MASTER AGREEMENT #112025
CATEGORY: Fleet Leasing and Vehicle Management Services
SUPPLIER: Curbo, Inc. o/a Roam Auto Sales & Leasing

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 Curbo, Inc. o/a Roam Auto Sales & Leasing, 863 Kipling Ave., Unit 402, Etobicoke, Ontario M8Z 5H1 (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 May 4, 2030, unless it is cancelled or extended as defined in this Agreement.

   1. **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.

   2. **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.

6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.

7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #112025 to Participating Entities. In Scope solutions include:

   1. Sourcewell is seeking proposals for Fleet Leasing and Vehicle Management Services, including, but not limited to:
      a. Services for the acquisition by Sourcewell participating entities, whether by lease or financing, of on-road vehicles of all types or classifications, all weight classes, and all engine types;
      b. New vehicle service and preparation for the vehicles described in subsection 1. a. above, such as, pre-delivery inspection, parts and accessories installation, and vehicle marking application or installation;
      c. Preventative maintenance plans, vehicle maintenance and repair services, and related service level agreements for Sourcewell participating entity on-road vehicle fleets of all types; and,
      d. In addition to the solutions described in subsections 1. a. - c. above, proposers may include a **complementary** offering of the following ancillary services:
         i. Short-term on-road vehicles rental programs;
         ii. Upfitting or aftermarket products;
         iii. Fleet management information technologies, such as: telematics, fleet monitoring, fuel management, fuel tank management, and motor pool/fleet sharing software systems;
         iv. Roadside assistance including towing, emergency charging, and repairs; and
         v. Vehicle battery longevity monitoring, replacement plans; including installation, operation, and maintenance of dedicated charging and fueling stations.

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:

a. **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.

b. **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.

c. **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.

a. **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.

b. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of $2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must comply with all applicable Davis-Bacon Act provisions.

c. **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of $100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies, 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.

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

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

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

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

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

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

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

k. **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this 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.

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

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

n. **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this 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.

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

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

q. **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this 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.

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

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

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

Article 2:
Sourcewell and Supplier Obligations

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

1) **Authorized Sellers**. Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.

2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
   - Identify the applicable Sourcewell Agreement number;
   - Clearly specify the requested change;
   - Provide sufficient detail to justify the requested change;
   - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
   - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions offered, even for those items where pricing remains unchanged.

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

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

    Sourcewell's Authorized Representative is its Chief Procurement Officer.

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

5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.

6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

    The Report must contain the following fields:
    - Participating Entity Name (e.g., City of Staples Highway Department);
    - Participating Entity Physical Street Address;
    - Participating Entity City;
    - Participating Entity State/Province;
    - Participating Entity Zip/Postal Code;
    - Sourcewell Participating Entity Account Number;
    - Transaction Description;
    - Transaction Purchased Price;
    - Sourcewell Administrative Fee Applied; and
    - Date Transaction was invoiced/sale was recognized as revenue by Supplier.

    If collected by Supplier, the Report may include the following fields as available:
    - Participating Entity Contact Name;
    - Participating Entity Contact Email Address;
    - Participating Entity Contact Telephone Number;

7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay an Administrative Fee to Sourcewell on all completed transactions to Participating Entities

utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.

8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.

9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.

10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.

11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.

12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.

13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.

14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.

15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.

16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.

17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.

19) **Grant of License.**
    a) **During the term of this Agreement:**
        i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.

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

    b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.
    c) **Use; Quality Control.**
        i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.

        ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.

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

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

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

22) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:

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

- $1,500,000 each occurrence Bodily Injury and Property Damage
- $1,500,000 Personal and Advertising Injury
- $2,000,000 aggregate for products liability-completed operations
- $2,000,000 general aggregate

b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.

c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.

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

e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

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

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

Article 3:
Supplier Obligations to Participating Entities

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

1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.

2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and

timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.

3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.

4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.

5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier's standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity's unique Sourcewell account number.

6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.

7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.

8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcewell

Signed by:
Jeremy Schwartz
C0FD2A139D06489...

By: ____________________________

Jeremy Schwartz

Title: Chief Procurement Officer

Date: 5/5/2026 | 2:23 PM CDT

Curbo, Inc. o/a Roam
dba Roam Auto Sales & Leasing

DocuSigned by:
Nicholas Coatsworth
8F1C16A58DAC4AE...

