Sourcewell

MASTER AGREEMENT #110724
CATEGORY: Artificial Intelligence (AI) Readiness, Implementation, and Support Services
SUPPLIER: Outlook Insight LLC

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Outlook Insight LLC, 300 Deschutes Way SW, Suite 209, Tumwater, Wa 98501 (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.

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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.

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Article 2:
Sourcewell and Supplier Obligations

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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.
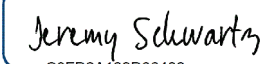
1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within 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
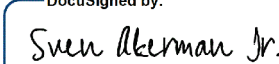
standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must 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.

Sourcewell	Outlook Insight LLC
Signed by: *Jeremy Schwartz*	DocuSigned by: *Sven Akerman Jr.*
C0FD2A139D06489...	906A0EB302EE49C...
By: _____	By: _____
Jeremy Schwartz	Sven Akerman Jr.
Title: Chief Procurement Officer	Title: President
Date: 4/4/2025 | 10:10 AM CDT	Date: 4/4/2025 | 7:38 AM PDT

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

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Vendor Details

Company Name:	Outlook Insight LLC
Does your company conduct business under any other name? If yes, please state:	WA
Address:	300 Deschutes Way SW Suite 209 Tumwater, Washington 98501
Contact:	Sean Campbell
Email:	contact@outlookinsight.com
Phone:	360-288-8000
Fax:	360-288-8003
HST#:	75-2855207

Submission Details

Created On:	Thursday September 26, 2024 15:37:56
Submitted On:	Thursday November 07, 2024 10:16:34
Submitted By:	Sean Campbell
Email:	contact@outlookinsight.com
Transaction #:	1f923f1d-a6c0-4eba-b5db-80e83c366e87
Submitter's IP Address:	71.227.169.182

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.	Outlook Insight LLC	*
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y	*
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).	Outlook Insight LLC will be solely responsible for offering and delivering the solutions within this proposal. No subsidiaries, D.B.A.s, or affiliates will be involved.	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	UYALZBUUF8V3	*
5	Provide your NAICS code applicable to Solutions proposed.	541512 - Computer Systems Design Services:	
6	Proposer Physical Address:	300 Deschutes Way SW Suite 209 Tumwater, Washington 98501	*
7	Proposer website address (or addresses):	https://outlookinsight.com/	*
8	Proposer's Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the "Proposer's Assurance of Compliance" on behalf of the Proposer):	Sven Akerman Jr. Title – President 300 Deschutes Way SW Suite 209 Tumwater, Washington 98501 Email – svenakerman@outlookinsight.com Phone Number – 360-970-7606	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Sean Campbell Title – Chief Operating Officer 300 Deschutes Way SW Suite 209 Tumwater, Washington 98501 Email – seancampbell@outlookinsight.com Phone Number – 425-829-1191	*
10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	N/A - No one else is involved in the proposal.	

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. | Brief History of Outlook Insight LLC:
Outlook Insight LLC is a forward-thinking technology and consulting company specializing in providing innovative solutions to government and public sector organizations. Established in [Year], we have steadily grown our expertise in Artificial Intelligence (AI) solutions, project management, and government-focused software services, including our flagship product, the Knowledge Interpreter (KI), a staff enablement intelligence system.

Core Values:
Innovation: We are committed to continuously pushing the boundaries of technology, particularly in AI, to create solutions that empower public entities to improve efficiency and decision-making.
Client-Centric Focus: We prioritize understanding the unique needs of our clients, tailoring every solution to align with their strategic goals.
Integrity and Transparency: We operate with the highest levels of integrity, ensuring clear communication, ethical decision-making, and transparent processes in all our partnerships.
Collaboration: At Outlook Insight, we foster collaboration both internally and externally. We build strong relationships with our clients and partners to drive shared success.
Business Philosophy:
Our business philosophy is anchored in delivering tailored, scalable solutions that address the evolving needs of government and public agencies. By focusing on innovation, customer service, and long-term partnerships, we aim to help public entities unlock the full potential of AI and data-driven decision-making.

We believe in creating value through efficiency, flexibility, and the deployment of state-of-the-art technology while keeping accessibility and usability at the forefront of our solutions.

Industry Longevity:
With a team that has extensive experience in AI readiness, implementation, and support services, Outlook Insight has successfully supported government clients across multiple projects, including AI integrations, policy certification tools, and document management systems. Our deep understanding of government operations and public sector challenges positions us as a leader in offering AI solutions designed for scalability and flexibility across various sectors.

In recent years, we have implemented AI knowledge interpreters for agencies such as Washington State's DVR, providing tailored solutions that streamline internal processes and improve decision-making capabilities. Our commitment to the public sector drives our continuous investment in developing cutting-edge, reliable, and accessible AI solutions. | * |
| 12 | What are your company's expectations in the event of an award? | Collaborative Partnership with Sourcewell and Participating Entities: Outlook Insight LLC expects to foster a collaborative partnership with Sourcewell and its participating entities. We aim to work closely with stakeholders to fully understand their unique needs and tailor our AI solutions accordingly. We value long-term partnerships, where we can continually optimize solutions as the needs of participating entities evolve.

Clear Communication and Transparency: We expect open lines of communication with Sourcewell, particularly during the implementation phase, to ensure all parties are aligned on project timelines, deliverables, and expectations. Transparent reporting and consistent updates will be a priority throughout the contract term.

Effective Implementation and Support: Upon award, we expect to execute our AI readiness assessments and implementation strategies efficiently, meeting the specific goals of each participating entity. Our team is prepared to provide ongoing support, including training and troubleshooting, ensuring smooth deployment and long-term system maintenance.

Scalability and Growth Opportunities: We expect the awarded contract to allow us to scale our services across Sourcewell's diverse and expanding network of participating entities. Our solutions are designed to be flexible and scalable, and we look forward to the opportunity to extend our services to multiple regions and sectors.

Commitment to Delivering Measurable Results: Outlook Insight LLC expects to drive significant value for participating entities by improving operational efficiency, decision-making processes, and accessibility through our AI solutions. We anticipate measurable outcomes in terms of increased productivity, better policy compliance, and more informed decision-making, aligning with the goals of Sourcewell's entities.

Mutual Success and Long-Term Engagement: We expect the partnership to yield mutual success, with participating entities benefiting from the latest AI technologies while Outlook Insight continues to grow its presence in the public sector. We look forward to potentially extending the contract, adapting our solutions to future technological advancements, and providing ongoing value to Sourcewell and its members. | * |

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.	Attached a report from DnB. Please note that it is based on some older data (we've grown 3x this past year).	*
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:	Outlook Insight provides services for state agencies nationwide and is currently in various stages of readiness, implementation, and support for over 20 agencies. Each agency we work with starts with readiness. We take the time to educate on the benefits of AI and the transformative difference it can make. We then help agencies navigate the establishment of AI guardrails for the safe use of AI by providing real-world experience and lessons learned. We have work with all levels of government from Statewide CIOs to agency level Directors, Managers, and Supervisors. Our implementation services include the managed services in cloud hosting environments, identification and deployment of appropriate AI language models, testing the efficacy of models across domains, and software layers to expose the underlying capabilities to users. We understand the importance of accessibility and embrace a culture of making solutions that work for everyone. We provide support services for products we sell and services we provide through a structured and disciplined approach to customer services. Our teams are uniquely trained in all facets of the products and services we provide, with a minimum of 5 years of experience required.	*
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:	Outlook Insight has not engaged with entities in Canada - yet.	*
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.	Not applicable. Outlook Insight has never filed for bankruptcy.	*
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?	Answer for Service Provider (Part b): Outlook Insight LLC is best described as a service provider. We specialize in delivering tailored AI readiness, implementation, and support services to public sector clients. Our relationship with our sales and service teams is structured to ensure the highest level of quality and accountability. Sales and Service Force: Our sales and service teams are composed of in-house employees who are experts in their respective fields. We prioritize internal hiring for both sales and service roles to ensure that all team members are fully aligned with our company's core values and commitment to client success. Delivery of Products and Services: All AI solutions, including readiness assessments, model development, and ongoing support, are delivered directly by Outlook Insight's internal team. Our flagship products are also available via the NASPO network of dealers, and we have active contracts with SHI and Insight Public Sector. We maintain relationships with these dealer network for those states where NASPO is the preferred marketplace. This ensures that our clients receive consistent, high-quality delivery across all projects and can leverage their preferred marketplace for purchases. By maintaining a fully in-house team, we are able to provide highly specialized and customized services that meet the unique needs of Sourcewell's participating entities.	*
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.	Outlook Insight values certification of our staff. Currently, we have team members who hold PMI-PMP certification, Microsoft Azure Solutions Architect Expert certification, Microsoft 365 Administrator Expert certification, Microsoft Certified Trainer, Microsoft Certified Educator, among others. These industry recognized skills are leveraged to deeply integrate our solutions within the predominate environment of Microsoft technology in government agencies, and effective project management capabilities to keep projects on-time and on-budget.	*

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.	Outlook Insight LLC has not had any debarments or suspensions within the past seven years, nor have any of the possible responsible parties involved in this proposal. We will provide written notice to Sourcewell if Outlook Insight LLC enters a debarment or suspension status at any time during the pendency of this RFP evaluation.	*
20	Describe any relevant industry awards or recognition that your company has received in the past five years.	Innovation Exemption: https://watech.wa.gov/sites/default/files/2024-07/DSHS_WaTech_Innovation_Exemption_Justification_72324.pdf DSHS Innovation Award: https://www.dshs.wa.gov/os/office-communications/media-release/dshs-division-vocational-rehabilitation-introduces-innovative-artificial-intelligence-tool	*
21	What percentage of your sales are to the governmental sector in the past three years?	Over the past three years, approximately 90% or more of Outlook Insight LLC's sales have been to the governmental sector, including federal, state, and local government entities.	*
22	What percentage of your sales are to the education sector in the past three years?	~90% Department of Education is funding the vocational rehabilitation program where our work has primarily been done.	*
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?	Outlook Insight LLC does not currently hold any state or cooperative purchasing agreements. Therefore, there is no annual sales volume to report for such agreements over the past three years.	*
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?	Outlook Insight LLC does not currently hold any GSA contracts or Standing Offers and Supply Arrangements (SOSA). Therefore, there is no annual sales volume to report for such contracts over the past three years.	*

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 *	
Washington State Department of Vocational Rehabilitation (DVR)	Jack Fruitman	360-946-8166	*
Massachusetts Commission for the Blind	John Oliveira	1-800-392-6450	*
Missouri Department of Elementary and Secondary Education Vocational Rehabilitation	Samantha Heckemeyer	573-522-8088	*
Mass Ingenuity	Aaron Howard	206-550-3503	
Washington Traffic Safety Commission	Bernie Shaw	360-725-9872	

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. | Locations of Network of Sales and Service Providers:

Sales Network: Outlook Insight LLC has a centralized sales team based in 0Tumwater, WA, serving the needs of clients across the United States and Canada. While we do not maintain multiple regional offices, our team is highly experienced in remote collaboration, allowing us to effectively support participating entities in diverse locations.

Service Providers: Our service delivery network includes remote teams based throughout the U.S. and Canada, who are capable of both virtual and on-site service delivery as required by our clients.

2. Number of Workers Involved:

Sales Team: Our sales force consists of 5 full-time equivalents (FTEs) who specialize in government and public sector sales, with deep knowledge of Sourcewell contracts and cooperative purchasing models.
Service Team: The service team includes 10 FTEs, composed of AI specialists, developers, and technical support staff who work collaboratively to deliver solutions to clients across the U.S. and Canada.
3. Employee Type:

All workers, both in sales and service, are direct employees of Outlook Insight LLC. This approach allows us to maintain a high level of quality control, expertise, and accountability in the solutions we deliver.
4. Overlap Between Sales and Service Functions:

Our sales and service teams work in close coordination, particularly during the implementation phase. Our Technical Product Manager and sales representatives collaborate to ensure that clients' needs are well understood during the sales process and seamlessly transitioned to the service team during implementation.
Sales-to-Service Handoff: The handoff between sales and service is facilitated by cross-functional meetings, ensuring that service providers have a clear understanding of the customer's requirements as documented during the sales process. Additionally, our sales team stays involved during key phases of service delivery to address any customer relationship needs or questions that arise. | * |
| 27 | Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods. | Outlook Insight LLC does not utilize an external network of dealers, distributors, or resellers to deliver our solutions. All AI readiness, implementation, and support services proposed in this RFP are delivered directly by Outlook Insight's internal team.

Direct Service Delivery: Our in-house team of professionals, which includes AI specialists, developers, and technical support staff, is responsible for delivering all aspects of the solution, from readiness assessments to implementation, training, and ongoing support.
Benefits of Direct Delivery: By handling service delivery internally, we ensure consistent quality and accountability, as well as a tailored approach that meets the specific needs of each participating entity. This also allows us to maintain direct communication with our clients and effectively respond to their evolving requirements. Outlook Insight's delivery model is designed to provide end-to-end service without reliance on third-party authorized sellers, ensuring high-quality, flexible, and responsive solutions for Sourcewell's participating entities. | * |

| 28 | Service force. | Locations of Service Providers:

Outlook Insight LLC operates a centralized service team with professionals based across the United States and Canada. This decentralized model allows our service team to deliver solutions effectively to Sourcewell's diverse network of participating entities. The team is fully capable of providing remote support and on-site services when needed.
2. Number of Workers (Full-Time Equivalents):

Our service force consists of 10 full-time equivalents (FTEs), who are dedicated to providing AI readiness, implementation, support, and ongoing maintenance services. This includes AI specialists, developers, technical support staff, and training professionals.
3. Employee Type:

All members of the service team are direct employees of Outlook Insight LLC. This structure enables us to maintain the highest standards of quality, responsiveness, and technical expertise throughout the delivery process.
4. Service Capabilities:

Our service team provides end-to-end support, starting from initial AI readiness assessments through to model deployment, training, and long-term maintenance. We offer comprehensive technical support, including troubleshooting, upgrades, and system optimizations to ensure that participating entities derive maximum value from our solutions.
5. Collaboration Between Sales and Service:

The service team works closely with our sales force to ensure a seamless transition from pre-sales to post-sales support. This collaboration includes joint meetings and the use of shared documentation to make sure that the client's needs are fully understood and addressed at every stage of the engagement. | * |
| 29 | Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others. | Direct Ordering:

All orders for our AI readiness, implementation, and support services are managed directly by Outlook Insight LLC. We do not involve external distributors, dealers, or resellers in our ordering or service delivery process.
2. Initial Contact:

Orders are typically initiated through a consultation or a formal proposal request. Once an entity is ready to proceed, they can place an order by contacting our sales team directly via email or phone, or through a formal purchase order process.
3. Contract and Scope Confirmation:

Upon receiving an order, our team works closely with the entity to confirm the scope of services, timeline, and specific requirements. This step ensures that we have a mutual understanding of expectations before work begins.
4. Order Processing:

