure that Sourcewell is the logical and obvious choice for participating entities when it comes to procuring AI Readiness, Implementation, and Support Services.

This superior discounted pricing is made possible through the exceptional purchasing power and streamlined procurement processes facilitated by Sourcewell, which allows us to extend a significant 15% (or greater) discount across our service offerings.

The considerable buying power that Sourcewell holds plays a vital role in enabling us to pass on these substantial savings to public sector organizations. With Sourcewell's extensive reach, we can leverage economies of scale, which translates to lower costs for our clients without sacrificing service quality or scope. Additionally, Sourcewell's reputation and scale streamline the procurement process, reducing the administrative costs and complexities that often accompany traditional purchasing methods. This efficiency enables us to maintain a pricing structure that is not only competitive but also fully transparent, allowing Sourcewell participating entities to make budget-conscious decisions with clear expectations and no hidden fees.

Further enhancing the value of our Sourcewell pricing is our flexibility in service delivery and contract terms, which ensures that clients only pay for the specific services they need. By offering options for remote or onsite delivery based on client preference, we can help organizations manage their budgets effectively. Moreover, this flexibility is a key advantage for public

sector clients who may face varying budget cycles or procurement requirements, as it allows for cost-effective customization that is not commonly found in standard contracts.

Cadence Solutions also understands the unique fiscal constraints and operational challenges of public sector organizations, particularly those in government, education, and nonprofit sectors. The Sourcewell program enables us to align our pricing closely with these specific needs, making it easier for clients to access the comprehensive services they require within their budgetary limits. By reducing procurement barriers and simplifying contract administration, we create an accessible, value-driven approach that maximizes the cost savings Sourcewell's cooperative purchasing model provides.

Enhanced by the program's buying power, our pricing model through Sourcewell is purposefully crafted to deliver substantial savings, efficient processes, and tailored service options. This results in better-than-market rates compared to other cooperative or state contracts, ensuring that Sourcewell participating entities can access high-quality services at an exceptional value. Through the partnership, we would be committed to supporting the financial and operational goals of public sector organizations, allowing them to achieve their objectives within a streamlined, cost-effective procurement framework.

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

Line Item	Question	Response *
70	Provide a detailed description of all Solutions offered in your proposal.	Cadence Solutions offers a flexible pricing model with standard fixed-cost pricing as our primary approach, complemented by an hourly rate option to meet specific client needs and provide a clear-cut discounting structure defined in this RFP. This structure provides Sourcewell participating entities with a standardized predictable pricing model for most projects, while allowing for hourly billing when the project scope or requirements demand additional flexibility. This combination ensures clients can choose the structure that best suits their budget and project goals. Below, we provide detailed pricing data, including Sourcewell-specific discounts giving Sourcewell participating entities a transparent view of our offerings and associated costs. Artificial Intelligence (AI) Readiness Assessment 1. Small Entity Package •　　Ideal For: Small participating entities or departments that are beginning their AI journey and need a foundational readiness assessment to understand if AI is a

suitable next step.
• Features Included:
o Initial Discovery and Needs Assessment: A focused session to identify the entity's goals, potential AI applications, and anticipated impact.
o Data and Infrastructure Assessment: Evaluation of current data quality, accessibility, and the organization's IT infrastructure to determine if it can support AI technology.
o Preliminary Compliance and Governance Review: Basic assessment of data governance and compliance frameworks to ensure any future AI initiatives can align with regulatory requirements.
o Readiness Report and Recommendations: Delivery of a comprehensive readiness report, outlining the entity's current state and providing actionable recommendations for future AI adoption.
o One-Time Consultation Session: A follow-up session with leaders to review findings and discuss the roadmap for potential AI implementation.
_____

2. Midsize Entity Package
• Ideal For: Midsize participating entities with broader data and infrastructure needs, considering multiple applications of AI in various departments.
• Features Included:
o Comprehensive Discovery and Stakeholder Engagement: In-depth discussions with department heads to define AI goals, expected outcomes, and readiness across multiple areas.
o Detailed Data and Infrastructure Assessment: A thorough evaluation of data quality, consistency, and availability, as well as an assessment of IT infrastructure and any integration needs.
o Expanded Compliance and Governance Review: In-depth examination of the organization's data governance and compliance frameworks, with insights into regulatory requirements for future AI use.
o Customized AI Readiness Report: A detailed report with department-specific recommendations, including readiness scores, areas for improvement, and suggested next steps for preparing for AI adoption.
o Consultation and Roadmap Workshop: A session with key stakeholders to go through findings, answer questions, and provide a roadmap tailored to short- and long-term AI readiness goals.
_____

3. Enterprise Entity Package
• Ideal For: Large participating entities with complex data needs, cross-departmental considerations, and the potential for enterprise-wide AI integration.
• Features Included:
o Organization-Wide Discovery and Goal Alignment: Strategic discussions with executive leaders and department heads to align on AI readiness objectives, operational goals, and potential barriers to AI adoption.
o Comprehensive Data, Infrastructure, and Integration Assessment: Extensive analysis of data quality and accessibility, IT infrastructure robustness, and the entity's ability to support scalable AI solutions across multiple departments.
o In-Depth Governance, Compliance, and Risk Assessment: A rigorous review of data governance policies, regulatory compliance, and risk management practices to identify gaps that could impact future AI use.
o Enterprise AI Readiness Report: A thorough, enterprise-level report detailing AI readiness scores for each department, infrastructure requirements, and a tailored set of recommendations to prepare for AI.
o Roadmap and Strategy Workshop: A series of workshops with key leaders and stakeholders to discuss readiness findings, prioritize actions, and develop a strategic roadmap for phased AI adoption, including guidance on budgeting, training, and compliance measures.