By: ____________________________

Nicholas Coatsworth

Title: Head of Sales

Date: 5/5/2026 | 9:45 AM PDT

RFP 112025 - Fleet Leasing and Vehicle Management Services

Vendor Details

Company Name:	CURBO INC. O/A ROAM
Does your company conduct business under any other name? If yes, please state:	Roam Auto Sales & Leasing
Address:	863 Kipling Ave Etobicoke, Ontario M8Z 5H1
Contact:	Nicholas Coatsworth
Email:	nick.coatsworth@roam.auto
Phone:	416-418-7902
Fax:	416-418-7902
HST#:	

Submission Details

Created On:	Friday October 10, 2025 13:41:56
Submitted On:	Thursday November 20, 2025 16:23:45
Submitted By:	Nicholas Coatsworth
Email:	nick.coatsworth@roam.auto
Transaction #:	c5744ae5-6b32-4f3b-a7b9-135c0ed157c4
Submitter's IP Address:	147.243.254.107

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.	Curbo Inc. o/a Roam	*
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).	14670001 CANADA INC. o/a Roam Auto Sales & Leasing	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	L10N4	*
5	Provide your NAICS code applicable to Solutions proposed.	532112	
6	Proposer Physical Address:	863 Kipling Ave Unit 402 Etobicoke, Ontario M8Z 5H1	*
7	Proposer website address (or addresses):	roam.lease	*
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):	Nicholas Coatsworth Head of Sales nick.coatsworth@roam.auto 416 418 7902	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Nicholas Coatsworth Head of Sales nick.coatsworth@roam.auto 416 418 7902	*
10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Nicholas Coatsworth Head of Sales nick.coatsworth@roam.auto 416 418 7902	*

Table 2A: Financial Viability and Marketplace Success (50 Points, applies to Table 2A and 2B)

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.	Roam is a modern fleet-management and vehicle-leasing company built on extensive industry experience in automotive leasing, fleet operations, maintenance, and mobility services. Founded to bring greater transparency, efficiency, and technology to the fleet industry, Roam provides a streamlined, data-driven approach to vehicle acquisition, management, and support. Our core values—**transparency, accountability, innovation, and customer partnership**—shape our service philosophy. We focus on delivering predictable costs, real-time fleet visibility, and proactive support through a combination of advanced fleet technology and high-touch service. Although Roam is a newer company, our leadership and partner network bring decades of experience in fleet leasing, OEM relations, upfitting, logistics, and maintenance management. This enables us to deliver end-to-end solutions that align directly with the needs of Sourcewell participating entities seeking a flexible, modern, and service-centric fleet partner.	*
12	What are your company's expectations in the event of an award?	If awarded, Roam will deliver **110% of the expected service** and immediately activate our sales and marketing campaigns to drive strong adoption. Our outreach will include coordinated communications to participating entities, targeted email campaigns, webinars, product demos, and direct engagement from our sales and account teams. We'll leverage our dealer and upfitter network to extend awareness and ensure every eligible agency knows the contract is live, easy to use, and ready to support their fleet needs. Our goal is simple: fast activation, high visibility, and making it effortless for entities to onboard and benefit from the program.	*
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.	Roam demonstrates strong financial stability through a combination of diversified funding, disciplined financial management, and backing from established industry partners. While we do not provide tax information or sensitive personal data, Roam can supply supporting financial documents—such as audited financial statements, letters of credit, and reference letters—through the designated upload section. Key indicators of Roam's financial strength include: • Consistent year-over-year revenue growth, driven by expanding fleet operations and nationwide service partnerships. • Strong capitalization supported by industry-experienced investors and financial institutions. • Low debt-to-equity structure, ensuring operational resilience and flexibility. • Reliable cash flow supported by recurring revenue streams from fleet management, leasing programs, and maintenance services. • Long-term supplier and OEM relationships that provide additional commercial stability and credit support. Roam is fully prepared to provide formal financial documents in the submission portal, demonstrating our capability to support large, multi-year public-sector fleet programs with confidence and continuity.	*
14	What is your US market share for the Solutions that you are proposing?	65%	*
15	What is your Canadian market share for the Solutions that you are proposing?	35%	*
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.	None.	*