Once the order details are confirmed, our project management team takes over, assigning necessary resources and scheduling the service delivery. The client will receive an order confirmation with key details, including the timeline, assigned contacts, and any required deliverables.
5. Service Delivery and Support:

Services are then delivered by our in-house team as agreed upon. The same team also provides ongoing support to address any questions or challenges that arise after implementation.
By managing orders and delivery internally, Outlook Insight ensures high-quality service, clear communication, and consistent delivery for all participating entities. | * |

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.	Customer Service Program Structure: Outlook Insight LLC provides a comprehensive customer service program that supports all participating entities throughout the engagement lifecycle, from implementation to ongoing support and maintenance. Our dedicated Customer Service Team consists of technical support specialists, AI solution experts, and account managers who work together to ensure seamless communication and resolution of issues. 2. Customer Service Process and Procedure: Initial Inquiry: Customers can contact our customer service team through multiple channels—via phone, email, or through our Jira Service Management Portal. Each contact is logged to ensure proper follow-up. Ticketing System: All service requests are documented in our ticketing system (Jira Service Management Portal) and assigned a unique ticket number. This system allows us to track the progress of each request and ensure timely resolution. Prioritization: Issues are classified into three priority levels: Critical: System-wide issues that impact service availability. High: Significant issues affecting key functionalities but not the entire system. Standard: Routine questions, maintenance, and feature requests. 3. Response-Time Capabilities and Commitments: Critical Issues: Acknowledged within 1 hour of reporting, with a targeted resolution time of 4 hours. Our technical support team is available 24/7 to address any critical issues. High Priority Issues: Responded to within 4 hours, with a targeted resolution time of 1 business day. Standard Issues: Responded to within 1 business day, with a resolution time of 3-5 business days, depending on the complexity of the request. 4. Ongoing Communication: We provide regular status updates for ongoing issues and keep clients informed of progress until resolution is complete. Once an issue is resolved, a post-resolution follow-up is conducted to ensure customer satisfaction. 5. Customer Satisfaction and Feedback: After each service interaction, we solicit feedback from the customer to understand their experience and identify opportunities for improvement. Monthly Performance Reports are shared with clients summarizing response times, resolved issues, and ongoing actions to provide transparency. 6. Incentives and Service Goals: To ensure that our team meets the stated service goals, we have implemented an internal incentive program for our support staff based on: Response-Time Metrics: Meeting or exceeding the specified response times. Customer Satisfaction Scores: Positive feedback from customers is tracked, and team members who consistently receive excellent feedback are rewarded. 7. Dedicated Account Manager: Each client is assigned a dedicated account manager who serves as their main point of contact, ensuring continuity and familiarity with the customer's requirements and history. The account manager helps escalate issues and ensures timely resolution of any concerns.

| 31 | Describe your ability and willingness to provide your products and services to Sourcewell participating entities. | Ability to Provide Products and Services:

Comprehensive Solutions: Outlook Insight LLC has extensive experience delivering AI readiness, implementation, and support services to government and public sector clients, which aligns closely with the needs of Sourcewell participating entities. Our solutions are designed to be scalable, flexible, and customizable to meet the specific requirements of a wide range of public agencies.
Skilled Workforce: Our team of AI specialists, developers, technical support staff, and project managers is fully equipped to provide end-to-end services, from initial consultation and strategy development to system deployment, training, and ongoing support.
Remote and On-Site Capabilities: We offer a combination of remote support and on-site services (as needed), ensuring that we can effectively serve Sourcewell entities across the United States and Canada.
2. Willingness to Provide Products and Services:

Commitment to the Public Sector: Outlook Insight LLC is committed to serving public sector clients and takes pride in providing solutions that enhance the efficiency and effectiveness of government services. We recognize the unique challenges faced by public entities and are eager to bring our expertise to help solve those challenges.
Participation in Cooperative Contracts: We understand the cooperative purchasing model and are fully willing to provide our services under the Sourcewell contract structure. This allows us to deliver our solutions more efficiently and cost-effectively to Sourcewell's broad network of participating entities, ultimately benefiting public agencies that might otherwise face procurement challenges.
Scalability and Support: We are prepared to scale our services to meet the needs of Sourcewell's growing list of participating entities. Our flexible service model ensures that all entities, regardless of size, can benefit from our solutions.
3. Alignment with Sourcewell's Mission:

We are fully aligned with Sourcewell's mission of providing high-quality solutions through cooperative purchasing, and we are ready to leverage our experience and capabilities to support public entities in achieving their goals. Our willingness to adapt our services to the specific needs of each participating entity demonstrates our commitment to delivering tailored, impactful solutions. | * |
| 32 | Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada. | Ability to Provide Products and Services in Canada:

Experience in Cross-Border Service Delivery: Outlook Insight LLC has experience providing remote services across North America, and our team is fully capable of supporting Canadian entities. We understand the unique needs of Canadian public sector organizations and have successfully worked with public entities that have cross-border considerations.
Remote Capabilities: We leverage robust remote support capabilities to deliver our AI readiness, implementation, and support services across different geographies, including Canada. Our team of AI specialists, developers, and technical support staff is equipped with the tools and infrastructure needed to support entities regardless of location.
Compliance with Canadian Standards: We are prepared to meet all relevant Canadian regulations and industry standards for data privacy, security, and accessibility. We have a thorough understanding of the Canadian Free Trade Agreement (CFTA), as well as local data privacy requirements such as PIPEDA, ensuring compliance while delivering services.
2. Willingness to Provide Products and Services in Canada:

Commitment to Serving Canadian Entities: Outlook Insight LLC is eager to extend our AI solutions to Sourcewell participating entities in Canada. We recognize the importance of providing customized services that cater to the specific needs of Canadian public agencies, including provincial, territorial, and municipal governments.
Cross-Cultural Awareness and Adaptation: We are committed to adapting our services to align with the specific operational and cultural needs of Canadian entities, ensuring a tailored approach that supports their unique goals.
Scalable Delivery Model: Our service delivery model is designed to be scalable and adaptable, making it easy to extend our offerings to public sector clients in Canada. We are ready to work closely with Canadian entities to ensure seamless implementation, integration, and ongoing support of our AI solutions.
3. Alignment with Sourcewell's Cooperative Purchasing Model:

Participation in Sourcewell Contracts: We fully support the cooperative purchasing model that Sourcewell offers, and are willing to extend our services to Canadian entities under this structure, providing efficiency, cost savings, and simplified procurement. | * |

33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	Outlook Insight LLC is committed to providing our AI readiness, implementation, and support services across all regions of the United States and Canada. We leverage our remote service capabilities to ensure coverage regardless of geographic location. Full Service Coverage: At this time, there are no specific geographic areas within the United States or Canada that we are unable to serve under the proposed agreement. Our team is well-equipped to support participating entities through a combination of remote services and on-site visits when required, ensuring all regions can benefit from our solutions. On-Site Service Considerations: While we aim to provide on-site support across all locations, some remote or rural areas may require longer lead times for on-site visits. However, our robust remote capabilities enable us to provide effective and timely support, mitigating any potential limitations of on-site access. Outlook Insight remains flexible and adaptable in our service approach, ensuring that any participating entity, regardless of location, can access the full range of services we offer.	*
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.	Outlook Insight LLC is committed to providing our AI readiness, implementation, and support services to all types of participating entities under the Sourcewell agreement. We do not have any restrictions on the type of participating entity that can access our solutions. Full Access to All Participating Entities: Our solutions are designed to be scalable and flexible, making them accessible to a wide range of participating entities, including federal, state, and local governments, educational institutions, nonprofits, and tribal governments across the United States and Canada. Customized Solutions for Different Needs: We understand that each entity may have different needs, and we are prepared to customize our offerings to meet the specific requirements of each type of entity, ensuring that everyone receives the support and solutions they require. There are no account types that will be excluded or restricted from full access to our solutions.	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Outlook Insight LLC is committed to providing our services to participating entities located in Hawaii, Alaska, and U.S. Territories, and our solutions are designed to be accessible regardless of geographic location. However, there are a few logistical considerations: 1. Service Delivery Requirements: Remote Support: The primary method of service delivery for entities in Hawaii, Alaska, and U.S. Territories will be through remote support. Our team is equipped with the tools and capabilities needed to deliver high-quality remote services, including AI implementation, training, and technical support. 2. On-Site Service Restrictions: On-Site Visits: While we are able to provide on-site services to entities in these locations, additional lead time may be required to coordinate travel due to geographic distance. This may also lead to increased travel costs associated with on-site support, which will be discussed with the participating entity in advance to ensure clarity. 3. Time Zone Considerations: Support Availability: Due to the time zone differences, our support availability for participating entities in Hawaii, Alaska, and U.S. Territories may require coordination to ensure that service is provided during mutually convenient hours. We remain flexible and willing to adjust support hours to meet the needs of these entities. 4. Compliance and Data Privacy: We ensure that our solutions comply with all applicable local regulations and data privacy requirements for participating entities in Hawaii, Alaska, and U.S. Territories. We will work with these entities to understand any specific legal or compliance needs unique to their region. Outlook Insight LLC is fully committed to ensuring that all participating entities, regardless of their geographic location, have access to our AI solutions and receive the necessary support to achieve their goals.	*

| 36 | Will Proposer extend terms of any awarded master agreement to nonprofit entities? | Yes, Outlook Insight LLC is willing to extend the terms of any awarded master agreement to nonprofit entities. We recognize that many nonprofit organizations serve critical public needs and can benefit greatly from the AI solutions we provide.

Commitment to Public Sector and Nonprofits: Our solutions are designed to be flexible and scalable, making them accessible and valuable to nonprofit organizations that are eligible under Sourcewell's cooperative purchasing model.
Same Terms and Conditions: Nonprofit entities will receive the same terms and conditions as government and educational entities participating in the Sourcewell agreement, ensuring consistent pricing, service delivery, and support across all eligible sectors.
We are committed to supporting nonprofits in their mission by providing equitable access to our AI readiness, implementation, and support services. | * |

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. | Target Audience Identification:

Our marketing strategy begins with identifying the target audience—public sector entities, including government agencies, educational institutions, nonprofits, and tribal governments across the United States and Canada. We will focus on promoting our AI solutions to decision-makers such as CIOs, IT managers, procurement officers, and program directors who oversee technology implementation.
2. Leveraging the Sourcewell Network:

We will actively leverage Sourcewell's extensive network by collaborating with their outreach and marketing teams to create co-branded marketing materials. These materials will highlight the benefits of our AI solutions and how they align with the goals of Sourcewell's participating entities.
Utilize Sourcewell's online procurement portal and marketing channels to promote our awarded contract and ensure visibility among potential participants.
3. Content Marketing and Thought Leadership:

Webinars and Educational Content: Host webinars and workshops in partnership with Sourcewell to educate participating entities about AI readiness, implementation, and the specific benefits of our solutions. These webinars will showcase use cases, benefits, and testimonials from current clients.
Whitepapers and Case Studies: Develop whitepapers and case studies showcasing our AI readiness projects and their impact on public sector efficiency. This will include success stories from similar projects, demonstrating the real-world value of our solutions.
4. Digital Marketing Campaign:

Launch a targeted digital marketing campaign that includes email marketing, social media, and search engine marketing (SEM) to reach key stakeholders within public agencies. The campaign will emphasize our alignment with Sourcewell's purchasing model, making procurement easier for participating entities.
Website Presence: Create a dedicated landing page on our website that outlines the benefits of purchasing our services through the Sourcewell contract. This page will serve as a hub for interested entities to learn more about our offerings and contact our sales team.
5. Outreach to Current and Potential Clients:

Direct Outreach: We will reach out to existing public sector clients and contacts to inform them of our Sourcewell contract, highlighting the streamlined procurement process. This will include email campaigns and personalized communications from our sales team.
Trade Shows and Conferences: Attend relevant public sector conferences and trade shows to promote our solutions. We will showcase our AI readiness services, with a focus on how entities can procure them through Sourcewell, emphasizing the benefits of cooperative purchasing.
6. Representative Marketing Materials:

Brochures and Flyers: Develop promotional brochures and flyers specifically designed for Sourcewell's participating entities, highlighting the ease of procurement, cost savings, and proven results of our AI solutions.
Infographics: Create infographics that visually represent the benefits and outcomes of AI readiness, making complex information more digestible for potential clients.
7. Incentives and Promotions:

Offer a limited-time incentive for new entities that procure our services through the Sourcewell contract, such as additional support hours or discounted onboarding services.
8. Metrics for Success:

Track the effectiveness of our marketing strategy by monitoring key metrics, such as website traffic, webinar attendance, conversion rates from digital campaigns, and engagement at events. We will also gather feedback from Sourcewell and participating entities to continuously improve our approach. | * |

| 38 | Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness. | Social Media Marketing:

Platform Utilization: Outlook Insight LLC actively uses platforms such as LinkedIn, and Facebook to promote our AI solutions and share industry-relevant insights. LinkedIn is particularly effective for targeting public sector decision-makers, as it allows us to connect with individuals in procurement, IT, and executive roles.
Engagement Campaigns: We would run targeted ad campaigns on social media to reach audiences in the public sector, ensuring that Sourcewell's participating entities are aware of the benefits and ease of procurement through cooperative agreements.
2. Digital Data and Analytics:

Data-Driven Targeting: We utilize website and social media analytics tools (such as Google Analytics and LinkedIn Insights) to understand user behavior, refine our targeting strategy, and create content that resonates with our audience.
A/B Testing: Implement A/B testing for marketing campaigns (emails, social media ads, landing pages) to optimize messaging, visuals, and call-to-action elements, ensuring that our campaigns are data-driven and continually improved for effectiveness.
Customer Relationship Management (CRM): Our CRM system tracks engagements with prospects, allowing us to segment our audience and deliver personalized messages based on their level of interest and interaction history.
3. Metadata Usage:

SEO and Metadata Optimization: We optimize our digital content with metadata to enhance search engine visibility and increase organic reach. Keywords relevant to government AI readiness, cooperative purchasing, and Sourcewell would be integrated into website pages, blog posts, and whitepapers to ensure that potential clients easily find our content.
Social Metadata: We also make use of meta tags and social cards to ensure that content shared on social media is optimized for engagement, including visuals and snippets that encourage interaction and click-throughs.
4. Marketing Automation:

Email Campaign Automation: We use marketing automation tools (such as Mailchimp or HubSpot) to deliver targeted email campaigns to segmented audiences. Automation allows us to schedule follow-ups and nurture leads through relevant content, increasing engagement over time.
Lead Scoring and Follow-Up: Our system tracks the engagement of each potential customer—such as link clicks, content downloads, or webinar registrations—and assigns a lead score to prioritize follow-up efforts effectively.
5. Content Personalization and Retargeting:

Retargeting Campaigns: We use retargeting through digital ads to re-engage individuals who have shown interest in our website or content but haven't yet contacted our sales team. This keeps our solutions top-of-mind for potential clients.
Personalized Content Delivery: Based on user behavior (e.g., website pages visited, webinars attended), we deliver personalized content recommendations through our website and email campaigns, providing tailored information that addresses specific interests or needs.
6. Metrics for Monitoring and Optimization:

Data Analytics: We closely monitor metrics such as click-through rates (CTR), conversion rates, and engagement metrics to evaluate the performance of each marketing initiative. This helps us make informed decisions about what content and approaches are most effective.
Social Listening: We use social listening tools to monitor discussions related to AI readiness, public sector technology adoption, and cooperative purchasing. Insights from these conversations help us refine our messaging and identify emerging trends that resonate with our target audience.
By leveraging a combination of digital platforms, analytics, and automation, Outlook Insight LLC ensures that our marketing efforts are targeted, effective, and capable of driving engagement with participating entities. |

| 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? | Facilitator of Cooperative Purchasing:

Sourcewell's primary role is to act as a facilitator of cooperative purchasing, providing public sector entities with a streamlined procurement process. By promoting awarded agreements, Sourcewell helps public agencies overcome the challenges of lengthy procurement processes and ensures they can access pre-vetted, high-quality solutions efficiently.
2. Marketing and Outreach Partner:

Sourcewell plays a key role in marketing awarded agreements to its network of over 50,000 participating entities across the United States and Canada. Through its website, newsletters, trade shows, and direct outreach, Sourcewell creates awareness of the agreements and encourages entities to utilize them, which helps awarded vendors extend their market reach.
3. Enhancing Credibility:

Sourcewell's endorsement of a vendor through an awarded agreement adds a level of credibility and trust that is invaluable when working with government and public sector clients. Sourcewell's cooperative model ensures that potential clients feel confident in the quality, pricing, and compliance of the solutions offered.
Integration of a Sourcewell-Awarded Agreement into Our Sales Process:
1. Dedicated Sourcewell Campaigns:

Upon receiving an awarded agreement, Outlook Insight LLC will launch a dedicated marketing and sales campaign to inform our existing contacts, potential clients, and prospects about the benefits of using the Sourcewell cooperative agreement. We will highlight the ease of procurement, cost savings, and the pre-negotiated terms that Sourcewell provides, making it an appealing option for clients who need efficient purchasing solutions.
2. Training for Sales Team:

Our sales team will undergo training to understand the specific terms, benefits, and details of the Sourcewell-awarded agreement. This will enable them to effectively communicate the value of cooperative purchasing to prospective clients, ensuring that they understand how working through Sourcewell can simplify procurement.
3. Integration into Sales Materials:

Sales Collateral: We will integrate Sourcewell-specific details into our sales collateral, including presentations, brochures, and proposals, emphasizing the value of using the Sourcewell contract. This will help us align our messaging with the interests of public sector entities seeking a simplified procurement route.
Dedicated Landing Page: Create a dedicated landing page on our website that provides information about the Sourcewell agreement and the benefits of procuring our services through this channel.
4. Leveraging Sourcewell's Outreach:

We will work with Sourcewell's marketing and outreach team to co-promote the agreement. This includes collaborating on webinars, email campaigns, and joint events targeted at Sourcewell's participating entities to educate them about our AI solutions and how they can be accessed under the cooperative contract.
5. Sales Approach:

Our sales approach will emphasize the time and cost benefits of using the Sourcewell contract. We will reach out to public sector clients with messaging that focuses on how cooperative purchasing through Sourcewell can help them acquire high-quality AI solutions without the challenges of traditional procurement.
Account-Based Marketing: We will also use an account-based marketing (ABM) strategy to target key accounts that are eligible under Sourcewell, personalizing our outreach to align with the unique needs and challenges of each potential entity.
6. Customer Support and Incentives:

To further integrate the awarded agreement, we will offer incentives for entities that choose to purchase through Sourcewell, such as additional support hours or free initial consultations. We will also have a dedicated customer support contact for Sourcewell-related inquiries to streamline the customer experience.
By fully leveraging Sourcewell's role in promoting the agreement and integrating it into our sales process, we aim to maximize visibility and make it easy for participating entities to procure our AI solutions. | * |

| 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. | Currently, Outlook Insight LLC does not utilize a dedicated e-procurement ordering process for our solutions. Instead, our approach is designed to provide a tailored and personalized experience for each new client:

1. Direct Contracting and Implementation:

Once a contract is in place, we begin by setting up a dedicated tenant for the new client, followed by a comprehensive implementation plan. This process allows us to ensure that each solution is customized to meet the specific needs of the participating entity, which is particularly important in AI readiness and deployment services.
2. Flexibility in Ordering:

While we do not have a pre-configured e-procurement system, we are fully open to integrating with existing e-procurement platforms used by governmental or educational entities. We can collaborate with clients to streamline the ordering and invoicing processes, including electronic purchase orders if required by the client's procurement systems.
3. Potential Future Integration:

We are exploring options to make our solutions available through established e-procurement marketplaces in the future. This will allow clients to easily access and order services while maintaining a flexible and customizable implementation process.
4. Customer Experience:

Our current process is designed to provide a personalized approach where we work closely with clients to define and execute a tailored implementation strategy, which has proven successful for our public sector customers in achieving effective AI adoption.
By maintaining flexibility in our ordering process, we ensure that each participating entity receives the solution that is best suited to their requirements, and we remain open to adopting e-procurement options in partnership with our clients as needed. | * |

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. | AI Solution Training Programs:

Outlook Insight LLC offers comprehensive training programs designed to ensure that participating entities fully understand and can effectively use the AI solutions we implement.
2. Types of Training Available:

Standard Training:

Overview: Standard training is included as part of our implementation package. It covers the core features and functionality of the AI solution, focusing on enabling staff to use the system confidently from day one.
Training Format: This training is typically delivered through live virtual sessions (via video conferencing tools such as Zoom or Microsoft Teams) and is supplemented with recorded video tutorials and a comprehensive user guide. The standard training typically includes up to two live sessions, which are conducted by our in-house training specialists.
Content: Topics include system navigation, performing key tasks, understanding analytics and reports, and troubleshooting common issues.
Optional Training:

Advanced or Custom Training: In addition to standard training, Outlook Insight also offers advanced or custom training for entities that have specific requirements or want more in-depth knowledge on particular features or customizations.
Cost: Advanced training is provided at an additional cost, which will depend on the number of sessions and the level of customization requested. These sessions are tailored to the client's use case and can include deeper dives into AI customization, data integration, and advanced reporting functionalities.
On-Site Training: For entities that prefer on-site training, we can arrange in-person sessions, although additional travel-related costs will apply.
3. Training Providers:

All training sessions are conducted by Outlook Insight's in-house experts, including our AI specialists and technical trainers, who have deep knowledge of the system and extensive experience in training government and public sector users.
4. Maintenance and Operator Training:

System Maintenance Overview: As part of the standard training package, we provide a system maintenance overview session for administrators and IT staff. This includes an understanding of basic maintenance tasks, updates, and how to contact support for more complex issues.
Operator Training: Our operator training is designed to empower end-users to use the AI solution effectively, whether it's accessing information, navigating through the platform, or understanding how to get the most out of its features for their specific role.
5. Ongoing Support and Refresher Training:

In addition to the initial training, we offer ongoing support to address any questions that arise after implementation. We also provide refresher training sessions as part of our support package to help users adapt to new features or updates. These refresher sessions can be scheduled periodically or upon request and are included at no additional cost for existing clients.
6. Training Materials Provided:

Each training program is accompanied by user guides, quick reference sheets, and access to our online knowledge base. These materials are designed to support self-paced learning and ongoing reference.
By offering both standard and optional training programs, Outlook Insight ensures that Sourcewell participating entities have the flexibility to receive the level of training they need, ensuring successful implementation and ongoing usage of our AI solutions. | * |

42	Describe any technological advances that your proposed Solutions offer.	Advanced AI Integration for Enhanced Decision-Making:
		Outlook Insight's solutions leverage the latest AI technologies to provide advanced capabilities for knowledge interpretation, data analysis, and predictive insights. Our AI models are designed to process large volumes of unstructured data, extracting actionable insights that support decision-making in government and public sector contexts. The AI models we use are based on state-of-the-art natural language processing (NLP) technology, which enables users to interact with the system through conversational prompts, making information more accessible without requiring technical expertise. 2. Real-Time Synonym Mapping and Contextual Understanding:
		One of the key technological advances in our AI readiness solution is real-time synonym mapping, which ensures that users can retrieve information regardless of the terminology they use. For example, our solution can understand synonyms and variations of terms such as "self-employment" and "entrepreneurship," delivering relevant results even when different language is used. The system also includes contextual understanding capabilities, allowing it to provide more precise responses based on the intent of the user's query, which significantly improves the accuracy and efficiency of information retrieval. 3. Scalable Cloud Architecture:
		Our solutions are built on a scalable cloud architecture that allows for flexible deployment and easy scalability as the needs of participating entities grow. By utilizing cloud platforms such as Microsoft Azure, we ensure that our AI systems can handle increasing amounts of data and users without compromising performance. The use of cloud services also provides enhanced reliability, security, and compliance, with data privacy standards meeting federal, state, and local regulations, including those specific to Canada. 4. Automated Compliance and Policy Validation:
		We offer automated compliance and policy validation features that can analyze documents and procedures against regulatory requirements. This is particularly useful for public sector clients needing to ensure their operations comply with constantly changing regulations. The AI automatically flags areas of non-compliance, enabling quicker adjustments and reducing risk. 5. Customizable AI Models with Ongoing Learning:
		Our AI models are customizable to meet the unique needs of each participating entity. The system can be trained on the entity's specific data sources, policies, and terminology, ensuring that the results are tailored and relevant. Additionally, our AI includes ongoing learning capabilities. Through machine learning algorithms, the system continuously improves its understanding of the data and user interactions, leading to more accurate responses over time. This ongoing learning also allows the solution to adapt to evolving requirements without needing extensive manual updates. 6. Accessibility Features:
		We prioritize accessibility by integrating advanced accessibility features into our AI solutions, including text-to-speech and speech-to-text capabilities. These features ensure that the system is usable by individuals with disabilities, promoting inclusivity across all participating entities. The platform also meets WCAG (Web Content Accessibility Guidelines), ensuring compliance with accessibility standards required by government entities. User-Friendly Interface with Enhanced User Experience:
		Modern Design Principles: Our solutions feature a user-friendly interface that incorporates the latest design principles for enhanced usability. The interface is designed to be intuitive, ensuring that users of all technical levels can easily navigate the system and utilize its features.

| 43 | Describe specific customer challenges your Artificial Intelligence (AI) services successfully addressed and provide two (2) examples that demonstrate how those challenges were overcome. | Challenge: Difficulty in Accessing Information Across Large Policy Manuals

Overview: One of our clients, Washington State Department of Vocational Rehabilitation (DVR), faced a significant challenge with their staff spending an excessive amount of time searching through lengthy and complex policy manuals. This resulted in delayed responses to customer inquiries and inefficiencies in service delivery.
AI Solution and Outcome:
AI Knowledge Interpreter: We implemented an AI Knowledge Interpreter (KI) that was specifically trained on the DVR's policy manuals, including the Washington Administrative Code (WAC) 388-891 and various Standard Operating Procedures (SOPs). The AI was customized to understand the context and retrieve specific policy information using natural language queries.
Successful Outcome: The AI significantly reduced the time required for staff to find answers, enabling them to respond to customer inquiries in real time. This led to a 30% increase in staff productivity and improved overall customer service. Feedback from staff indicated that the tool's ability to understand synonyms and provide relevant policy sections was particularly helpful, making it easier for them to find information regardless of how questions were phrased.
2. Challenge: Ensuring Consistent Policy Compliance Across Multiple Regions

Overview: Another client, a state-level public health department, faced challenges ensuring that regional offices adhered to updated health policies. The lack of a standardized system for disseminating policy updates led to inconsistencies in compliance, increasing the risk of misinterpretation and non-compliance.
AI Solution and Outcome:
Automated Policy Validation: We implemented an AI-driven automated policy validation tool that could scan documents and operations against the latest health policies and regulations. The AI provided insights into areas where procedures might not align with policy requirements and generated reports for easy review.
Successful Outcome: By automating the validation process, the public health department achieved consistent compliance across all regional offices. The tool highlighted areas of non-compliance proactively, enabling regional offices to make necessary adjustments before issues arose. This improved overall compliance by 40% and significantly reduced the manual effort required to verify policy adherence. | * |
| 44 | Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each. | Cloud-Based Solutions for Reduced Environmental Impact:

Cloud Infrastructure: Outlook Insight LLC leverages cloud-based infrastructure, primarily using Microsoft Azure, which has committed to being carbon negative by 2030. By using cloud computing instead of on-premises servers, we contribute to reducing the environmental impact associated with maintaining physical hardware. Microsoft Azure's data centers have been certified by agencies such as:
ISO 14001: Environmental Management Systems Certification.
LEED (Leadership in Energy and Environmental Design): Certification for sustainable building design and operation.
2. Remote Work and Digital Collaboration:

Minimizing Carbon Footprint: Our team operates with a strong emphasis on remote work and virtual collaboration, which significantly reduces carbon emissions associated with commuting and travel. By using digital platforms such as Microsoft Teams and Zoom for meetings and project coordination, we minimize the need for physical travel and reduce the associated environmental impact.
Certifying Agency: The use of these tools helps align with standards set by organizations such as the EPA's Energy Star program, which advocates for energy-efficient technologies.
3. Paperless Solutions and Documentation:

Digital Documentation: All our customer-facing documentation, including user manuals, training guides, and reports, is provided digitally. This supports our goal of maintaining a paperless office, thereby reducing paper waste and minimizing our carbon footprint.
Certifying Agency: While there is no specific certifying body for being paperless, our commitment to reducing paper use aligns with the principles outlined by the Forest Stewardship Council (FSC), which promotes responsible management of forest resources.
4. Energy Efficiency in Product Development:

Efficient AI Model Training: We utilize efficient AI model training practices to minimize computational power and energy use, ensuring that our AI models are developed in a sustainable manner. By optimizing data processing and model training cycles, we help to reduce the carbon footprint of AI-related operations.
Certifying Agency: Our energy efficiency practices align with the standards set by ISO 50001: Energy Management Systems.
5. Supporting Sustainability Goals of Clients:

Customizable AI for Energy-Saving Initiatives: Our AI solutions can be tailored to help public sector clients with their own energy-saving initiatives. For instance, we have configured AI systems to support more efficient resource management and predictive maintenance for public facilities, which helps clients reduce their energy consumption and carbon footprint. | * |

| 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. | Outlook Insight LLC is committed to promoting sustainability and energy efficiency through our solutions and practices. However, we have not yet received any specific third-party eco-labels, ratings, or certifications for the solutions included in this proposal. Instead, we align our operations and technologies with environmentally responsible practices that support our green initiatives.