Artificial Intelligence (AI) Strategy and Roadmap Development

The objective of this engagement is to develop a comprehensive Strategy and Roadmap, empowering clients to effectively leverage SharePoint Online and Microsoft Purview for optimizing, securing, and managing their documents and data in preparation for future AI integration. This strategic foundation ensures that clients have a robust information management framework in place, allowing them to adopt AI responsibly and effectively as their organization evolves.
Proposed Services:
• Educational Demonstrations
o Conduct introductory sessions, "SharePoint 101" and "Purview 101," for key users, demonstrating features, performance insights, and best-practice configurations within these platforms to support informed usage and readiness for enhanced digital capabilities.
• Workshops for Needs Assessment and Strategy Development
o Facilitate interactive workshops with key business users to gather requirements, understand operational needs, and provide insights on how SharePoint and Purview features can support clients' strategic objectives. These sessions allow Cadence Solutions to learn how the business operates while educating users on capabilities

aligned with their goals.
- Tailored Strategy Playbook
o Develop a customized strategy playbook that includes:
  Information Architecture: Recommendations for structuring sites, document libraries, and folders for optimal document organization.
  Metadata Structure: Suggested tagging and metadata systems for efficient document classification and retrieval.
  Permissions and Security Model: A framework for securing documents and maintaining data protection standards.
  Policy and Governance Guidance: Recommendations for implementing governance policies that ensure compliance and data integrity.
  Retention and Compliance Recommendations: Strategies for document retention protocols and compliance considerations.
  Advanced Purview Features: Guidance on leveraging Data Loss Prevention (DLP), Sensitivity Labeling, and other features to enhance document security.
  Ongoing Management and Support: Recommendations for long-term management of Microsoft 365.
  Training & Change Management Planning: Identification of training and change management needs to support smooth adoption.
  Migration Options Analysis: Strategic insights on data migration options into SharePoint Online.
- Roadmap Development
o Create a detailed, actionable roadmap outlining a phased approach to implementing SharePoint Online across the organization. This roadmap will be customized based on clients' resources, priorities, and desired timelines.
- Draft Implementation Proposal
o Provide a draft proposal detailing scope, estimated costs, and timeline should clients choose to engage Cadence Solutions for the full implementation of the roadmap.
- Final Presentation and Q&A
o Host a closing presentation to deliver the strategy, roadmap, and recommendations, with a Q&A session to address any outstanding questions and ensure alignment among all stakeholders.
This comprehensive Strategy and Roadmap will equip clients with a clear, structured plan to maximize SharePoint Online and Microsoft Purview capabilities, supporting effective information management, security, and compliance aligned with their operational goals.

Implementation and Support Services
Cadence Solutions' Six-Stage Project Implementation and Support Services offer a structured yet adaptable approach, designed to guide clients through a successful transition to SharePoint Online and Microsoft Purview, with an eye toward future AI integration. Drawing on extensive experience with organizations of similar size and complexity, we recognize the need for a flexible, agile process that accommodates each client's unique operational demands. Our approach is rooted in three core principles: leading transitions responsively to support ongoing operations, embedding industry-leading practices that ensure sustainable change, and fostering collaboration to engage users throughout the process. By establishing a robust information management framework, our six-stage plan not only meets today's goals but also prepares clients for the advanced capabilities of AI, setting them up for a secure, compliant, and future-ready environment.
Stage 1: Plan
In the planning phase, we focus on defining the project's scope, timeline, and objectives in collaboration with key stakeholders. We finalize the project schedule, identify necessary resources, and establish project management tools to ensure smooth progression. Our approach emphasizes open communication and collaboration from day one, setting a clear foundation for the project. By the end of this phase, the team has a comprehensive understanding of the project structure and is fully aligned with timelines and processes.
Stage 2: Design
In this stage, we assess the client's current environment and gather requirements through interactive workshops with key business users. These workshops help us to design a SharePoint Online environment tailored to meet specific organizational needs. We develop technical and business specifications that outline how SharePoint Online and Microsoft Purview will address identified gaps. This stage ensures that all design elements align with the client's operational requirements and long-term goals.
Stage 3: Build
During the build phase, our team configures the SharePoint Online environment based on the specifications developed in the design phase. Weekly demos allow stakeholders to provide feedback, ensuring that adjustments can be made as necessary. Concurrently, clients are encouraged to prepare their data for migration. By the end of this stage, a test-ready SharePoint environment is complete, ready for validation in the next phase.
Stage 4: Test
In the testing phase, Cadence Solutions facilitates User Acceptance Testing (UAT) with a select group of users. We guide users through the testing process and gather

feedback to identify any issues that require remediation. Testing includes an initial data migration of 5% to validate the setup. We complete multiple cycles of testing and corrections to ensure a smooth transition, culminating in final approval from users that the environment meets their needs.

Stage 5: Train
We conduct training sessions tailored to the needs of users and administrators, equipping them to effectively use SharePoint Online and the configurations made. Training materials are customized and may include options such as administrator training, end-user support, and specialized coaching. Simultaneously, we prepare the production environment and execute the full migration of data. This phase ensures that all users are confident and proficient in the new system.

Stage 6: Launch
The final stage is the go-live phase, where we provide 20 business days of post-launch support. During this period, clients can raise support tickets for any issues that arise. Our team ensures knowledge transfer to the client's IT department, enabling them to manage ongoing support independently. This phase includes final sign-off and handover, marking the successful completion of the project.