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?	Roam is best described as a **service provider** delivering fleet management, leasing, acquisition support, and nationwide maintenance and upfitting coordination. Roam does not manufacture vehicles; instead, we work through a network of OEMs, certified upfitters, maintenance partners, and independent dealers to deliver the full range of products and services proposed in this RFP. Roam's sales and service functions are delivered through a combination of **direct employees** (account management, fleet operations, customer support, technology support) and **third-party partners** (OEM dealers, certified upfitters, and service centers). Our dealer and upfitter network is **independent**, allowing us to source the best vehicle solutions, pricing, and timelines for participating entities regardless of geography. All partners are pre-vetted, credentialed, and monitored by Roam to ensure quality, compliance, and consistent service delivery. Roam maintains unified oversight, service standards, and customer support across all providers, ensuring that participating entities experience a single, integrated service model regardless of the specific OEM, dealer, or upfitter involved. If you'd like, I can expand this into a more detailed narrative or add a summary of our partner vetting process.	*
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.	Roam, together with its financing, dealer, and service partners, maintains all licenses and certifications required to deliver the solutions contemplated in this RFP. Requirements vary by jurisdiction, but generally include: Roam and Financing/Leasing Partners Motor vehicle dealer / broker licenses (where applicable): Held either directly by Roam partners or OEM/dealer entities responsible for vehicle sale or assignment. Commercial leasing / financing licenses (where required): Maintained by Roam's financing partners in the states or provinces where they extend credit or lease agreements. Business registrations and good standing certificates: Maintained in all jurisdictions where Roam conducts business. Dealer, Upfitter, and Service Network Licensed motor vehicle dealers: All partner dealers hold the appropriate state/provincial dealer licenses and comply with OEM and regulatory requirements. Certified upfitters and body shops: Partners hold relevant OEM upfitter certifications, safety certifications, and local business licenses appropriate to their work scope. Technician qualifications: Many service partners employ ASE- or manufacturer-certified technicians for maintenance, diagnostics, and repair work. DOT and transport compliance: Carriers used for vehicle delivery maintain required Department of Transportation authority, insurance, and operating credentials. Technology, Safety, and Data Handling Roam and its key technology partners follow recognized standards for data security and privacy, including secure hosting, role-based access, and compliance with applicable data protection laws for fleet and driver information. Roam requires its third-party partners and subcontractors to maintain all licenses and certifications necessary for their role and monitors compliance as part of its onboarding and ongoing vendor management processes. Where requested, Roam can provide specific proof of licensing or certification for entities performing work under the contract.	*

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.	None.	*
20	Describe any relevant industry awards or recognition that your company has received in the past five years.	GLOBE AND MAIL TOP 50 FASTEST GROWING COMPANIES DELOITTE FAST50 FATEST TECH GROWING COMPANIES IN CANADA SME BUSINESS AWARDS STARTUP OF THE YEAR https://www.deloitte.com/ca/en/Industries/technology/research/fast50-winners.html	*
21	What percentage of your sales are to the governmental sector in the past three years?	48%	*
22	What percentage of your sales are to the education sector in the past three years?	27%	*
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?	Roam currently holds two public-sector supply arrangements in Canada: • Supply Ontario (Vendor of Record) • OECM (Ontario Education Collaborative Marketplace – Supplier) These agreements cover fleet services, leasing support, and related mobility solutions for provincial agencies, broader public-sector entities, and educational institutions across Ontario. Because these programs were awarded recently and Roam is still in the early stages of rollout and onboarding with participating entities, full three-year historical sales volumes are not yet available. Initial adoption has been strong, and year-over-year volumes continue to grow as more agencies transition into the programs. Roam can provide up-to-date volume reporting through the official contract reporting channels upon request. Roam expects that the Sourcewell agreement will complement these existing programs and expand our reach across North America, supported by dedicated sales, marketing, and dealer network engagement to drive contract utilization.	*
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?	Roam does not currently hold any GSA contracts or U.S. Standing Offers and Supply Arrangements (SOSA). However, Roam is listed as a shortlisted federal provider for government vehicle rentals, and we actively support federal agencies through our national rental and temporary fleet programs. On the Canadian side, Roam participates in broader public-sector supply programs, including Supply Ontario and OECM, but does not hold federal SOSA instruments at this time. Because Roam does not hold a current GSA or SOSA contract, there is no annual sales volume to report for the past three years for these contract types. Roam continues to expand its federal and public-sector footprint and expects this Sourcewell agreement to further strengthen our national cooperative and government contract presence.	*

Table 2B: References/Testimonials

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

Entity Name *	Contact Name *	Phone Number *	
The Corporation of the City of Mississauga	Sam Argentino, Procurement Manager, Sam.Argentino@mississauga.ca	905-615-3200 ext.5773	*
Netflix	Pete Lundragen, Transport Coordinator, lundrigan1@hotmail.com	705 596 3360	*
Kenaidan	Chuck Lutz, Equipment Manger CBLutz@kenaidan.com	416 526 9621	*

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.	Roam's sales and support functions are designed to provide responsive, high-quality	

service to Sourcewell participating entities through a combination of a dedicated internal team and an extended partner network.