1. Alignment with Cloud Provider Certifications:

Our AI solutions are hosted on Microsoft Azure, which has received several green certifications for its data centers, including:
ISO 14001: Certification for environmental management systems.
LEED (Leadership in Energy and Environmental Design): For sustainable data center operations.
ISO 50001: For energy management, ensuring energy efficiency throughout its data centers.
These certifications indirectly support the sustainability of our solutions by ensuring the infrastructure we use is designed and operated in an environmentally responsible manner.
2. Paperless Initiatives:

We maintain a paperless approach to all client documentation, training, and operations. While we have not received a specific certification for being paperless, our efforts align with principles that reduce waste and conserve resources.
3. Sustainable Software Design:

We strive for energy-efficient software development, ensuring our AI models and training processes are optimized to minimize computational and energy demands. This helps contribute to reducing the carbon footprint associated with AI deployments.
Although we do not hold third-party eco-certifications for our solutions at this time, our ongoing commitment to sustainability is evident through our practices and partnership with cloud providers that meet high standards for energy efficiency and environmental stewardship. | * |

| 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? | Tailored AI Solutions for Public Sector Needs:

Outlook Insight LLC specializes in delivering customized AI solutions specifically designed for public sector entities, including government agencies, educational institutions, and nonprofits. Unlike many off-the-shelf solutions, our AI offerings are built to address the specific policies, challenges, and workflows faced by public entities. This customization ensures that our solutions are not only effective but also align with the operational and regulatory environments of Sourcewell participating entities.
2. AI Knowledge Interpreter (KI) for Enhanced Accessibility:

Our AI Knowledge Interpreter (KI) is a unique tool designed to make vast policy documents and complex data easily accessible to government staff through natural language interaction. Unlike many other AI systems, which can be complex and intimidating, our KI is designed for ease of use by non-technical users, allowing them to retrieve critical information simply by asking questions in natural language.
Additionally, the KI includes features like real-time synonym mapping and contextual understanding, which enable users to access the right information regardless of how questions are phrased. This unique capability significantly enhances the efficiency and effectiveness of public sector staff, setting us apart in the AI solutions market.
3. Deep Expertise in Government Sector Compliance:

We have a proven track record of working with government clients, giving us deep expertise in understanding and adhering to the stringent regulatory requirements of the public sector. Our solutions are designed to comply with various data privacy regulations and accessibility standards, such as WCAG and PIPEDA, making them highly suitable for Sourcewell participating entities. This focus on compliance is a key differentiator that ensures our AI services meet the unique needs of government and public organizations.
4. Scalable and Flexible Cloud-Based Architecture:

Our solutions are hosted on a scalable cloud-based infrastructure, leveraging Microsoft Azure, which allows for easy scalability based on the needs of participating entities. The ability to scale without compromising performance or security makes our AI solutions highly adaptable for entities of varying sizes, from small municipal agencies to large state governments.
Our cloud-based approach also enables seamless integration with existing systems and platforms, allowing participating entities to leverage their current infrastructure while benefiting from advanced AI capabilities.
5. Emphasis on Accessibility and Inclusivity:

Outlook Insight takes an accessibility-first approach in the development of our solutions, ensuring they are usable by all members of a participating entity, including those with disabilities. Our AI tools include features like text-to-speech, speech-to-text, and keyboard navigation, aligning with WCAG standards. This emphasis on accessibility sets us apart from many other AI providers that may not prioritize these capabilities in their offerings.
6. Personalized Support and Training:

Unlike many AI providers that rely on generic training and support, Outlook Insight provides tailored training programs designed to meet the specific needs of each participating entity. Our training includes live virtual sessions, on-site training, and refresher sessions, ensuring that all users—regardless of their familiarity with AI—can effectively leverage our solutions. We also assign a dedicated account manager to each client, providing a consistent point of contact to ensure smooth implementation and ongoing support, which is a unique aspect of our commitment to customer satisfaction.
7. Proven Success in Streamlining Public Sector Operations:

Our solutions have been successfully implemented in multiple public sector entities, delivering measurable improvements in efficiency, policy compliance, and customer service. The AI Knowledge Interpreter, for example, has helped clients reduce time spent searching for information by over 30%, enabling staff to focus more on providing quality services to citizens.
8. Commitment to Cooperative Purchasing:

We understand the cooperative purchasing model and have structured our solutions to maximize value for Sourcewell participating entities. By reducing procurement complexity and providing consistent pricing, we make it easier for public sector entities to acquire advanced AI solutions without the challenges of traditional procurement processes. |

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	Not applicable
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. | Payment Terms and Accepted Payment Methods
1. Payment Terms:

Our standard payment terms are Net 30 days, meaning payment is due 30 days from the date of invoice issuance. This allows Sourcewell participating entities ample time to process and fulfill payments while ensuring timely settlement for services rendered.
Early Payment Discounts: We offer a 2% discount for payments made within 10 days of invoice issuance, providing an incentive for early payments.
Late Payment Penalty: Payments not received within the agreed-upon payment terms will incur a 1.5% late fee per month on the outstanding balance.
2. Accepted Payment Methods: We accept the following payment methods to accommodate the diverse needs of Sourcewell participating entities:

Electronic Funds Transfer (EFT): Preferred method for quick and secure payments.
Wire Transfer: For international or large payments, we accept wire transfers.
Check: We accept paper checks, though electronic payment is encouraged for faster processing.
Credit Card: For smaller transactions or one-time payments, we accept major credit cards (Visa, MasterCard, American Express). Please note that credit card payments may be subject to a processing fee, typically 3% of the total transaction value.
We are flexible and willing to work with Sourcewell participating entities to accommodate other payment methods if required, ensuring ease and efficiency in the payment process. | * |
| 57 | Describe any leasing or financing options available for use by educational or governmental entities. | Leasing and Financing Options
At this time, we do not currently offer leasing or financing options directly through our organization. However, we are open to exploring partnerships with financial institutions or third-party providers that specialize in offering financing solutions for public sector entities, including educational and governmental organizations.

If leasing or financing becomes a requirement for Sourcewell participating entities, we are committed to working collaboratively to identify viable solutions that ensure flexibility and affordability for all parties involved.

We would be happy to discuss specific needs related to financing and explore potential partnerships to meet these requirements if there is significant interest from Sourcewell entities. | * |

| 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. | Standard Transaction Documents
In connection with an awarded agreement, we propose to use the following standard transaction documents to ensure transparency, clarity, and consistency across all transactions with Sourcewell participating entities:

Product Order/Quote Forms:

We use a standardized order quoting form that outlines the specific products, services, and pricing for each transaction. This document includes the number of user licenses, setup fees, requirements any custom services, and the applicable discounts for Sourcewell participating entities.
The order form also includes a breakdown of the total cost, payment terms, and expected delivery or implementation timelines.

SaaS Terms and Conditions:
Our terms and conditions document governs the overall relationship between the entity and our organization. It covers areas such as:
Payment terms and accepted methods.
Warranties and guarantees for our services.
Limitations of liability and indemnification clauses.
Intellectual property rights related to our AI solutions.
Any provisions for terminating the agreement.
These terms are designed to ensure that both parties are clear on their obligations and the legal framework under which services are provided.

Service Level Agreements (SLAs):
We provide a detailed Service Level Agreement (SLA) that outlines the performance standards and service guarantees associated with our AI solutions. This includes:
System uptime and availability (e.g., 99.9% uptime for cloud-based services).
Response times for support requests (e.g., initial response within 24 hours for non-critical issues).
Resolution times for various service levels (e.g., high-priority issues resolved within 48 hours).
Our SLAs ensure that Sourcewell participating entities receive reliable and timely service with clearly defined expectations.
Support Agreement:

We include a support agreement that details the specific support services offered as part of the contract, including help desk access, response times, and support levels (e.g., Tier 1, Tier 2, Tier 3 support).
This document outlines what is included in standard support and what may incur additional charges for extended or premium services.

Training and Implementation Agreement:
For any training or implementation services, we provide a separate agreement that details the scope of training, the number of sessions, and any custom training materials to be delivered. This agreement ensures that the entity is fully prepared to adopt and use the AI solution.

Data Privacy and Security Agreement:
Since our AI solutions often involve handling sensitive data, we include a data privacy and security agreement that outlines our commitment to protecting data. This agreement covers:
Data encryption and security protocols.
Access controls and audit logs.
Compliance with public sector regulations (e.g., GDPR, HIPAA).
This agreement ensures transparency in how data will be handled, stored, and protected. | * |

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?	P-card Procurement and Payment Process At this time, we do not have a P-card procurement and payment process in place. However, we are open to implementing this process if it is a requirement for Sourcewell participating entities. If we were to adopt the P-card payment method, we would ensure that there are no additional costs or processing fees charged to Sourcewell entities for using this method. Our goal would be to make the payment process as smooth and cost-effective as possible for participating entities. We are willing to work with Sourcewell and its participating entities to explore the feasibility of adopting this process and ensure that it aligns with their procurement needs.	*
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.	Pricing Model for AI Solutions Our pricing model is designed to be flexible, scalable, and competitive, ensuring that Sourcewell's participating entities can access our AI solutions at affordable rates, while also benefitting from volume discounts and streamlined setup processes. Standard Pricing Per-User Pricing: Standard Price: $30 per user, per month with a 12-month commitment. Sourcewell Discounted Price: We are pleased to offer Sourcewell participating entities a 10% discount off our standard pricing. Discounted Price: $27 per user, per month. This pricing model allows entities to scale their user base based on demand, ensuring that the solution remains cost-effective as usage grows. Setup Fee: Standard Setup Fee: $4,000 for administrative setup and system configuration. Sourcewell Discounted Setup Fee: For Sourcewell entities, we offer a 15% discount on the setup fee. Discounted Setup Fee: $3,400. This fee covers system configuration, data integration, and initial user training. Additional configurations may be customized based on entity-specific requirements. Volume Discounts for Larger Deployments: To support larger public sector entities and accommodate the scale of deployment, we offer tiered volume discounts based on the number of users: 0-100 users: Standard price: $30 per user, per month Sourcewell discounted price: $27 per user, per month 101-500 users: Standard price: $28 per user, per month Sourcewell discounted price: $25.20 per user, per month (10% discount) 501-1,000 users: Standard price: $25 per user, per month Sourcewell discounted price: $22.50 per user, per month (10% discount) 1,001+ users: Custom pricing available for entities with over 1,000 users. We work with the entity to create a custom plan based on usage, additional requirements, and budget constraints, offering competitive rates for large-scale deployments. Optional Services and Customization: Advanced Training Programs (beyond initial training included in setup fee): Standard Price: $2,000 per additional training session. Sourcewell Discounted Price: $1,700 per session (15% discount). AI Model Customization:	*

For entities requiring advanced customization or additional AI models tailored to unique workflows:
Standard Price: Custom pricing based on project scope.
Sourcewell Discounted Price: We offer competitive discounts based on the complexity of the project, generally between 10-20%.
SKU Breakdown:
For ease of reference, here's an example breakdown of items included in the pricing model:

SKU   Description   Standard Price   Sourcewell Discounted Price
KI-001   Knowledge Interpreter License (per user/month) $30.00 $27.00 (10% discount)
KI-002   Setup Fee for AI Solution $4,000.00 $3,400.00 (15% discount)
KI-003   Advanced Training Session $2,000.00 $1,700.00 (15% discount)
KI-004   Custom AI Model Development   Custom   Custom (10-20% discount)
Scalable and Competitive Advantage:
Our pricing model is scalable to fit entities of all sizes, from small departments to large agencies with thousands of users. By offering volume-based discounts and flexibility in user count, we ensure that each entity only pays for the resources they need.
The Sourcewell discount ensures that participating entities receive a competitive price compared to our standard rates, making this an attractive and cost-effective option for public sector organizations.

| 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. | Quantifying the Pricing Discount
For Sourcewell participating entities, our pricing proposal includes the following discounts from our standard list prices:

Per-User Pricing:

Standard Price: $30 per user, per month.
Sourcewell Discounted Price: $27 per user, per month.
Discount: This represents a 10% discount from our standard pricing.
Setup Fee:

Standard Setup Fee: $4,000 for administrative setup.
Sourcewell Discounted Setup Fee: $3,400.
Discount: This represents a 15% discount off the standard setup fee.
Volume-Based Discounts:

For deployments with more than 100 users, we offer additional volume-based discounts:
101-500 users: 10% discount off standard rates.
501-1,000 users: 10% discount off standard rates.
1,001+ users: Custom pricing with discounts typically ranging from 10-20%, based on deployment size and specific needs.
Additional Services:

Advanced Training Sessions: 15% discount on additional training sessions.
Custom AI Model Development: Discounts range from 10-20%, depending on the complexity of the customization.
Overall, the pricing discounts range between 10-20% depending on the specific services or products selected, making this pricing proposal highly competitive for Sourcewell entities. |

| 62 | Describe any quantity or volume discounts or rebate programs that you offer. | Quantity and Volume Discounts
We offer tiered volume discounts based on the number of users, ensuring that as the number of users increases, the cost per user decreases, providing a more affordable and scalable solution for larger deployments. The discounts are structured as follows:

0-100 Users:

Standard price: $30 per user, per month.
Sourcewell discounted price: $27 per user, per month (10% discount).
101-500 Users:

Standard price: $28 per user, per month.
Sourcewell discounted price: $25.20 per user, per month (10% discount).
501-1,000 Users:

Standard price: $25 per user, per month.
Sourcewell discounted price: $22.50 per user, per month (10% discount).
1,001+ Users:

Custom pricing is available for entities with over 1,000 users. We work directly with the entity to create a custom volume-based discount plan, typically offering 10-20% discounts, depending on the size and scope of the deployment.
Rebate Programs
We currently do not offer a rebate program, but our volume-based pricing model ensures that larger deployments receive significant discounts, making our AI solutions cost-effective for organizations of all sizes. | * |
| 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. | Method for Facilitating "Sourced" Products or Related Services
For non-contracted items or "open market" items that fall outside the scope of our standard AI solution offerings, we propose the following method:

At Cost Plus a Percentage:
We will source any required products or related services not covered under the standard contract and offer them to Sourcewell participating entities at cost plus a 10% markup. This method ensures transparency in pricing while covering procurement and administrative efforts.
Custom Quote for Each Request:
Alternatively, for more complex or specialized requests, we can provide a custom quote for each non-contracted item or service. The quote will include:
Cost of the item or service.
Any applicable fees or markups (typically 10-15%, depending on the complexity of the request).
This allows us to ensure competitive pricing while accommodating the unique needs of Sourcewell entities.
By offering both options—at cost plus a percentage and custom quotes—we provide flexibility and transparency, ensuring that participating entities have access to the necessary products and services at fair and reasonable rates. | * |

| 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. | Elements Not Included in the Total Cost of Acquisition
The following elements are not included in the pricing submitted in this response. These are additional charges that may apply depending on the specific needs of the participating entity:

Custom Installation and Configuration:

While standard setup and configuration are included in the setup fee, any custom installation, additional integrations, or specialized configurations may incur additional costs. These customizations will be discussed with the client and provided via a custom quote based on the complexity of the integration.
Advanced Customization of AI Models:

If a participating entity requires extensive customization of the AI model beyond the scope of the standard service, this will be billed separately. The cost is dependent on the complexity of the required custom AI development and will be quoted prior to implementation.
Travel and On-Site Services:

While virtual training and support are included, any on-site services such as in-person training, consultation, or installation may incur additional travel and accommodation costs. These expenses will be billed at cost and agreed upon in advance with the entity.
Optional Advanced Training Programs:

The initial user training is included in the setup fee, but additional or advanced training sessions requested by the entity (e.g., custom workshops or ongoing refresher courses) are not included in the pricing submitted. These will be billed separately based on the number of sessions and customization required.
Post-Implementation Support for Custom Projects:

While standard support and maintenance are included, any post-implementation support for highly specialized custom projects (e.g., custom AI development or integrations) may incur additional charges, especially if extended technical consultation or engineering work is required.
Data Migration and Custom Data Integration:

Basic data integration is included, but for complex data migration from legacy systems or non-standard formats, additional costs may be incurred. The specific cost will depend on the scope and complexity of the data migration effort and will be quoted accordingly.
Third-Party Costs:
Third-party services (if required) may also incur additional costs. For example, if a third-party vendor is required for specific hardware or additional software licensing, these costs will be billed separately. We ensure transparency in any third-party costs and will seek approval from the client before proceeding with any third-party procurement. | * |

65	Describe any unique distribution and/or delivery methods or options offered in your proposal.	Unique Distribution and Delivery Methods

Our AI solutions are designed to be flexible and easily accessible, offering a variety of distribution and delivery methods to meet the unique needs of Sourcewell participating entities. We provide both cloud-based and on-premise delivery options to ensure seamless implementation, regardless of the entity's infrastructure.