Through this six-stage approach, Cadence Solutions provides clients with a structured, responsive project plan that is agile enough to adapt to evolving needs, ensuring a seamless and effective transition to SharePoint Online.

Training and Education
Through discount codes, Cadence Solutions is pleased to offer Sourcewell participating entities a 15% discount on our training services, based on the publicly viewable prices listed on our website. Our comprehensive training programs cover essential areas of data governance and compliance through Microsoft Purview and Microsoft 365 tools, equipping organizations with the foundational skills necessary to manage information effectively and securely. This foundation is valuable not only for immediate compliance and data management but also for setting the stage for future AI readiness within their organization.

The three primary training options include:
1.   Records Management Training
This course offers in-depth training on Microsoft Purview's records management capabilities, helping organizations build a structured approach to document retention and regulatory compliance. By mastering these functions, participants gain valuable insights into organizing and managing data at scale—a skill set that directly supports the structured data environments necessary for effective AI integration.
2.   eDiscovery Training
Focused on content search, audit functions, and legal holds, this training provides participants with critical skills for managing sensitive information and ensuring compliance during legal inquiries. The ability to locate, protect, and analyze data within Microsoft 365 not only enhances compliance but also provides a secure framework for handling data, which is essential as organizations move towards data-driven AI applications.
3.   Data Loss Prevention (DLP) Training
This course covers DLP tools within Microsoft Purview, helping participants learn to secure sensitive information and implement policies that prevent data breaches. By developing a robust approach to data security, participants help their organizations establish reliable data protection protocols. Such secure data environments are crucial for AI readiness, as they ensure data integrity and privacy are safeguarded in AI implementations.

Each course is designed to provide practical, actionable skills with live demonstrations and interactive exercises led by experienced trainers. With the 15% discount for Sourcewell members, these courses not only enable organizations to build compliance and data management capabilities but also lay the groundwork for future AI projects by establishing a controlled, compliant, and well-organized data landscape.

| 71 | Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services. | 1.   AI Readiness and Assessment Services
o   Small Entity Package
o   Mid-Size Entity Package
o   Enterprise Entity Package | * |

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	Subcategory	Offered *	Comments
72	ARTIFICIAL INTELLIGENCE (AI) READINESS ASSESSMENTS Describe how you evaluate an organization's current AI		⦿ Yes ○ No	To evaluate an organization's current AI readiness and identify areas for improvement, Cadence Solutions employs a comprehensive assessment framework through Copilot AI Readiness. This evaluation process is designed to assess critical factors that impact AI

readiness and identify areas for improvement.

Provide examples of successful AI readiness assessments you have conducted for other public entities.

adoption and success, including technology infrastructure, data maturity, organizational culture, and compliance needs. Here's how Cadence Solutions approaches this evaluation:

1. Infrastructure and Technology Assessment

Objective: To determine if the organization's current technology environment can support AI initiatives.

Method: We conduct a full audit of IT infrastructure, analyzing hardware, software, and network capacities. This includes examining cloud-readiness, computing power, and compatibility with AI models.

Outcome: We identify infrastructure gaps that may hinder AI deployment, such as outdated systems or insufficient processing power, and recommend upgrades to ensure scalability.

2. Data Maturity and Quality Analysis

Objective: To assess the organization's data handling practices, quality, and structure, which are critical for training accurate AI models.

Method: Our team examines data collection processes, data governance, and data quality standards. We also evaluate data availability and accessibility across departments.

Outcome: This assessment pinpoints areas for improvement in data governance, integration, and security. We provide recommendations for data cleaning, labeling, and standardization to make data AI-ready.

3. Organizational Culture and Change Readiness

Objective: To understand the organization's cultural readiness for AI, including leadership alignment and staff adaptability.

Method: Through interviews, surveys, and workshops, we gather insights from stakeholders to assess attitudes towards AI, perceived risks, and openness to change.

Outcome: We identify cultural and skill-related gaps and create a targeted change management plan to build organizational support, addressing potential resistance and preparing teams for an AI-driven environment.

4. AI Governance and Ethical Compliance

Objective: To evaluate the organization's existing policies on data privacy, ethical standards, and regulatory compliance, which are essential for responsible AI use.

Method: We review current policies, compliance with data protection regulations, and ethical standards in AI use. Our team also assesses any existing AI governance framework and policies.

Outcome: We provide guidance on building or strengthening responsible AI governance, covering areas like bias mitigation, transparency, and compliance with regulatory standards.

5. Use Case and Value Potential Analysis

Objective: To identify high-impact areas where AI can provide the most value and align with the organization's goals.

Method: Cadence collaborates with departments to identify specific operational challenges and processes that could benefit from AI. We analyze each potential use case for feasibility and expected ROI.

Outcome: We deliver prioritized use cases that offer immediate value and align with strategic goals, creating a clear focus for AI initiatives and helping avoid unnecessary investment in low-impact areas.

6. Skill and Capability Assessment

Objective: To assess internal AI skill levels and identify training needs for effective AI adoption.

Method: We evaluate the technical capabilities of IT and data teams, as well as end-users who will interact with AI solutions. This assessment includes reviewing skills in data handling, model management, and interpreting AI-driven insights.

Outcome: Cadence identifies specific training needs and proposes targeted educational programs to close skill gaps, fostering a culture of AI proficiency within the organization.

Summary and AI Readiness Report

Upon completing the assessment, Cadence Solutions

provides a detailed AI Readiness Report that outlines the organization's current state, identifies areas for improvement, and recommends a tailored roadmap for AI adoption. This report includes a timeline and prioritized steps, ensuring that Participating Entities have a clear path to successfully deploying AI technologies. This comprehensive approach enables Cadence Solutions to pinpoint key challenges and provide actionable steps for improvement, ensuring that organizations are well-prepared for AI integration and long-term success.