1. Core Sales & Support Team (27 Full-Time Employees)
Roam maintains a core team of 27 full-time employees who jointly handle sales, onboarding, customer success, and ongoing support.
Team Composition
While responsibilities overlap to ensure agility and continuity, our internal team generally includes:
Account Executives – lead outreach, needs assessments, and contract education

Customer Success Managers – guide onboarding, implementation, and ongoing optimization

Fleet Operations Coordinators – manage ordering, delivery coordination, maintenance support, and warranty processes

Technical Support Specialists – support software onboarding, training, and troubleshooting

This cross-functional structure allows Roam to provide consistent coverage, reduce handoffs, and ensure that every participating entity receives a seamless, well-coordinated experience.

2. Team Capabilities and Responsibilities
Roam's core team manages all mission-critical customer-facing functions, including:
Needs analysis and solution design

Contract education and procurement guidance

Order configuration, quoting, and documentation

Vehicle and service onboarding

Maintenance, warranty, and roadside coordination

Digital platform training and support

Ongoing fleet performance reviews

Escalation management and issue resolution

Because each member of the team is trained across multiple functions, coverage remains strong even during surges in activity. *

3. Extended Sales & Support Capacity Through Partner Network
Roam enhances and scales its capabilities through a trusted network of third-party partners across the United States and Canada. These partners expand our reach and improve responsiveness—particularly in areas where local presence or specialized expertise is essential.
Partner Functions
Local delivery and acceptance services

Regional maintenance and repair support

Upfitting and equipment installation

Roadside assistance and towing

Warranty and recall work through OEM-authorized dealers

Field-level support in remote or non-contiguous geographies

These partners operate under Roam's direction, with Roam retaining full ownership of the customer relationship, service standards, communication, and issue resolution.

4. Scalability and Redundancy

		Roam's blended model—dedicated internal team + vetted partner network—allows Roam to: Scale service quickly as new entities join Support fleets of varying sizes Deliver consistent quality across diverse geographies Maintain redundancy for high-demand periods Provide specialized or regional services where needed This ensures a reliable experience for Sourcewell members nationwide.	
27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	Roam delivers its Solutions through a centralized, Roam-managed distribution model supported by trusted third-party partners where necessary. Unlike traditional fleet leasing providers that depend on a large, independent network of dealers or distributors, Roam serves as the primary contracting entity, point of contact, and coordinating body for all Solutions available through this agreement. Roam's approach ensures consistency, accountability, and a unified experience for all Sourcewell participating entities. 1. Centralized Delivery Through Roam as the Sole Authorized Seller Roam is the only Authorized Seller under this agreement. All products, services, and support—including leasing, fleet management software, upfitting coordination, maintenance management, and service delivery—are initiated and overseen directly by Roam. Roam's responsibilities as the primary seller include: Receiving and processing all orders Providing contract pricing, documentation, and specifications Coordinating vehicle acquisition and upfitting Managing all customer service and support Overseeing third-party service performance Ensuring compliance with all contract terms This single-vendor model provides participating entities with a consistent, predictable experience regardless of geography. 2. Use of Trusted and Vetted Third-Party Partners While Roam serves as the primary Authorized Seller, certain aspects of fulfillment—especially in remote, rural, non-contiguous, or specialized service areas—are supported by vetted third-party partners. These partners are not independent sellers. They operate under Roam's direction, and Roam retains responsibility for service quality, communication, and contract compliance. Types of Partners Roam May Utilize OEM-authorized service centers (for warranty work and specialized diagnostics) Certified upfitters and aftermarket installers Regional delivery and logistics providers Maintenance and repair facilities when matching local coverage Roadside assistance and towing providers Regional service partners in locations such as Alaska, Hawaii, U.S. Territories, and remote Canadian regions	*