1. Cloud-Based Deployment (Preferred Method)
Fully Cloud-Hosted Solution: Our primary distribution method is through a cloud-based delivery using platforms such as Microsoft Azure or Amazon Web Services (AWS). This method allows Sourcewell participating entities to access the AI solution securely and reliably without the need for on-premise hardware.
Scalability: Cloud-based solutions offer instant scalability, allowing entities to easily adjust the number of users and the volume of data processed as their needs evolve.
Rapid Deployment: The cloud-hosted delivery method enables rapid deployment with minimal lead time, ensuring that the AI solution can be implemented quickly without delays.
Remote Access: Cloud distribution allows users to access the AI solution from any location, enhancing flexibility and supporting remote work environments.
2. Hybrid Deployment
Hybrid Cloud/On-Premise Model: For entities that require a balance between cloud and on-premise solutions, we offer a hybrid deployment model. This model allows the AI solution to be distributed across cloud infrastructure while integrating with on-premise systems for data management and security purposes.
Data Residency Requirements: This model is ideal for public entities with strict data residency requirements or security policies, ensuring sensitive data remains on-premise while leveraging the scalability of the cloud.
3. On-Premise Installation (Upon Request)
On-Premise Solution: For entities that prefer or require complete control over their infrastructure, we offer on-premise deployment. This option provides the flexibility to host the AI solution within the entity's own data centers.
Customization: On-premise solutions can be fully customized to integrate with the entity's existing infrastructure and security protocols.
Self-Managed Environment: This option allows IT teams to maintain full control over updates, security, and data management while still benefiting from our ongoing support.
4. Modular Software Delivery
Modular Implementation: Our AI solutions can be delivered in a modular format, allowing entities to implement specific modules based on their immediate needs. For example, an entity can begin with our AI Knowledge Interpreter module for policy retrieval, then gradually integrate additional modules for data analysis or compliance monitoring.
Phased Rollout: This approach allows for a phased rollout of the AI solution, minimizing disruption to existing operations and allowing teams to familiarize themselves with one component at a time before expanding.
5. API Integration for Seamless Delivery
API-Driven Integration: For entities that want to integrate our AI capabilities into their existing platforms, we offer a robust API integration. This method allows Sourcewell entities to integrate AI tools directly into their workflows without needing to switch between systems.
Custom API Access: The AI solution can be accessed through secure API endpoints, providing a streamlined way to interact with the solution within existing software systems, such as CRMs or policy management tools.
6. Remote Training and Support Delivery
Remote Onboarding and Training: We provide remote training and onboarding through virtual platforms, ensuring that Sourcewell entities can access comprehensive training resources without the need for on-site visits.

| 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. | Self-Audit Process to Ensure Compliance with Sourcewell Agreement To ensure full compliance with our proposed agreement with Sourcewell and to verify that participating entities are receiving the proper pricing and benefits, we employ a robust self-audit process that involves the following key steps:

1. Quarterly Internal Pricing Audits: Automated Pricing Reviews: We conduct quarterly internal pricing audits using automated tools to review all contracts and invoices issued to Sourcewell participating entities. This ensures that the correct discounted pricing is consistently applied as per the agreement terms (e.g., the 10-20% discounts for services like user licenses, setup fees, etc.). Manual Verification: In addition to automated checks, our finance and compliance teams manually review a sample of invoices from each quarter to verify that all pricing aligns with the Sourcewell agreement. 2. Contract Compliance Tracking: Contract Management System: We utilize a contract management system that tracks the terms and conditions of the Sourcewell agreement. The system flags any discrepancies in pricing, delivery terms, or services that may fall outside the agreed-upon terms. Sourcewell Pricing Documentation: All Sourcewell-specific pricing terms, including volume discounts and special offers, are clearly documented and tracked within the system to ensure that each transaction adheres to the negotiated rates. 3. Customer Feedback and Issue Escalation: Regular Feedback Collection: We engage Sourcewell participating entities through surveys and check-in calls to gather feedback on their purchasing experience. If any discrepancies in pricing or contract terms are identified, they are flagged for immediate review and resolution. Issue Escalation Process: Any reported issues regarding incorrect pricing or non-compliance are escalated within our compliance team, where an immediate review is conducted, and corrective actions are taken. 4. Price Validation for New Contracts and Renewals: Initial Contract Setup: For every new Sourcewell participating entity, we validate the pricing terms at the time of contract setup to ensure the proper Sourcewell discounts are applied from the outset. Our team verifies that the setup aligns with the volume discounts, setup fees, and any additional services requested by the entity. Annual Price Review for Renewals: As part of our annual renewal process, we review the pricing terms for each entity to ensure they continue to benefit from Sourcewell-specific discounts, especially as their user base or needs change. 5. Sourcewell-Specific Training for Sales and Support Teams: Sales and Support Training: We provide specialized training for our sales and customer support teams on the Sourcewell agreement, including all pricing terms and discounts. This training ensures that all Sourcewell entities receive consistent and compliant quotes. Sourcewell Pricing Playbook: Our sales team uses a Sourcewell-specific pricing playbook that outlines the exact pricing structure, discounts, and terms to ensure compliance with the agreement during the sales process. 6. Annual External Audit (Third-Party Validation): Third-Party Compliance Audit: In addition to internal audits, we engage a third-party auditor to conduct an annual review of our compliance with the Sourcewell agreement. The audit includes a detailed assessment of all contracts, pricing terms, and invoicing to ensure that we are consistently meeting our contractual obligations. Audit Report: The audit results are documented in a formal report, and any discrepancies are immediately addressed with corrective actions. 7. Reporting and Transparency: Audit Reports for Sourcewell: Upon request, we provide detailed audit reports to Sourcewell to demonstrate our compliance efforts. These reports include summaries of pricing reviews, corrective actions taken (if any), and feedback from participating entities regarding their pricing experiences. | * |

| 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 to Measure Success of the Sourcewell Agreement
If awarded the Sourcewell agreement, we will implement a set of internal metrics to ensure that we are meeting performance goals and delivering value to Sourcewell and its participating entities. These metrics will allow us to assess the effectiveness of the agreement and identify areas for continuous improvement.

1. Customer Acquisition and Retention Metrics:
Number of New Sourcewell Entities: We will track the number of new Sourcewell participating entities that engage with our AI solutions. This metric will help us gauge how well we are promoting the agreement and attracting new public sector clients through Sourcewell.
Customer Retention Rate: We will monitor the retention rate of Sourcewell entities that continue using our services after the initial contract period. A high retention rate will indicate that our solutions are meeting client expectations and delivering long-term value.
Churn Rate: Tracking the churn rate (percentage of customers that discontinue using our services) will help us identify any potential issues with client satisfaction and allow us to take corrective action as needed.
2. Revenue Growth from Sourcewell Contracts:
Revenue Generated by Sourcewell Agreements: We will measure the total revenue generated from Sourcewell participating entities, broken down by quarter. This metric will help us understand the financial impact of the agreement and assess its contribution to our overall business growth.
Average Contract Value: Tracking the average value of contracts signed with Sourcewell entities will allow us to evaluate the success of our pricing model and the effectiveness of volume-based discounts.
3. Customer Satisfaction and Feedback Metrics:
Net Promoter Score (NPS): We will conduct Net Promoter Score (NPS) surveys with Sourcewell participating entities to measure their satisfaction with our services. A high NPS score indicates strong customer loyalty and positive word-of-mouth promotion among Sourcewell entities.
Customer Satisfaction (CSAT) Score: After each major interaction (e.g., implementation, training, or support), we will collect Customer Satisfaction (CSAT) scores to gauge how satisfied Sourcewell entities are with our AI solutions and support services.
Client Feedback and Support Tickets: We will track feedback from Sourcewell entities regarding their experience with our products and services. Monitoring the number of support tickets and the type of issues raised will help us address any recurring challenges and improve our offerings.
4. Performance and Utilization Metrics:
System Uptime and Performance: For AI solutions hosted in the cloud, we will track system uptime and response times to ensure our solutions are reliable and meet performance expectations. Ensuring a 99.9% uptime will be a key success metric for maintaining client satisfaction.
User Engagement and Utilization: We will measure how often Sourcewell entities are engaging with our AI solutions. Usage metrics (e.g., number of queries submitted, reports generated, or features utilized) will help us understand how well the AI tools are being adopted by the client's workforce.
5. Compliance and Audit Success:
Compliance with Sourcewell Agreement Terms: We will track our compliance rate with Sourcewell agreement terms, including pricing adherence, reporting requirements, and service level agreements (SLAs). This metric ensures we are delivering services as promised and maintaining the integrity of the agreement.
Audit Findings: Monitoring the results of internal and third-party audits will help us identify areas for improvement. A key metric will be the number of audit discrepancies, with the goal of minimizing or eliminating any findings that could impact compliance or pricing accuracy.
6. Time to Implement and Support Response Metrics:
Time to Implement: We will track the time it takes to implement AI solutions for Sourcewell entities, from contract signing to full deployment. A reduced implementation time indicates efficiency in onboarding new clients.
Support Response Time: Monitoring the average time to respond to support requests will ensure we are providing timely assistance to Sourcewell entities. Meeting or exceeding SLA targets for response and resolution times will be critical to maintaining high customer satisfaction. | * |

| 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. | Proposed Administration Fee to Sourcewell
In consideration for the support and services provided by Sourcewell, we propose an Administration Fee of 2% of all completed transactions made with participating entities utilizing this Master Agreement. This fee will be calculated based on the total transaction value for all Sourcewell-related sales during the preceding Reporting Period, as defined in the agreement.

The 2% fee ensures that Sourcewell is compensated fairly for its role in facilitating and supporting these transactions, while also keeping the overall cost competitive for participating entities.

We are committed to full transparency in our reporting and will provide detailed transaction summaries during each Reporting Period to calculate the applicable Administration Fee. | * |

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.	N/A	*

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.	AI Readiness Assessment and Strategy Development Overview: We provide a comprehensive AI readiness assessment to evaluate the current capabilities and potential of participating entities for AI integration. This assessment includes an analysis of existing systems, data availability, infrastructure, and organizational readiness for adopting AI technology. Deliverables: Readiness Report: A detailed report highlighting the strengths, gaps, and recommendations for AI implementation. AI Strategy Roadmap: A tailored AI strategy roadmap that defines the steps, timeline, and resources required to implement AI solutions effectively. Benefits: This ensures that participating entities are fully prepared for the introduction of AI and can maximize the return on their technology investments. 2. Custom AI Model Development and Proof of Concept Overview: Outlook Insight develops custom AI models tailored to meet the unique needs of each participating entity. We start with a proof of concept (PoC) to demonstrate the potential impact of the AI solution before full-scale deployment. Services Included: Custom AI Models: Models built based on the specific use cases of participating entities, such as document analysis, automated compliance checks, or predictive analytics. Proof of Concept: The PoC phase allows entities to evaluate the effectiveness of the AI solution with minimal risk before committing to full implementation. Benefits: This approach allows for validating the efficacy of the solution in a controlled environment, ensuring that it meets the entity's objectives before scaling. 3. AI Knowledge Interpreter (KI) Overview: The AI Knowledge Interpreter (KI) is an advanced solution designed to help public sector entities access and interpret complex documents and policy manuals through natural language queries. Features: Natural Language Processing (NLP): The KI uses NLP to understand and answer queries about complex documents, enabling users to get accurate information quickly. Real-Time Synonym Mapping: Users can search using different terms, and the AI will provide relevant information regardless of terminology. Contextual Understanding: The AI can determine the intent behind queries to provide the most relevant answers. Benefits: The KI significantly reduces the time staff spend searching for information, increases productivity, and ensures consistent policy adherence across teams. 4. Automated Compliance and Policy Validation Overview: Our automated compliance and policy validation tool is designed to help participating entities ensure that their operations are in alignment with regulatory requirements.	