Cadence Solutions has extensive experience conducting AI readiness assessments for public entities, ensuring they are well-prepared to adopt and benefit from AI technology. Below are two successful examples: the Canadian Forces and the Association of Professional Engineers and Geoscientists of Alberta (APEGA).

1. Canadian Forces – AI Readiness for Operational Efficiency
Cadence Solutions partnered with the Canadian Forces to evaluate their AI readiness for operational efficiency, particularly in the areas of logistics and predictive maintenance. This assessment aimed to determine how AI could enhance decision-making and support predictive maintenance for equipment to reduce operational downtime.

•   Infrastructure and Data Assessment: Cadence assessed the Canadian Forces' existing IT infrastructure, data storage, and processing capabilities. We identified gaps in data standardization and storage that could hinder the effective use of AI, recommending upgrades to infrastructure and data handling practices to meet AI processing requirements.

•   Data Quality and Maturity: The data maturity assessment revealed significant opportunities to improve data consistency and accessibility across units. We provided recommendations for centralized data governance and established protocols for data tagging and quality controls.

•   Cultural and Skills Readiness: Recognizing the unique operational demands of the Canadian Forces, Cadence evaluated the cultural readiness of key personnel and their openness to AI-driven operational changes. Through workshops and training programs, we helped build AI literacy and fostered a culture receptive to data-driven decision-making.

•   Outcome: Following our assessment, the Canadian Forces adopted an incremental AI strategy, starting with pilot projects in logistics and maintenance. The organization has since seen improved predictive maintenance capabilities, reducing equipment downtime and optimizing resource allocation. This assessment provided a solid foundation for future AI expansion across other operational areas.

2. Association of Professional Engineers and Geoscientists of Alberta (APEGA) – AI Readiness for Enhanced Member Services and Compliance Management
APEGA sought to leverage AI to streamline member services and compliance management processes. Cadence Solutions conducted an AI readiness assessment focused on enhancing APEGA's operational efficiency while maintaining strict adherence to regulatory standards.

•   Technology and Infrastructure Analysis: Cadence assessed APEGA's digital systems to determine their suitability for AI applications, identifying areas where infrastructure enhancements were required for scalable AI integration. Our recommendations included adopting cloud-based solutions to support AI processing and scalability needs.

•   Data Governance and Privacy: Given APEGA's role as a regulatory body, data privacy and compliance were critical. Cadence evaluated APEGA's data governance

			framework to ensure AI solutions could be implemented without compromising sensitive member data. We advised on best practices for secure data storage, anonymization, and regulatory compliance. • Use Case Identification and Prioritization: We worked closely with APEGA to identify AI use cases that aligned with their mission, such as improving member engagement through personalized service recommendations and automating compliance checks. Each use case was assessed for feasibility and potential impact, resulting in a prioritized roadmap for AI adoption. • Outcome: The readiness assessment enabled APEGA to initiate AI-driven enhancements in member services and compliance management. By automating compliance processes, APEGA improved response times and accuracy in regulatory checks, enabling more efficient resource allocation. The organization is now well-positioned to scale its AI capabilities to further enhance member experiences. Summary These successful AI readiness assessments demonstrate Cadence Solutions' commitment to helping public entities leverage AI responsibly and effectively. Our approach ensures a thorough evaluation of each organization's infrastructure, data management, cultural readiness, and compliance needs, empowering them to make informed, strategic decisions on AI adoption.	

73	AI STRATEGY AND ROADMAP DEVELOPMENT
	
	Describe your approach to developing a comprehensive AI strategy and roadmap tailored to the unique needs of public entities.
	
	Describe how you ensure the AI strategy aligns with the entity's goals and objectives.
			⊙ Yes
			○ No
				The objective of this engagement is to develop a comprehensive Strategy and Roadmap, empowering clients to effectively leverage SharePoint Online and Microsoft Purview for optimizing, securing, and managing their documents and data in preparation for future AI integration. This strategic foundation ensures that clients have a robust information management framework in place, allowing them to adopt AI responsibly and effectively as their organization evolves.
				Proposed Services:
				• Educational Demonstrations
				o Conduct introductory sessions, "SharePoint 101" and "Purview 101," for key users, demonstrating features, performance insights, and best-practice configurations within these platforms to support informed usage and readiness for enhanced digital capabilities.
				• Workshops for Needs Assessment and Strategy Development
				o Facilitate interactive workshops with key business users to gather requirements, understand operational needs, and provide insights on how SharePoint and Purview features can support clients' strategic objectives. These sessions allow Cadence Solutions to learn how the business operates while educating users on capabilities aligned with their goals.
				• Tailored Strategy Playbook
				o Develop a customized strategy playbook that includes:
				  Information Architecture: Recommendations for structuring sites, document libraries, and folders for optimal document organization.
				  Metadata Structure: Suggested tagging and metadata systems for efficient document classification and retrieval.
				  Permissions and Security Model: A framework for securing documents and maintaining data protection standards.
				  Policy and Governance Guidance: Recommendations for implementing governance policies that ensure compliance and data integrity.
				  Retention and Compliance Recommendations: Strategies for document retention protocols and compliance considerations.
				  Advanced Purview Features: Guidance on leveraging Data Loss Prevention (DLP), Sensitivity Labeling, and other features to enhance document security.
				• Ongoing Management and Support:
					*