		Roam selects partners based on capability, reliability, safety standards, and alignment with our service-level expectations. 3. Oversight, Quality Control, and Accountability Roam maintains full ownership of the customer experience and is responsible for: Partner vetting and approval Service-level monitoring Performance reporting Issue escalation and resolution Customer satisfaction tracking Training partners on Roam's operational standards If a partner does not meet required service thresholds, Roam either supplements or replaces that vendor to preserve service continuity. Participating entities always contact Roam, not the third party, for support or coordination. 4. Geographic Flexibility and Collaborative Delivery Roam's distribution model provides broad North American coverage while allowing flexibility to adapt to regional realities. In areas with limited infrastructure, such as: Hawaii Alaska U.S. Territories Remote or rural regions in the continental U.S. Roam collaborates with qualified partners and may also coordinate with local providers when they are better positioned to support entities effectively. Roam remains accountable for quality, communication, and workflow management.	
28	Service force.	See answer 26.	*

29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	Roam provides a centralized, streamlined ordering process for all vehicles, services, and technology solutions available under this agreement. Regardless of where the order originates or how it is ultimately fulfilled, all orders flow through Roam as the primary point of contact and accountable vendor. Roam manages the entire request-to-delivery workflow, ensuring a consistent experience for all participating entities while coordinating with trusted partners only when necessary to deliver localized or specialized services. 1. Ordering Through Roam's Centralized Digital Platform All participating entities submit orders directly to Roam through our online platform or with the assistance of our virtual account management team. Ordering Steps Needs Identification: The participating entity consults with Roam to define vehicle types, configurations, terms, upfitting needs, and service requirements. Configuration & Pricing: Roam provides contract-aligned pricing, specifications, and digital quotes through our platform. Approval Workflow: The participating entity reviews and approves the order internally using our digital tools or their internal procurement system. Order Submission: The order is formally submitted to Roam through the digital platform or via electronic documentation. Order Acknowledgment: Roam confirms receipt and initiates the fulfillment workflow. Roam's platform provides full visibility into order status, documentation, delivery timelines, and lifecycle support after the order is placed. 2. Roam as the Single Point of Contact Roam acts as the sole contracting party, responsible for: Receiving and validating all orders Ensuring compliance with Sourcewell contract terms Managing specifications, configurations, and pricing Coordinating upfitting and vehicle preparation Overseeing delivery timelines and logistics Providing customer support and training Maintaining all communication with the participating entity Even when third-party partners assist with fulfillment, Roam retains full accountability and quality oversight. 3. When and How Third-Party Partners Are Used In cases where Roam is not able to deliver a solution directly—such as in remote geographies, for specialized upfits, or for certain maintenance or delivery requirements—Roam coordinates fulfillment through trusted and vetted third-party partners. Roles of Third-Party Partners Vehicle delivery and acceptance services in remote or non-contiguous regions Upfitting or equipment installation through certified specialists Maintenance and repair services where regional coverage enhances responsiveness Roadside assistance or towing in areas without direct Roam support Local compliance or inspection services when mandated by regional regulations These partners operate under Roam's direction, using Roam-defined service standards, communication protocols, and documentation requirements. Roam's Oversight Responsibilities Roam maintains responsibility for: Partner selection and vetting Contractual compliance Quality assurance Service-level adherence Issue resolution Customer satisfaction Participating entities interact primarily and consistently with Roam, not individual partners. 4. Communication and Transparency Throughout the Process Throughout the ordering and fulfillment process, participating entities receive: Real-time updates through Roam's digital platform Dedicated support from Roam's account management team Clear visibility into timelines, delivery milestones, and service activities One unified channel for questions, changes, or problem resolution This single-vendor model eliminates confusion, even when partners are engaged behind the scenes.	*
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.	Roam's customer service program is designed to provide fast, reliable, and transparent support to all Sourcewell participating entities. Our service model combines centralized digital support, dedicated account management, and structured escalation protocols to ensure consistent, high-quality service across all geographies. Roam's overarching goal is to deliver exceptional responsiveness and proactive fleet support through measurable service standards and continuous performance monitoring. 1. Customer Service Structure and Access Channels Roam provides multiple structured support channels to ensure participating entities receive timely assistance: A. Virtual Account Management Team Every participating entity receives access to Roam's virtual account management team, responsible for: Serving as the primary point of contact	

Managing service requests and support needs
Providing updates on orders, delivery, maintenance, and fleet operations
Coordinating with third-party partners when necessary
Ensuring consistent communication and follow-through

B. Digital Support Portal
Users can submit requests directly through Roam's cloud-based platform, which includes:
Service ticket creation
Real-time status tracking
Maintenance and warranty request submission
Documentation uploads
Communication history

C. Live Support Channels
Email support
Phone support
Scheduled video consultations for complex needs
Optional text/SMS updates for urgent service tickets

These channels ensure that fleet managers, drivers, and administrators can reach Roam quickly using the format that works best for their operation.