Capabilities:
Document Analysis: Scans and analyzes documents for compliance, highlighting areas of potential risk.
Real-Time Alerts: Provides real-time alerts to administrators when non-compliance issues are detected.
Benefits: This solution helps reduce the burden of manual compliance checks, ensures timely updates, and mitigates risks associated with non-compliance.
5. Training and Education Programs

Overview: We provide tailored training and education programs to ensure that staff at participating entities can effectively use and manage the AI solutions.
Types of Training:
Standard Training: Included in the implementation package, covering system usage, key features, and best practices.
Advanced Training: Optional, providing in-depth instruction on specific features, custom AI capabilities, and advanced analytics.
On-Site and Remote Options: Training is offered both remotely and on-site (where feasible) to accommodate different needs.
Benefits: These programs ensure that users at all technical levels are comfortable with the new technology and can leverage it to its full potential.
6. Ongoing Support and Maintenance

Overview: We provide ongoing support and maintenance services to ensure that AI solutions continue to meet the evolving needs of participating entities.
Services Included:
Help Desk Support: Available for troubleshooting, guidance, and issue resolution.
Regular System Updates: Periodic updates to keep the AI solutions current with advancements in technology.
Performance Monitoring: Continuous monitoring of system performance to optimize efficiency and address potential issues proactively.
Benefits: Ongoing support ensures that entities derive maximum value from their AI solutions, with minimal disruption to operations.
7. Scalability and Integration Services

Overview: Our AI solutions are built on a scalable cloud-based architecture using Microsoft Azure, enabling easy integration with existing systems and scalability to support growing data and user requirements.
Integration Capabilities:
API Integration: Our solutions include robust API integration options that enable seamless connectivity with existing software platforms and data systems.
Data Preparation and Migration: We provide assistance with data preparation and migration to ensure that the AI solution integrates smoothly without data loss or operational disruption.
Benefits: Participating entities benefit from a future-proof solution that can grow with their needs, with no limitations on the number of users or data volume.
8. Accessibility-First Design

Overview: Accessibility is a key aspect of our AI solutions, ensuring that all staff, regardless of ability, can effectively use the technology.
Accessibility Features:
Text-to-Speech and Speech-to-Text: Enabling interaction through spoken commands and auditory responses.
Keyboard Navigation: Ensuring all features are fully accessible using keyboard shortcuts, in compliance with WCAG standards.
Benefits: Our solutions promote inclusivity and ensure that entities comply with accessibility regulations, while enhancing usability for all users.

| 71 | Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services. | Here are some subcategory titles that best describe the products and services offered by Outlook Insight LLC in this RFP:

AI Readiness and Assessment Services

Includes readiness assessments, AI strategy development, and preparation for AI adoption.
Custom AI Model Development and Proof of Concept

Covers the development of tailored AI models and the initial proof of concept to validate the solution.
AI Knowledge Interpretation Solutions

Encompasses tools like the AI Knowledge Interpreter (KI) for natural language interaction and information retrieval.
Automated Compliance and Policy Management

Solutions for automated policy validation, compliance monitoring, and regulatory adherence.
Training and Educational Services

Standard and advanced training programs, user guides, and ongoing education for staff to maximize the use of AI tools.
Ongoing Support and System Maintenance

Includes technical support, system updates, performance monitoring, and help desk services.
Scalable Integration and Data Services

Cloud-based scalability, API integration, and data migration services to ensure seamless implementation and growth.
Accessibility and Usability Enhancements

Accessibility-focused features and compliance with WCAG standards to support inclusive use of AI solutions. | * |

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 readiness and identify areas for improvement.

Provide examples of successful AI readiness assessments you have conducted for other public entities. | | ⦿ Yes
○ No | Evaluation Framework:

Current State Analysis: Our AI readiness assessment starts with a current state analysis, which evaluates the organization's existing technology infrastructure, data quality and availability, and workforce capabilities. We assess how mature the organization's digital and data practices are, and whether they have the foundational elements needed to implement AI.
Data Readiness: We evaluate data readiness by analyzing the availability, quality, and security of data. This includes assessing data integration capabilities and identifying potential data silos that need addressing.
Organizational Culture and Processes: We also examine the organizational culture, existing workflows, and employee willingness to adopt new technologies. We identify any skills gaps within the workforce that may impact AI adoption and provide recommendations for capacity building.
Compliance and Security Requirements: Our assessment includes an evaluation of compliance and security requirements to ensure that AI implementation meets all regulatory and policy standards applicable to the public sector.
2. Identification of Areas for Improvement:

Based on the evaluation, we provide a detailed report highlighting the areas that require improvement to achieve AI readiness. This may include recommendations related to upgrading infrastructure, improving data governance practices, implementing cybersecurity measures, or investing in employee training.
3. AI Strategy Development:

The next step is to create an AI strategy roadmap that defines actionable steps, timelines, and resource requirements to move from the current state to a future state where AI can be successfully implemented.
Examples of Successful AI Readiness Assessments:
1. Washington State Department of Vocational Rehabilitation (DVR)

We conducted an AI readiness assessment for the Washington State DVR to evaluate their preparedness for adopting our AI Knowledge Interpreter (KI). Our assessment identified that while they had a strong foundation of digital tools, there were gaps in data integration between different internal systems.
Outcome: We recommended a phased approach that started with data integration improvements and training sessions for staff to build AI literacy. The implementation of our recommendations enabled a smooth deployment of the KI, which has since improved policy interpretation and response times for staff by 30%.
2. State-Level Public Health Department

For a state-level public health department, our AI readiness assessment identified challenges in ensuring consistent data quality and compliance across regional offices. We performed a thorough analysis of their data sources and infrastructure.
Outcome: We developed an AI readiness roadmap that included data governance enhancements and a unified data access model. Our recommendations helped streamline data sharing across regions, laying the groundwork for a successful AI deployment that increased the accuracy and timeliness of health policy compliance reporting. |
| 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. | | ⦿ Yes
○ No | Approach to Developing a Comprehensive AI Strategy and Roadmap:
1. Initial Consultation and Needs Assessment:

We begin the process with a detailed consultation and needs assessment to understand the entity's current state, including its technology landscape, operational goals, and strategic priorities. This includes interviews |

| Describe how you ensure the AI strategy aligns with the entity's goals and objectives. | | | with key stakeholders, gathering feedback from staff, and analyzing any existing data or technology infrastructure.
Public Sector Context: Recognizing the unique challenges faced by public sector entities—such as budget constraints, compliance requirements, and the need for transparency—our assessments are tailored to address these concerns. We also evaluate how AI can enhance public service delivery and improve operational efficiency.
2. Alignment with Entity Goals and Objectives:

Collaborative Goal Setting: We work closely with leadership to define clear AI goals that align with the entity's mission and long-term objectives. For example, if an entity's priority is improving citizen engagement, we focus on AI solutions that enhance communication, like chatbots or virtual assistants. If the focus is policy compliance, we emphasize automation tools that ensure adherence to regulatory standards.
Stakeholder Engagement: We ensure the AI strategy aligns with the organization's goals by engaging various stakeholders (including department heads, IT teams, and staff) to gather input and ensure the AI roadmap addresses the needs of all users.
3. Data Assessment and Integration:

Data Readiness Evaluation: We conduct a data readiness evaluation to understand the availability, quality, and structure of data across the organization. Public sector entities often have data siloed across multiple departments, so we assess how data can be integrated and centralized to support AI-driven insights.
Security and Compliance: We incorporate data privacy and security assessments to ensure the AI strategy complies with relevant regulations (such as GDPR, PIPEDA, or specific public sector privacy laws).
4. Roadmap Development:

Phased Implementation: Based on the entity's readiness and resources, we create a phased AI roadmap. The roadmap outlines immediate next steps (e.g., data integration), medium-term goals (e.g., deploying a proof of concept), and long-term milestones (e.g., full AI adoption across multiple departments).
Tactical vs. Strategic Initiatives: The roadmap distinguishes between tactical AI initiatives (quick wins) and strategic AI investments (longer-term projects) to ensure measurable progress while also building for the future.
5. Capacity Building and Training:

Staff Training and Upskilling: We include a component for staff training to build the internal capacity needed for AI adoption. This may involve AI literacy programs for leadership and hands-on training for technical teams.
Sustainability: Our strategy also emphasizes sustainability, ensuring that the entity can maintain and expand the AI solutions over time without heavy reliance on external consultants.
Ensuring AI Strategy Alignment with Public Entity Goals:
1. Goal Mapping and Key Performance Indicators (KPIs):

We ensure the AI strategy aligns with the entity's goals by mapping each AI initiative to specific objectives. For example, if a goal is to reduce operational costs, we align AI automation initiatives to track cost savings as a primary KPI. If improving service delivery is a goal, we focus on citizen satisfaction and response time metrics.
2. Continuous Monitoring and Feedback:

Our AI strategy incorporates continuous monitoring and feedback loops to ensure that the AI solutions deliver the intended results. We provide real-time dashboards and reporting tools that allow leadership to track the progress of AI implementations against established goals.
3. Regular Strategy Review: |

			We offer periodic strategy reviews to ensure that the AI roadmap stays aligned with the evolving needs of the organization. This ensures that any changes in policy, budget, or priorities are reflected in the AI initiatives.
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	Approach to Responsible AI Policy Development 1. Ethical Framework for AI: At Outlook Insight, we recognize the importance of creating responsible AI systems that prioritize fairness, transparency, and accountability. Our approach is grounded in adhering to widely accepted ethical AI principles and ensuring our solutions align with public sector standards and regulations. We focus on the following key areas in our responsible AI policy: Bias Mitigation: We ensure that the data used for AI training is representative, balanced, and subjected to rigorous analysis to minimize biases that could affect outcomes. Our models undergo continuous refinement to prevent discrimination based on factors such as race, gender, or socioeconomic status. Fairness: Our AI solutions are designed to deliver equitable results across all user groups. This includes the careful selection of data sources, as well as using fairness-aware machine learning algorithms to reduce potential inequalities in decision-making. Transparency: We emphasize explainability in our AI systems, providing clear documentation on how decisions are made by the AI. This transparency is crucial for public sector clients who must ensure that decisions made by AI systems can be understood and justified. 2. Responsible AI Practices: Data Auditing: We perform data audits before and after the deployment of AI solutions to ensure that the data used is ethical, compliant, and free from harmful biases. We collaborate with clients to review data collection practices and ensure they meet fairness and compliance standards. Algorithm Transparency: Our AI models include explainable AI (XAI) techniques that allow users to understand the basis of an AI decision. This helps ensure accountability, particularly when AI decisions impact public-facing services. Continuous Monitoring: Post-deployment, our AI solutions are continuously monitored to detect and address any potential biases that may emerge over time as data inputs evolve. We provide clients with tools to evaluate and audit AI decisions to ensure ongoing fairness. Example of Responsible AI Policy in Action: Washington State Department of Vocational Rehabilitation (DVR): In our AI Knowledge Interpreter (KI) implementation for the Washington State DVR, ethical concerns around fairness and bias were a critical part of the project. The DVR interacts with diverse populations, including individuals with disabilities, minority groups, and people from various socioeconomic backgrounds. Ensuring that our AI solution provided equitable access and information to all users was paramount. Steps Taken: Bias Mitigation: During the development of the KI, we conducted a thorough data bias analysis to identify potential gaps or biases in the policy documents that were being interpreted by the AI. We ensured that the data used was representative of all the populations served by the DVR and worked with policy experts to identify language that could lead to biased interpretations. Transparency and Fairness: We implemented explainability features in the KI that allow DVR staff to understand how the AI reached its conclusions. This was critical for transparency, especially when staff used the AI to interpret complex policies. By making the decision-making process transparent, we empowered staff to

			make informed decisions that aligned with DVR's goals of fairness and inclusion. Monitoring for Ethical Use: After the solution was deployed, we set up monitoring protocols that allowed DVR to continuously assess whether the AI was producing fair and unbiased results. This ongoing evaluation ensured that the AI system adapted as new policies were introduced and as the population's needs evolved. Outcome: The AI Knowledge Interpreter has helped DVR serve its diverse population more effectively, ensuring that individuals from all backgrounds receive consistent and unbiased policy information. The transparency built into the system also increased trust among staff, knowing they could rely on the AI to support their decision-making processes without introducing unintended biases.	
75	IMPLEMENTATION AND SUPPORT SERVICES	⦿ Yes ○ No	Implementation and Support Services 1. Structured Implementation Approach: Outlook Insight follows a structured and phased approach to the implementation of AI solutions for public sector clients. This ensures a smooth transition from planning to deployment, with minimal disruption to existing operations. Phase 1: Planning and Assessment: We begin with a detailed assessment of the entity's current infrastructure, data systems, and specific needs. This phase includes gathering requirements from stakeholders and defining the project scope, timelines, and milestones. Phase 2: Pilot and Proof of Concept: Before full implementation, we conduct a proof of concept (PoC) to validate the AI solution. This allows stakeholders to see the solution in action and make any necessary adjustments before scaling. Phase 3: Full Deployment: After successful PoC testing, we move into full deployment. Our team manages the integration with existing systems, ensuring that all configurations are tailored to the specific workflows of the entity. Phase 4: Training and Handover: Comprehensive training is provided for all end-users, administrators, and technical staff. We ensure that users are fully equipped to leverage the AI tools effectively, with training sessions tailored to different roles. 2. Support Services: Ongoing Support: After deployment, we provide continuous support to ensure the solution remains operational and optimized for the entity's evolving needs. Our support services include: Help Desk: Available during business hours for troubleshooting and technical support, with emergency support available for critical issues. System Monitoring: Regular system health checks and monitoring are conducted to ensure optimal performance and address potential issues proactively. Updates and Enhancements: As AI technology evolves, we provide regular updates to ensure that our solutions remain cutting-edge. These updates may include new features, security patches, and performance improvements. 3. Customizable Service Level Agreements (SLAs): We offer customizable SLAs to ensure that each client receives the level of support they need. This can include specific response times, resolution times, and ongoing consultation services. SLAs are tailored based on the complexity of the solution and the client's operational requirements. 4. Proactive Maintenance and Optimization: In addition to reactive support, our team provides proactive maintenance to ensure the AI solution continues to deliver value. This includes: Performance Reviews: Regular assessments to ensure	*

				the system is meeting performance benchmarks. Optimization Suggestions: Based on data analysis and usage trends, we provide recommendations for optimizing the AI solution, ensuring that it continues to evolve alongside the entity's needs. 5. Integration with Existing Systems: Our implementation team ensures seamless integration with existing systems, including databases, content management systems, and other software used by public entities. We follow best practices for API integration and ensure data security protocols are adhered to throughout the process. 6. Scalability for Future Growth: All our AI solutions are designed with scalability in mind. As public sector entities grow or their needs evolve, the AI solutions can be easily expanded to accommodate more users, more data, or additional functionalities. 7. Knowledge Transfer and Documentation: We prioritize knowledge transfer to ensure that internal teams can manage the AI solutions independently over time. This includes detailed documentation for administrators and users, as well as ongoing access to our online knowledge base for troubleshooting and advanced guidance. 8. Client-Specific Case Example: Washington State Department of Vocational Rehabilitation (DVR): After deploying the AI Knowledge Interpreter, our team provided ongoing support that included system monitoring and performance tuning. We worked closely with DVR to expand the system's capacity as new policies were introduced, ensuring that the AI solution continued to meet their evolving needs. The proactive support led to an overall improvement in system responsiveness and user satisfaction.	
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	Here's a detailed response to address the Infrastructure and Technology Recommendations for AI implementation: Infrastructure and Technology Recommendations for AI Implementation: 1. Cloud-Based Infrastructure for Scalability and Flexibility: For most public sector entities, we recommend deploying AI solutions on a cloud-based infrastructure. Using platforms like Microsoft Azure or Amazon Web Services (AWS) ensures that the AI solutions are scalable, secure, and flexible. Cloud-based infrastructure allows entities to scale the AI solution in terms of data, users, and processing power without the need for significant on-premises hardware investments. Benefits: This approach offers high availability, data redundancy, and automatic backups, which are critical for maintaining continuous service delivery in public sector environments. 2. Data Storage and Management Recommendations: Effective AI solutions rely on access to clean, structured, and secure data. We recommend integrating the AI solution with centralized data storage systems like SQL databases, NoSQL databases, or cloud-based data lakes depending on the client's current data architecture. Data Lakes: For public entities with large volumes of unstructured data (e.g., documents, multimedia, logs), we recommend a data lake architecture to store and manage this data for AI analysis. Data Warehousing: For entities with more structured data, a cloud-based data warehouse can be used to store, query, and retrieve data for AI models. Security: All data storage solutions incorporate encryption, role-based access control (RBAC), and audit logs to ensure data privacy and security in compliance with public sector regulations like GDPR or PIPEDA. 3. Networking and Connectivity:	

Ensuring high-speed, low-latency network connectivity is essential for AI systems that rely on real-time data processing or cloud services. We recommend upgrading network infrastructure to support higher bandwidth connections, particularly in environments where AI-based chatbots, real-time decision-making tools, or data streaming are involved.