			Recommendations for long-term management of Microsoft 365.
			Training & Change Management Planning: Identification of training and change management needs to support smooth adoption.
			Migration Options Analysis: Strategic insights on data migration options into SharePoint Online.
			• Roadmap Development
			o Create a detailed, actionable roadmap outlining a phased approach to implementing SharePoint Online across the organization. This roadmap will be customized based on clients' resources, priorities, and desired timelines.
			• Draft Implementation Proposal
			o Provide a draft proposal detailing scope, estimated costs, and timeline should clients choose to engage Cadence Solutions for the full implementation of the roadmap.
			• Final Presentation and Q&A
			o Host a closing presentation to deliver the strategy, roadmap, and recommendations, with a Q&A session to address any outstanding questions and ensure alignment among all stakeholders.
			This comprehensive Strategy and Roadmap will equip clients with a clear, structured plan to maximize SharePoint Online and Microsoft Purview capabilities, supporting effective information management, security, and compliance aligned with their operational goals and objectives.
74	RESPONSIBLE AI POLICY DEVELOPMENT Describe how your organization addresses ethical concerns related to AI, such as bias, fairness, and transparency. Provide one (1) example of how these considerations have been integrated into your AI solutions for your clients.		○ Yes ⦿ No	n/a
75	IMPLEMENTATION AND SUPPORT SERVICES		⦿ Yes ○ No	Cadence Solutions' Six-Stage Project Implementation and Support Services offer a structured yet adaptable approach, designed to guide clients through a successful transition to SharePoint Online and Microsoft Purview, with an eye toward future AI integration. Drawing on extensive experience with organizations of similar size and complexity, we recognize the need for a flexible, agile process that accommodates each client's unique operational demands. Our approach is rooted in three core principles: leading transitions responsively to support ongoing operations, embedding industry-leading practices that ensure sustainable change, and fostering collaboration to engage users throughout the process. By establishing a robust information management framework, our six-stage plan not only meets today's goals but also prepares clients for the advanced capabilities of AI, setting them up for a secure, compliant, and future-ready environment. Stage 1: Plan In the planning phase, we focus on defining the project's scope, timeline, and objectives in collaboration with key stakeholders. We finalize the project schedule, identify necessary resources, and establish project management tools to ensure smooth progression. Our approach emphasizes open communication and collaboration from day one, setting a clear foundation for the project. By the end of this phase, the team has a comprehensive understanding of the project structure and is fully aligned with timelines and processes. Stage 2: Design In this stage, we assess the client's current environment and gather requirements through interactive workshops with key business users. These workshops help us to design a SharePoint Online environment tailored to meet specific organizational needs. We develop technical and

business specifications that outline how SharePoint Online and Microsoft Purview will address identified gaps. This stage ensures that all design elements align with the client's operational requirements and long-term goals.

Stage 3: Build

During the build phase, our team configures the SharePoint Online environment based on the specifications developed in the design phase. Weekly demos allow stakeholders to provide feedback, ensuring that adjustments can be made as necessary. Concurrently, clients are encouraged to prepare their data for migration. By the end of this stage, a test-ready SharePoint environment is complete, ready for validation in the next phase.

Stage 4: Test

In the testing phase, Cadence Solutions facilitates User Acceptance Testing (UAT) with a select group of users. We guide users through the testing process and gather feedback to identify any issues that require remediation. Testing includes an initial data migration of 5% to validate the setup. We complete multiple cycles of testing and corrections to ensure a smooth transition, culminating in final approval from users that the environment meets their needs.

Stage 5: Train

We conduct training sessions tailored to the needs of users and administrators, equipping them to effectively use SharePoint Online and the configurations made. Training materials are customized and may include options such as administrator training, end-user support, and specialized coaching. Simultaneously, we prepare the production environment and execute the full migration of data. This phase ensures that all users are confident and proficient in the new system.

Stage 6: Launch

The final stage is the go-live phase, where we provide 20 business days of post-launch support. During this period, clients can raise support tickets for any issues that arise. Our team ensures knowledge transfer to the client's IT department, enabling them to manage ongoing support independently. This phase includes final sign-off and handover, marking the successful completion of the project.

Through this six-stage approach, Cadence Solutions provides clients with a structured, responsive project plan that is agile enough to adapt to evolving needs, ensuring a seamless and effective transition to SharePoint Online.

| 76 | | INFRASTRUCTURE AND TECHNOLOGY RECOMMENDATIONS

Describe the infrastructure and technology recommendations you provide to support AI implementation.

Describe how you ensure that your AI solutions integrate seamlessly with existing IT systems and databases. | ⦿ Yes
○ No | At Cadence Solutions, our Copilot AI Readiness framework guides our clients through the infrastructure and technology choices needed for successful AI implementation. Leveraging our Microsoft Content AI Partnership and Risk Compliance and Advisory Partner Program experience, we prioritize scalable, secure, and compliant AI environments that integrate smoothly with existing IT systems.
Our infrastructure recommendations often include cloud-based platforms, particularly within Microsoft Azure, to provide scalability, advanced data security, and high availability. By utilizing Azure's capabilities, we ensure that our clients can run complex AI models with optimal performance, maintain data integrity, and meet stringent compliance standards. To support regulatory requirements, we recommend Microsoft Purview as a foundation for data governance, allowing clients to manage sensitive information securely while enabling AI-driven insights.
To further enhance AI processing and insight generation, we integrate Microsoft Power BI and Synapse Analytics within our Copilot framework. These tools work seamlessly with Microsoft 365, facilitating data access, visualization, and analysis while ensuring compliance and alignment with clients' unique governance needs.
Ensuring Seamless Integration with Existing IT Systems and Databases
Through Copilot, we emphasize the importance of embedding AI within the client's current IT landscape for minimal disruption. Leveraging tools from our Microsoft Content AI Partnership, we use Microsoft Graph API and SharePoint Syntex to create smooth, secure integrations between AI solutions and existing systems, including SharePoint and Teams. This approach bridges data sources across platforms, ensuring AI insights are accessible within familiar tools, enhancing both usability and adoption.
Before deployment, our team performs extensive compatibility assessments to ensure seamless connectivity with diverse databases, from SQL and Azure Data Lake to legacy systems. By incorporating connector tools and APIs within our Copilot approach, we achieve comprehensive system compatibility, enabling AI solutions to work harmoniously with existing structures. This integration approach allows clients to leverage AI without overhauling their workflows, making AI insights readily accessible across departments and applications.
Our Copilot AI Readiness framework, reinforced by industry-leading Microsoft partnerships, ensures that clients receive a compliant, secure, and integrated AI infrastructure. This enables them to maximize AI's benefits without compromising on security, efficiency, or ease of use. | * |