Virtual Private Network (VPN): For government entities, a secure VPN can be used to connect on-premises infrastructure to the cloud, ensuring secure and encrypted communications between AI services and data repositories.

Ensuring Seamless Integration with Existing IT Systems and Databases:

1. API-Driven Integration:

API (Application Programming Interface)-driven integration is at the core of how we ensure seamless interaction between our AI solutions and the existing IT infrastructure of public sector clients. Our AI solutions are built with standardized APIs that allow them to easily integrate with databases, content management systems (CMS), and enterprise resource planning (ERP) systems.

Interoperability: We ensure that our APIs conform to industry standards (e.g., RESTful APIs) to maximize compatibility and interoperability with existing software systems.

Example: If an entity is using an existing SQL database to store records, the AI system can directly query this database through the API, process the data, and return actionable insights without the need to duplicate or move data between systems.

2. Data Integration and Migration:

Data integration is a key factor for successful AI implementation. We perform a thorough analysis of the entity's existing data sources to create a data integration plan. This plan addresses the following:

Data Mapping: We map out data structures and schemas across systems to ensure that the AI solution can access and process data in a unified manner.

ETL (Extract, Transform, Load): We leverage ETL pipelines to pull data from different sources, clean and standardize it, and load it into the AI solution's training and processing systems.

Real-Time Data Access: For systems requiring real-time data access (such as decision-making dashboards or live monitoring systems), we implement streaming data pipelines using platforms like Apache Kafka or AWS Kinesis to feed the AI system with real-time data.

3. Ensuring Compatibility with Legacy Systems:

Many public entities rely on legacy IT systems that may not be compatible with modern AI platforms. We ensure compatibility by using middleware or adapters that enable legacy systems to communicate with AI solutions. This ensures that entities don't need to overhaul their entire infrastructure to adopt AI solutions.

Example: If a public sector entity is using an older content management system, we can deploy a custom integration layer that enables the AI solution to pull data from this system without disrupting existing workflows.

4. Security and Compliance:

We prioritize data security and regulatory compliance throughout the integration process. Our AI systems are designed to adhere to public sector security standards such as FISMA, FedRAMP, and NIST, ensuring that data integrity and security are maintained.

Identity and Access Management (IAM): We implement IAM solutions that integrate with existing identity systems (e.g., Microsoft Active Directory) to manage access to AI solutions.

Audit and Monitoring: We provide built-in tools for monitoring and auditing AI activity to ensure transparency and detect any anomalies in data usage or decision-

making processes.
5. Customization and Flexibility:

Each public sector entity has unique needs, and we ensure that our AI solutions are highly customizable to integrate with their specific infrastructure. We work with the entity's IT department to ensure that the AI solution can adapt to their specific workflows, systems, and processes without requiring a complete overhaul of existing tools.
Client Example: Integration with Existing Systems:

Washington State DVR: We integrated our AI Knowledge Interpreter (KI) with the DVR's existing policy management system, ensuring seamless data retrieval without duplicating data. We implemented API connectors to interact with their SQL database, allowing the AI to pull relevant policy documents and provide real-time responses to user queries. The integration was smooth, with minimal disruptions to DVR's ongoing operations.

| 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 | Steps for Data Preparation for AI Implementation:
1. Data Inventory and Assessment:

The first step in our data preparation process involves conducting a data inventory to identify all relevant data sources within the entity. This includes structured data (e.g., databases) and unstructured data (e.g., documents, emails, reports). We also assess the format, volume, and quality of this data to determine its readiness for AI processing.
Data Governance: We work with the entity to evaluate data governance policies to ensure that data is handled responsibly and in compliance with regulations.
2. Data Cleaning and Preprocessing:

Once we have identified the data sources, we begin the process of data cleaning and preprocessing. This step involves:
Handling Missing Data: We address missing or incomplete data by either imputing missing values (e.g., using statistical methods) or flagging records with significant data gaps for exclusion from the AI model.
Normalization: Data is normalized to ensure consistency in units, formats, and values. For example, dates are standardized across datasets, and numerical values are converted to common units (e.g., currency or temperature).
Duplicate Removal: We identify and remove any duplicate records that could skew the AI model's learning process.
Outlier Detection: Our team identifies and manages outliers that could distort the AI model. Outliers are analyzed to determine whether they represent true data points or errors, and appropriate actions are taken accordingly.
3. Data Transformation and Feature Engineering:

Data Transformation: Data is transformed into a format that is suitable for AI algorithms. This may involve converting categorical data into numerical formats (e.g., one-hot encoding) or scaling values to a consistent range.
Feature Engineering: We perform feature engineering to create new data attributes or features that can improve the AI model's performance. This includes identifying patterns or relationships within the data that may not be obvious in its raw form.
Example: For a public sector entity using AI to predict policy outcomes, we may derive features from historical policy data, citizen demographics, or service usage patterns that can improve the AI's predictive accuracy.
4. Data Integration:

AI systems often require data from multiple sources to be integrated into a centralized repository. We use ETL (Extract, Transform, Load) pipelines to extract data from different systems, transform it into a unified format, and load it into a centralized data lake or warehouse for AI |

processing.

Real-Time Data: In some cases, we implement real-time data integration using streaming technologies like Apache Kafka or AWS Kinesis to ensure that the AI model is working with the most up-to-date information.

Ensuring Data Quality and Consistency:

1. Data Validation and Quality Checks:

Throughout the data preparation process, we implement data validation checks to ensure that the data is accurate and complete. These checks include:

Schema Validation: Ensuring that the data conforms to the expected schema (e.g., data types, field lengths).

Range and Constraint Checks: Validating that numerical values fall within expected ranges and that constraints (e.g., uniqueness or non-null values) are adhered to.

Consistency Checks: Ensuring that data is consistent across different systems. For example, if a public sector entity maintains data in both a CRM and a financial system, we ensure that relevant fields (e.g., customer IDs) match across both datasets.

2. Data Consistency through Standardization:

Data Standardization: We standardize data formats, such as text encoding (e.g., converting all text to UTF-8), to ensure consistency. This prevents issues that can arise from using disparate systems and helps ensure that data from different sources can be seamlessly integrated.

Master Data Management (MDM): For larger organizations, we recommend implementing MDM practices to ensure that key data (e.g., customer or citizen records) remains consistent across systems and departments.

3. Ongoing Data Quality Monitoring:

After the AI model is deployed, we implement ongoing data quality monitoring to ensure that any new data ingested into the system continues to meet the established quality standards. This includes setting up automated data quality reports that flag anomalies, missing values, or inconsistencies in real-time.

Client Example: Washington State Department of Vocational Rehabilitation (DVR):

During the implementation of the AI Knowledge Interpreter (KI) for Washington State DVR, we worked extensively on data preparation to integrate policy documents, case management data, and citizen queries into a unified AI model.

Data Cleaning and Feature Engineering: We standardized policy documents by removing redundant sections, aligning formatting, and ensuring all content was searchable by the AI system. We also engineered features that allowed the AI to recognize similar questions phrased in different ways, ensuring data consistency and improving the AI's ability to deliver accurate responses.

Outcome: These steps significantly enhanced the quality of the AI's outputs, leading to more consistent and reliable information retrieval for DVR staff.

| 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 Example: AI Knowledge Interpreter for Washington State DVR
Client: Washington State Department of Vocational Rehabilitation (DVR)

Objective: Washington State DVR wanted to explore the feasibility of using an AI-powered tool to assist staff with retrieving relevant policy information quickly and accurately, reducing the time spent manually searching through policy documents and improving decision-making consistency.

Approach:

We conducted a proof of concept (PoC) for an AI Knowledge Interpreter (KI) to demonstrate its ability to process large volumes of policy documents and provide real-time answers to staff queries.
The PoC focused on integrating the AI tool with existing policy documents, including the Washington Administrative Code (WAC) 388-891 and various internal Standard Operating Procedures (SOPs).
Steps Involved:

Data Preparation: We ingested and processed several policy documents and SOPs into the AI system, ensuring they were searchable and structured for accurate retrieval.
Natural Language Processing (NLP) Integration: The AI tool was configured to understand staff queries in natural language, allowing them to ask questions in simple terms without needing to know the exact policy wording.
User Testing: We provided a small group of DVR staff with access to the system to test its usability and effectiveness. The PoC focused on key use cases such as retrieving policy sections related to service eligibility, self-employment, and compliance.
Outcomes:

Reduced Search Time: The PoC demonstrated a 30% reduction in time spent searching for policy information. Staff were able to receive accurate answers almost instantly, as opposed to manually sifting through documents.
Improved Accuracy: The AI system delivered highly accurate responses to policy-related queries, increasing decision-making consistency across staff members.
User Adoption: Feedback from DVR staff indicated high levels of satisfaction with the tool's ease of use and ability to interpret complex policy questions.
Next Steps: Following the success of the PoC, the AI Knowledge Interpreter was fully implemented across the DVR, leading to widespread improvements in productivity and service delivery. The success of this project demonstrated the feasibility and impact of AI in public sector environments, setting the stage for future AI innovations within DVR. |
| 79 | | CUSTOM AI MODEL DEVELOPMENT

Describe your approach to developing custom AI models tailored to the specific needs of an entity. | ☉ Yes
○ No | Approach to Developing Custom AI Models:
1. Collaborative Requirement Gathering:

Our approach begins with a deep understanding of the entity's unique needs and goals. We start by conducting a series of consultations and workshops with stakeholders, including department heads, IT teams, and end-users, to gather detailed requirements. This step ensures that the AI model we develop is aligned with the specific challenges and objectives of the entity.
Use Case Identification: We work closely with the client to identify key use cases where AI can deliver the most impact, such as automating routine tasks, analyzing large datasets, or providing predictive insights.
2. Data Analysis and Preparation:

Data Exploration: We conduct an initial data exploration to assess the quality, structure, and relevance of the available data. This helps us determine whether the data is sufficient for training a custom AI model or if |

additional data sources are needed.

Data Preparation: Next, we preprocess the data, including tasks such as cleaning, normalizing, and transforming it into a format suitable for AI model training. We ensure that the data is representative of the entity's operations and free from bias, ensuring fairness and accuracy in AI outputs.

3. Model Selection and Customization:

Model Selection: Based on the use cases and data, we select the most appropriate type of AI model (e.g., supervised learning, unsupervised learning, neural networks, natural language processing (NLP)). If a pre-trained model can be adapted, we customize it to suit the specific needs of the entity.

Custom Model Development: In cases where off-the-shelf models aren't sufficient, we develop a custom AI model from the ground up, tailored to address the entity's particular challenges. This may involve creating models for predictive analytics, classification, clustering, or natural language processing (depending on the problem being solved).

4. Iterative Model Training and Testing:

Training the Model: The custom AI model is trained using historical and real-time data provided by the entity. We use an iterative process, allowing for continuous improvements and refinements to the model as we receive feedback.

Validation and Testing: To ensure the AI model meets the entity's requirements, we perform extensive validation and testing using separate data sets. This step includes cross-validation, A/B testing, and performance analysis to ensure the model delivers accurate, reliable results.

5. User Feedback and Model Refinement:

User-Centered Design: Throughout the process, we incorporate feedback from end-users to ensure that the AI model fits seamlessly into existing workflows and systems. This ensures that the model is both functional and practical for day-to-day use. *

Model Refinement: Based on testing and feedback, we continue to refine the AI model, making adjustments to improve accuracy, usability, and performance over time.

6. Model Deployment and Integration:

Seamless Integration: Once the custom AI model has been fully developed and tested, we integrate it into the entity's existing IT infrastructure, ensuring compatibility with databases, software systems, and APIs. This integration allows the AI model to work smoothly alongside the entity's existing tools and platforms.

Real-Time and Batch Processing: Depending on the use case, the model can be deployed for real-time processing (e.g., chatbots, recommendation engines) or batch processing (e.g., periodic reporting, large-scale data analysis).

7. Monitoring and Continuous Improvement:

Ongoing Monitoring: After deployment, we implement systems for monitoring the AI model's performance to ensure it continues to meet the entity's evolving needs. This includes tracking key performance metrics, detecting any model drift, and making necessary updates to improve the model's efficiency and accuracy.

Retraining and Updates: As new data becomes available or the entity's requirements change, we offer periodic retraining of the AI model and ongoing support to ensure it remains aligned with the organization's goals.

Example of Custom AI Model Development:

Client: Washington State DVR

Need: Washington State DVR needed a custom AI solution to assist staff with retrieving relevant policy information from large, complex policy documents in real-time.