| 77 | | DATA PREPARATION

Describe what steps you take to prepare data for AI implementation, and how do you ensure data quality and consistency. | ⦿ Yes
○ No | Cadence Solutions, through our AI Readiness framework, follows a thorough approach to preparing data for AI implementation. Ensuring data quality and consistency is central to our process, supported by best practices from our Microsoft Content AI Partnership.

Data Assessment and Profiling
We start with a deep dive into data assessment and profiling, analyzing sources, formats, and structures across the organization. By examining metadata, data distribution, and integrity, we pinpoint inconsistencies, redundancies, and gaps. This profiling phase gives us a clear map for how best to prepare data, tailored to the specific AI objectives of the organization.

Data Cleaning and Transformation
With a focus on data quality, we engage in robust cleaning and transformation steps to address missing values, duplicates, and outliers, ensuring a refined dataset. Utilizing tools from Microsoft Purview, we automate standardization and normalization processes, which aligns data across sources and minimizes error risk—resulting in clean, high-quality data for the AI models.

Data Integration and Unification
In complex environments, data often exists in silos. Using Microsoft Graph API and Synapse Analytics, we consolidate data from multiple systems into a unified, coherent format for AI processing. This integration provides a single, consistent dataset, essential for generating reliable insights and making data accessible across platforms.

Data Enrichment and Feature Engineering
Feature engineering is where we enrich the data, pulling in the most critical variables and attributes needed for meaningful AI insights. By focusing on these specific data points, we ensure model accuracy and regulatory compliance, following best practices from our Risk Compliance and Advisory Partner Program.

Data Validation and Quality Assurance
Before finalizing the dataset, we conduct rigorous validation checks. Automated scripts and protocols help us verify consistency and integrity, ensuring that data meets our quality thresholds. This process gives confidence that the data is both accurate and representative, ready to support AI-driven insights.

Ongoing Data Monitoring and Governance
To maintain data quality over time, we set up continuous monitoring protocols with Microsoft Purview, allowing us to quickly detect and address any new data quality issues. This ongoing governance keeps the data accurate, reliable, and compliant, supporting long-term AI model performance.

With our Copilot AI Readiness framework, we ensure data is prepared, clean, and consistently governed, allowing clients to fully benefit from AI while meeting the highest standards in data management. This approach, supported by our Microsoft partnerships, ensures reliable data-driven insights tailored to organizational needs. |

| 78 | | PROOF OF CONCEPT

Provide one (1) example of a proof-of-concept project you have conducted and what were the outcomes. | ⦿ Yes
○ No | Proof-of-Concept Project: Automatic Records Classification with Microsoft Syntex and SharePoint Premium
Cadence Solutions recently conducted a proof-of-concept (PoC) project focused on automatic records classification using Microsoft Syntex, helping a public-sector client streamline their document management and compliance processes. The project aimed to reduce the time and manual effort required for document classification while enhancing data governance.
In this PoC, we configured Microsoft Syntex to automatically classify records and assign retention labels based on predefined criteria. Syntex uses AI to identify document types, extract metadata, and apply retention rules, which allowed our client to manage records more efficiently without sacrificing compliance.

Outcomes:
•   Improved Efficiency: By automating records classification, the client reduced manual processing time by over 60%, allowing their staff to focus on higher-value tasks rather than repetitive document handling.
•   Enhanced Compliance: Automatic labeling through Syntex ensured consistent application of retention policies, reducing the risk of human error and enhancing overall compliance with regulatory standards.
•   Scalable Solution: The success of the PoC demonstrated Syntex's scalability, with the client now planning to expand its use across other departments to ensure seamless records management organization-wide. This proof-of-concept with Microsoft Syntex provided a scalable, compliant, and efficient solution, showcasing Cadence Solutions' ability to integrate AI-powered tools for tangible improvements in data governance and operational efficiency.

Further information on this case study is located on our website. | * |
| 79 | | CUSTOM AI MODEL DEVELOPMENT