				Solution: We developed a custom AI Knowledge Interpreter (KI), tailored specifically to handle complex policy documents for DVR. The model was trained to recognize legal terminology and process natural language queries from DVR staff, providing precise answers from the policy manuals. The model used natural language processing (NLP) techniques, specifically trained on Washington's Administrative Code and DVR's internal documents. Outcome: The AI Knowledge Interpreter reduced the time spent searching for policy information by 30%, leading to improved staff efficiency and more accurate, consistent responses to client inquiries. The model's continuous learning capabilities enabled it to adapt to new policies as they were introduced, ensuring long-term relevance.
80		PILOT PROJECT Describe how you manage and implement pilot projects.	⦿ Yes ○ No	Approach to Managing and Implementing Pilot Projects 1. Initial Planning and Scope Definition: Collaborative Planning: We begin by collaborating with the client to define the objectives, scope, and success criteria for the pilot project. This phase ensures that we have a clear understanding of the key outcomes that the public entity seeks to achieve. Goal Setting: We work closely with stakeholders to set measurable goals and identify the specific use cases to be tested during the pilot. This includes determining which departments or teams will be involved, what data will be used, and what AI capabilities are critical to test. Timeline and Milestones: A project timeline is established, along with key milestones for evaluating progress at various stages of the pilot. 2. Data Preparation and System Setup: Data Collection and Preprocessing: We gather the necessary data for the pilot and prepare it for AI model training and testing. This involves cleaning and transforming the data, ensuring it is accurate, consistent, and suitable for the AI solution being implemented. Infrastructure Setup: Depending on the requirements, we set up the necessary infrastructure to support the pilot, which may include deploying a cloud environment or integrating the AI model into the entity's existing systems. Security and Compliance: During this phase, we ensure that all data handling complies with relevant security and privacy regulations, particularly for public sector clients. 3. Pilot Execution: Model Development and Customization: If a custom AI model is part of the pilot, we proceed with model development or customization based on the entity's specific requirements. This includes training the AI model using historical data and validating its accuracy and relevance to the use case. User Testing and Feedback: Key stakeholders and end-users are given access to the system to test the AI solution in real-world scenarios. We collect feedback on usability, performance, and accuracy, ensuring that the AI system delivers value and meets the entity's needs. 4. Monitoring and Adjustments: Performance Monitoring: During the pilot, we monitor the AI solution's performance against the defined success criteria. We track key metrics such as accuracy, response times, and user satisfaction, making adjustments as necessary to optimize the model. Iterative Improvements: Based on user feedback and performance data, we make iterative improvements to the AI solution throughout the pilot phase. This ensures that any issues or inefficiencies are addressed before full-scale implementation. 5. Evaluation and Reporting:

| | | | | Post-Pilot Evaluation: Once the pilot is complete, we conduct a thorough evaluation of the outcomes compared to the initial objectives. We measure the success of the pilot by analyzing performance metrics, user feedback, and other data points.
Reporting: A comprehensive pilot report is provided to the entity, detailing the results, lessons learned, and recommendations for full-scale implementation. This report includes an analysis of how the AI solution improved specific processes or workflows during the pilot.
6. Decision on Full-Scale Implementation:

Based on the results of the pilot, the client can decide whether to proceed with a full-scale implementation of the AI solution. We provide support in transitioning from pilot to full deployment, ensuring that any necessary adjustments are made and that the AI solution is optimized for broader use.
Example: Washington State DVR Pilot Project:
Objective: For Washington State DVR, we conducted a pilot to test the feasibility of using the AI Knowledge Interpreter (KI) to assist staff in retrieving policy information more efficiently.
Execution: We integrated a custom AI model that was trained on DVR's policy documents and enabled staff to query the system using natural language. The pilot involved key staff members testing the system for two months.
Outcome: The pilot demonstrated a 30% reduction in time spent searching for information, leading to a decision to move forward with full implementation across the agency. |
| 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
1. Post-Pilot Evaluation and Feedback Collection:

Comprehensive Review: After the pilot project concludes, we conduct a thorough evaluation of the pilot's performance against the pre-defined success criteria. This includes gathering feedback from end-users, key stakeholders, and technical teams to understand what worked well and what areas need improvement.
Metric Review: We review the performance metrics captured during the pilot phase, including accuracy, efficiency improvements, and user adoption rates. This allows us to assess whether the AI solution met the pilot's objectives and if any modifications are needed before scaling up.
2. Action Plan for Full Deployment:

Scalability Assessment: One of the critical steps is assessing the scalability of the AI solution. This involves ensuring that the system can handle a larger volume of users, data, and transactions as it moves from pilot to full-scale deployment. We check for any technical limitations or bottlenecks that might arise when expanding the system.
Custom Roadmap: We create a detailed deployment roadmap that outlines the steps for scaling the solution across the entire organization. This roadmap includes tasks related to infrastructure scaling, data integration, training for additional staff, and ongoing monitoring.
User Training and Documentation: We expand the training efforts to ensure that all relevant users and administrators are adequately trained on the system. This includes providing detailed user guides, quick reference materials, and hands-on training sessions tailored to each department's needs.
3. Technical Scaling and System Optimization:

Infrastructure Scaling: We ensure that the underlying cloud infrastructure or on-premise systems supporting the AI solution are adequately scaled to handle the increased load. This may involve increasing server capacity, optimizing database queries, or deploying additional nodes for distributed processing.
System Integration: We fully integrate the AI solution with |

the entity's existing systems (e.g., databases, CRMs, policy management tools) to ensure seamless interaction. Any integrations tested during the pilot are expanded to cover additional departments, services, or data sources. Performance Tuning: The AI model may need tuning to optimize performance at scale. This includes adjusting algorithms, optimizing queries, and ensuring that the AI continues to provide accurate results when handling larger datasets or more complex queries.
4. Continuous Monitoring and Iterative Improvements:

Ongoing Monitoring: Once deployed, we continuously monitor the AI solution to ensure it functions correctly at scale. This includes setting up dashboards for real-time tracking of key performance indicators (KPIs) such as system uptime, response times, and data accuracy.
Feedback Loops: We maintain feedback loops with end-users to identify any emerging issues or areas for improvement. This ensures that the system can be iteratively improved after deployment, enhancing user satisfaction and system performance.
Metrics Used to Measure Success
1. Performance Metrics:

Accuracy and Relevance: Measures how accurately the AI solution provides relevant answers, insights, or decisions. This metric is critical for AI models like natural language processing (NLP) systems or recommendation engines.
Response Time: The time taken by the AI solution to process a request and return a result. Ensuring that the system responds in real-time or within acceptable limits is a key success metric.
2. Efficiency and Productivity Metrics:

Time Savings: One of the key metrics is the amount of time saved by staff when using the AI solution. For example, if the AI is automating data retrieval or decision-making, we measure the reduction in time compared to manual processes.
Increased Capacity: We measure how much more work (e.g., inquiries processed, reports generated) the organization can handle after deploying the AI solution.
3. User Adoption and Satisfaction:

Adoption Rate: We track the percentage of users who actively use the AI solution post-deployment. A higher adoption rate indicates that the system is meeting user needs and delivering value.
User Satisfaction: Feedback from users is collected through surveys or interviews to gauge satisfaction with the AI system. Metrics such as ease of use, perceived value, and willingness to continue using the system are critical success factors.
4. Return on Investment (ROI):

Cost Savings: We track direct and indirect cost savings achieved through AI deployment, such as reductions in manual labor, error rates, or operational costs.
Improved Outcomes: For public sector clients, we measure how the AI solution impacts service delivery, such as reducing the time for citizens to receive services or increasing the accuracy of policy adherence.
Example: Washington State DVR Full Deployment:

After the successful pilot of the AI Knowledge Interpreter, we transitioned to a full-scale deployment, which involved expanding the system to cover all staff and integrating additional policy documents. Key metrics such as a 30% improvement in staff productivity and a significant reduction in policy interpretation errors were used to assess the success of the full deployment.

| 82 | | ONGOING SUPPORT AND MAINTENANCE

Describe what ongoing | ⦿ Yes
○ No | Ongoing Support and Maintenance Services
1. Proactive System Monitoring and Performance Optimization: |

| | | support and maintenance services are offered to ensure continued success of AI solutions in the face of rapidly evolving technology. | | 24/7 Monitoring: We provide continuous monitoring of the AI system's performance, ensuring that it operates efficiently and any issues are detected and resolved in real-time. Monitoring includes system uptime, response times, and the accuracy of AI outputs.
Performance Tuning: As the system is used and new data becomes available, we offer performance tuning services to optimize AI models and underlying infrastructure. This ensures that the AI solution adapts to changing conditions and continues to deliver accurate, relevant results.
2. Regular Updates and Feature Enhancements:

AI Model Updates: AI models require ongoing updates to remain accurate and aligned with the latest data. We offer regular model retraining to incorporate new data, adjust for evolving patterns, and prevent model drift (where accuracy diminishes over time).
Software Updates: The AI platform is regularly updated with new features, security patches, and performance improvements to ensure it remains up-to-date with the latest advancements in technology and remains secure against emerging threats.
3. Help Desk and Technical Support:

Help Desk Support: We offer help desk support during business hours, with emergency support available outside of those hours. Users can report issues or request assistance, and our team responds based on predefined service level agreements (SLAs).
Tiered Support Structure: We provide a tiered support system, with Level 1 support for routine issues (e.g., user access or basic troubleshooting) and Level 2/3 support for more complex technical challenges (e.g., data integration or AI performance issues).
4. Scalability and Adaptability:

Scalability Support: As the needs of the entity grow, we ensure that the AI solution can scale to handle larger datasets, more users, or additional functionalities. This includes increasing server capacity, optimizing databases, and ensuring that the infrastructure can support expanded use.
Custom Enhancements: We offer the ability to customize the AI solution over time to meet evolving needs. For example, as public sector entities update policies or regulations, we can update the AI model to incorporate these changes seamlessly.
5. Security and Compliance Updates:

Data Security Monitoring: Ongoing security assessments are performed to protect the system from vulnerabilities. This includes regular updates to security protocols, encryption methods, and access controls to ensure compliance with public sector security standards (e.g., GDPR, FedRAMP, FISMA).
Compliance Maintenance: We ensure that the AI system continues to comply with applicable regulations as new laws or guidelines emerge. This includes updating privacy settings, adjusting data retention policies, and ensuring that the system can handle any new requirements from government entities.
6. User Training and Knowledge Transfer:

Refresher Training: As the AI solution evolves with new features and updates, we offer refresher training for existing users and onboarding sessions for new users. This ensures that all stakeholders remain informed about the system's capabilities and how to use it effectively.
Knowledge Transfer: We prioritize knowledge transfer to ensure that internal IT teams can manage the system independently over time. This includes documentation updates, technical training for administrators, and access to an online knowledge base for troubleshooting and best practices.
7. Continuous Feedback and System Improvement: | * | |

			Feedback Loops: We maintain continuous communication with end-users and administrators to gather feedback on system performance and identify opportunities for improvement. This feedback informs our ongoing maintenance and helps us prioritize updates or enhancements that improve user satisfaction. Regular Review Sessions: We conduct regular review meetings with stakeholders to assess how well the AI solution is meeting organizational goals and to plan for future updates or strategic improvements.	
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	Training and Education Programs for AI Solutions 1. Comprehensive Training Approach: Our training programs are designed to help entity staff effectively adopt, use, and manage AI solutions. We tailor the training based on the roles of the participants, ensuring that both technical teams and end-users receive the specific knowledge they need to utilize the AI system to its full potential. Onboarding and Long-Term Support: We provide a structured training plan that starts with initial onboarding and continues with ongoing educational resources and refresher sessions to ensure long-term adoption and success. Key Topics and Skills Covered in Training Programs: 1. AI System Overview and User Orientation: Basic System Navigation: Training begins with a high-level overview of the AI solution, introducing users to its interface, features, and functionality. Participants are taught how to navigate the system, submit queries, and interpret AI-driven results. Use Case Scenarios: We demonstrate the AI system's capabilities through real-world scenarios relevant to the entity's operations. For example, public sector clients may learn how to use AI to retrieve policy information or analyze large datasets for decision-making purposes. 2. AI Query and Interaction Skills (For Non-Technical Users): Natural Language Processing (NLP): We train users on how to interact with the AI using natural language queries. This includes how to phrase questions, leverage keyword searches, and interpret the AI's responses for decision-making. Synonym and Contextual Understanding: Users learn how the AI interprets similar terms (synonyms) and the context of queries, allowing them to get accurate results even with varied phrasing. Troubleshooting Common Issues: Staff are trained to troubleshoot common issues, such as refining their queries or adjusting filters to improve the accuracy of the AI's output. 3. Advanced AI Features and Customization (For Administrators and IT Teams): AI Model Management: For technical staff, we provide training on how to manage and monitor the AI model itself. This includes how to retrain the model with new data, adjust algorithms for improved performance, and manage AI system settings. Data Integration and System Monitoring: IT teams are trained on data integration processes and system monitoring tools, ensuring they can track system health, data flow, and performance metrics in real-time. Security and Compliance: We cover best practices for ensuring the AI solution adheres to the entity's security protocols and regulatory compliance (e.g., GDPR, HIPAA). This includes how to manage access control, data encryption, and audit logs. 4. Training on AI Governance and Ethical Considerations: Bias and Fairness: We provide training on how the entity can ensure the AI operates ethically by identifying and mitigating bias in the model's outputs. This includes discussions on responsible AI governance, transparency,	*

| | | | | and fairness in AI decision-making. Ongoing Monitoring and Audits: Staff learn how to conduct routine audits of the AI model to ensure ongoing fairness, accuracy, and relevance. Delivery Methods for Training: 1. Live Workshops and Webinars: We conduct live workshops and webinars for initial onboarding, allowing for real-time interaction, Q&A sessions, and hands-on practice. These sessions are tailored to different groups (e.g., end-users, administrators) to ensure each participant gets focused, relevant training. 2. On-Demand Training Materials: Video Tutorials: In addition to live sessions, we provide video tutorials that users can reference at their convenience. These cover both basic and advanced system features, as well as step-by-step guides for troubleshooting. Documentation and User Guides: Detailed user guides and quick reference materials are provided for both technical and non-technical users, ensuring that all participants have access to written instructions on how to use the system effectively. 3. Refresher Courses and Advanced Training: As the AI solution evolves, we offer refresher courses to keep users up-to-date with new features and updates. For technical teams, we provide advanced training on optimizing the AI solution, managing new data inputs, and improving system performance. Experience in AI Training and Education: Proven Track Record: We have extensive experience providing AI training and education to public sector clients. For example, during the implementation of the AI Knowledge Interpreter (KI) for Washington State DVR, we conducted multiple training sessions tailored to the needs of both end-users and administrators. Our training program contributed to a high user adoption rate and a 30% reduction in time spent searching for policy information. Continuous Support: Beyond initial training, we maintained ongoing educational resources, offering regular webinars and refresher sessions as the system evolved, ensuring long-term success and user proficiency. |

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_Model_Question_60.pdf - Thursday November 07, 2024 09:44:48
- [Financial Strength and Stability](#) - Dun_Bradstreet_Financial_OUTLOOK-INSIGHT-LLC_11-04-2024_Question_13.pdf - Thursday November 07, 2024 09:45:23
- Marketing Plan/Samples (optional)
- WMBE/MBE/SBE or Related Certificates (optional)
- [Standard Transaction Document Samples](#) - Product_Order_Form_Quote_Template_Question_58.pdf - Thursday November 07, 2024 09:46:04
- Requested Exceptions (optional)
- [Upload Additional Document](#) - Multiple Supporting Files.zip - Thursday November 07, 2024 09:59:39

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. - Sean Campbell, Chief Operating Officer, Outlook Insight LLC

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

◌ **Yes**   ◉ **No**

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

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

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
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