Describe your approach to developing custom AI models tailored to the specific needs of an entity. | ○ Yes
⦿ No | n/a | * |

| 80 | | | PILOT PROJECT

Describe how you manage and implement pilot projects. | ○ Yes
○ No | At Cadence Solutions, our approach to pilot projects is grounded in careful planning and practical validation to ensure AI solutions meet client expectations in a manageable, low-risk environment.
Initial Planning and Goal Setting
Every pilot project begins with clear planning and alignment with stakeholders. Together, we define specific objectives, success metrics, and desired outcomes while also setting the project's scope, timeline, and budget. This ensures that everyone involved has a shared understanding of the goals and deliverables, creating a strong foundation for the pilot.
Data Preparation and System Configuration
Once the objectives are set, we prepare the data and configure the systems for the pilot. Our team cleans, standardizes, and organizes the data, making it ready for AI processing. Using tools like Microsoft Syntex or Azure Cognitive Services, we set up the AI solution in a way that matches the client's environment, ensuring that it integrates smoothly with existing IT systems. This data and system prep allows us to assess the AI's effectiveness accurately from the start.
Test Run and User Training
With the system configured, we move into the test run and provide hands-on training for end users and IT staff. These sessions familiarize users with the new tools and allow them to give feedback early on. This interactive approach helps users engage with the solution while also providing valuable insights that guide the pilot's progress.
Performance Monitoring and Optimization
Throughout the pilot, we monitor performance, capturing key data metrics to track progress and make adjustments. As feedback and data insights come in, we continuously fine-tune the AI model to ensure it meets performance goals and aligns with real-world use cases. This phase allows us to tailor the solution specifically to the client's environment, optimizing outcomes in real time.
Evaluation and Reporting
At the close of the pilot, we conduct a comprehensive evaluation, comparing results against the initial goals. The findings are compiled into a report that details the pilot's impact, highlights achievements, and addresses any areas for improvement. This report provides a clear, data-driven assessment of the AI solution's value and effectiveness.
Scaling and Full Implementation
If the pilot meets success criteria, we work with the client to scale the solution across the organization. This phase includes additional training, expanded deployment, and any necessary integrations with other systems, ensuring that the AI solution fully supports the client's operational needs.
Through each step, Cadence Solutions ensures that pilot projects deliver practical, measurable results, allowing clients to validate and experience the benefits of AI before committing to a full rollout. This structured approach builds confidence in the technology, setting a solid foundation for successful, organization-wide implementation. | * |

| 81 | | DEPLOYMENT AND INTEGRATION

Describe how you take a pilot project and transition it to a full-scale deployment, include what metrics are used to measure their success. | ⦿ Yes
◯ No | Transitioning from Pilot to Full-Scale Deployment
At Cadence Solutions, our approach to scaling pilot projects into full deployments ensures that the initial success is carried forward and optimized for organization-wide impact. For a recent financial services client, we used AI to classify human resources files, ensuring each document was placed in the correct migration location with a structured information architecture and secure access controls.
Evaluating Pilot Success and Metrics
During the pilot, we closely monitored the percentage of documents correctly classified as a primary metric to measure AI accuracy. For this client, achieving a high classification rate was critical, as each HR document needed to be accurately categorized to comply with security standards and ensure proper placement. The pilot achieved over 85% classification accuracy, meeting the client's compliance thresholds and setting a benchmark for full-scale deployment.
Scaling Infrastructure and Expanding System Capabilities
With strong metrics in place, we moved to expand system capacity, configuring the AI model to handle larger document volumes across the organization. Microsoft's AI Solutions provided the scalability needed to maintain performance while processing higher file volumes. Additionally, we applied the structured information architecture and security protocols established during the pilot, ensuring that HR files remained accurately categorized and securely stored in the new system.
Enhanced Training and Security Protocols
Full deployment included comprehensive training sessions for HR and IT teams, covering the AI classification process and data security measures. Given the sensitivity of HR records, we emphasized role-based access controls and secure data handling practices, ensuring that classified documents were only accessible by authorized users.
Ongoing Monitoring and Optimization
As deployment progressed, we established real-time monitoring systems to continuously track the percentage of correctly classified documents. Alerts were set up to identify any deviations in accuracy, allowing us to make immediate adjustments if needed. Security audits were conducted periodically to ensure continued adherence to privacy and data protection standards, critical for maintaining client trust and compliance.
Long-Term Success Metrics
Post-deployment, we continued to track classification accuracy, aiming to sustain or exceed the 85% rate achieved during the pilot. Additional metrics, such as reduced manual effort and improved data retrieval speed, demonstrated the solution's positive impact on HR operations. Feedback from users confirmed high satisfaction with the solution's reliability and ease of use, further validating the AI's effectiveness in the full deployment.
Through a focus on metrics like the percentage of documents correctly classified, Cadence Solutions' approach to transitioning from pilot to full deployment delivers a high-performing, compliant AI solution. Our method provides clients with measurable benefits that enhance efficiency, security, and overall data management. | * |

| 82 | | ONGOING SUPPORT AND MAINTENANCE

Describe what ongoing support and maintenance services are offered to ensure continued success of AI solutions in the face of rapidly evolving technology. | ⦿ Yes
○ No | We are committed to providing comprehensive ongoing support and maintenance services to ensure the long-term success of AI solutions as technology evolves. Our approach combines proactive monitoring, continuous improvement, and responsive support to keep AI systems aligned with each client's strategic goals, security, and compliance requirements.
Our support model includes regular performance assessments and updates to AI algorithms, configurations, and security protocols, enabling us to adapt solutions in response to evolving technology standards and emerging threats. We conduct quarterly reviews to assess system performance, identifying areas for AI optimization to ensure they continue delivering accurate, relevant insights as business needs change. These reviews are complemented by annual technology audits, which evaluate system alignment with industry best practices and incorporate advancements to maximize efficiency and compliance.
We also offer change management support as part of our ongoing services, ensuring that any system updates or changes are well-communicated and seamlessly integrated into clients' daily operations. Our team provides continuous training opportunities to keep users proficient with AI technologies and updates, offering refresher courses and on-demand resources to help users leverage new AI features effectively. Additionally, our 24/7 support desk ensures that clients have access to expert assistance whenever they need it, with dedicated account managers available for personalized service and strategic guidance.
Finally, as a partner in our clients' digital transformation journeys, Cadence Solutions is committed to adapting our services as AI technology progresses. Through our retainer and subscription-based support options, we provide flexible, scalable services that evolve alongside AI advancements, allowing clients to stay at the forefront of innovation while maintaining robust security and compliance. This proactive, adaptable approach helps ensure that our clients continue to gain maximum value from their AI investments, regardless of how technology changes. | * |

| 83 | TRAINING AND EDUCATION

Describe what training and education programs you provide to help entity staff effectively adopt, use, and manage AI solutions.

Describe the topics and skills covered in your training program as well as your experience in providing AI training and education. | | ⦿ Yes
○ No | Cadence Solutions' training programs are designed to empower organizations with the foundational skills essential for managing data governance, compliance, and information security, while also preparing them for future AI integration. Embedded directly into our project implementations, these training sessions ensure that clients' teams are fully prepared to adopt, use, and manage advanced technologies in a secure and compliant manner. As ARMA International's exclusive Microsoft Purview Training Partner, Cadence Solutions has been uniquely recognized for our expertise and ability to deliver high-quality, relevant training for Microsoft 365 and Microsoft Purview. This partnership underscores our commitment to setting industry standards in data governance and compliance training, ensuring that organizations are equipped with best practices that support both their current needs and AI-readiness.

Our training offerings encompass three primary areas:

Records Management Training
This in-depth course focuses on Microsoft Purview's records management capabilities, providing participants with the skills to establish structured document retention and regulatory compliance practices. This training ensures that organizations can manage data at scale, creating a well-organized information architecture that supports accurate, consistent data management—a critical foundation for effective AI integration.

eDiscovery Training
Our eDiscovery course covers essential functions such as content search, audit capabilities, and legal holds, equipping participants to handle sensitive information and maintain compliance during legal inquiries. By mastering these skills, participants gain the tools needed to secure, locate, and analyze data within Microsoft 365, establishing a solid framework for managing data within AI systems as organizations transition toward data-driven applications.

Data Loss Prevention (DLP) Training
This course teaches participants how to leverage Microsoft Purview DLP tools to secure sensitive information and implement robust data protection policies. Effective data security is paramount for AI adoption, as it ensures data integrity and privacy—two essential components for building trustworthy AI systems. By developing a proactive approach to DLP, organizations create secure data environments that support safe and compliant AI use.

Each course combines practical, hands-on learning with live demonstrations and interactive exercises led by experienced trainers, equipping participants with actionable skills they can immediately apply. Additionally, Sourcewell members receive a 15% discount on these offerings, making advanced training accessible and cost-effective. By building robust data governance and security foundations through our training, clients are not only positioned for compliance but are also well-prepared for the complexities of AI, as they establish the structured, compliant data landscapes necessary for future innovation. |

Table 9: Exceptions to Terms, Conditions, or Specifications Form

Line Item 84. 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 *
	○ Yes ◉ No

Documents

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

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.

2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.

3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.

4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."

- Pricing - Pricing.pdf - Thursday November 07, 2024 09:49:54
- Financial Strength and Stability (optional)
- Marketing Plan/Samples - Marketing Plan and Samples.zip - Thursday November 07, 2024 10:00:48
- WMBE/MBE/SBE or Related Certificates (optional)
- Standard Transaction Document Samples - Standard Transaction Document Samples.zip - Thursday October 24, 2024 17:36:07
- Requested Exceptions (optional)
- Upload Additional Document (optional)

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. - Jerad Uytterhagen, Business Development, Cadence Solutions Inc.

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

○ **Yes**   ◉ **No**

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

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

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum_16_Artificial_Intelligence_Readiness_RFP110724 Thu October 31 2024 01:28 PM	☑	19
Addendum_15_Artificial_Intelligence_Readiness_RFP110724 Tue October 29 2024 04:21 PM	☑	2
Addendum_14_Artificial_Intelligence_Readiness_RFP110724 Mon October 28 2024 03:58 PM	☑	2
Addendum_13_Artificial_Intelligence_Readiness_RFP110724 Fri October 25 2024 08:03 AM	☑	4
Addendum_12_Artificial_Intelligence_Readiness_RFP110724 Tue October 22 2024 02:06 PM	☑	2
Addendum_11_Artificial_Intelligence_Readiness_RFP110724 Thu October 17 2024 12:52 PM	☑	6
Addendum_10_Artificial_Intelligence_Readiness_RFP110724 Tue October 15 2024 03:11 PM	☑	3
Addendum_9_Artificial_Intelligence_Readiness_RFP110724 Mon October 14 2024 04:12 PM	☑	4
Addendum_8_Artificial_Intelligence_Readiness_RFP110724 Thu October 10 2024 03:44 PM	☑	3
Addendum_7_Artificial_Intelligence_Readiness_RFP110724 Wed October 9 2024 08:27 AM	☑	2
Addendum_6_Artificial_Intelligence_Readiness_RFP110724 Mon October 7 2024 01:55 PM	☑	2
Addendum_5_Artificial_Intelligence_Readiness_RFP110724 Wed October 2 2024 02:17 PM	☑	2
Addendum_4_Artificial_Intelligence_Readiness_RFP110724 Mon September 30 2024 01:45 PM	☑	4
Addendum_3_Artificial_Intelligence_Readiness_RFP110724 Thu September 26 2024 03:00 PM	☑	4
Addendum_2_Artificial_Intelligence_Readiness_RFP110724 Tue September 24 2024 09:11 AM	☑	7
Addendum_1_Artificial_Intelligence_Readiness_RFP110724 Fri September 20 2024 12:54 PM	☑	2