2. Customer Service Workflow and Procedures
Roam uses a structured, standardized service process to ensure timely and predictable resolution.
Step 1 — Request Intake
Requests can be submitted through the digital platform, phone, or email.
Roam logs each request into our centralized service system with:
Priority classification
Estimated response time
Assigned agent
Required follow-up actions

Step 2 — Triage and Prioritization
Service requests are categorized based on urgency and impact:
Priority 1 (Critical):
Vehicle safety issues
Breakdown or immobilized vehicle
Urgent warranty concerns
Mission-critical fleet needs

Priority 2 (High):
Time-sensitive service requests
Repairs impacting operations but not safety
Warranty work requiring scheduling

Priority 3 (Standard):
General inquiries
Documentation requests
Non-urgent assistance

Step 3 — Resolution Coordination
Depending on the nature of the request, Roam will:
Coordinate maintenance or warranty appointments
Dispatch roadside assistance
Engage third-party partners where Roam does not directly service the region
Provide quotes, documentation, or training
Escalate urgent issues internally for management oversight

*

Step 4 — Follow-Up and Communication
Throughout the lifecycle of each service ticket, Roam provides:
Real-time updates via the digital platform
Email or phone notifications for major milestones
Direct communication from the account manager for critical requests

Step 5 — Closure and Verification

Roam closes each service ticket only after:
Confirming the issue has been resolved
Updating vehicle records and documentation
Receiving customer confirmation (if applicable)

3. Response-Time Commitments (SLAs)
Roam adheres to service-level commitments to ensure timeliness:
A. Support Response Times
Priority 1 (Critical): Response within 1 hour
Priority 2 (High): Response within 4 hours
Priority 3 (Standard): Response within 1 business day

B. Service Coordination Times
Maintenance or warranty appointment scheduling: Within 1 business day
Roadside assistance dispatch: Within 15 minutes of confirmation
Documentation requests: Delivered within 1 business day
Order or delivery status inquiries: Responded to same day
C. Communication Cadence
Daily updates for active high-priority repairs
Weekly updates for longer-term service events
Real-time digital updates for all service tickets
4. Proactive Service Features
Roam's service program includes several proactive elements that reduce downtime and improve customer experience:
A. Predictive Service Alerts
If telematics are included, Roam monitors:
Engine alerts
Battery health (EVs)
Diagnostic trouble codes (DTCs)
Mileage-based preventive maintenance
Alerts generate automatic service tickets for faster resolution.
B. Scheduled Check-Ins
Roam conducts:
Quarterly fleet health reviews
Seasonal reminders (e.g., winter prep, tire changes)
Renewal and lifecycle check-ins
C. Self-Service Knowledge Base
Roam provides:
Training videos
How-to articles
Troubleshooting guides
Policy and compliance documentation
5. Incentives and Internal Accountability Programs
Roam uses internal performance incentives to ensure providers and service partners meet our stated customer service goals.
A. Partner Performance Monitoring
For third-party service providers, Roam monitors:
Turnaround times
Service quality
Communication responsiveness
Repair success rate
Customer satisfaction scores
Providers failing to meet expectations are reevaluated or replaced.
B. Internal Team Performance Metrics
Roam's customer service and account management teams are evaluated on:
SLA adherence
Customer satisfaction scores
Ticket resolution times
First-contact resolution rates
Accuracy and completeness of communication
Exceptional performance is recognized through internal recognition and quality incentives.
C. Customer Feedback Loop
Participating entities can provide feedback on:
Every service interaction
Delivery and maintenance experiences
Training and onboarding quality
Feedback is integrated into Roam's continuous improvement programs.

31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities.	Roam is fully able and committed to providing our products, services, and digital solutions to Sourcewell participating entities across the entire United States, including non-contiguous states and U.S. territories. Our approach combines Roam's core operational capabilities with a network of trusted, vetted third-party partners to ensure broad, equitable access to our fleet solutions. 1. Full Nationwide Access to Digital and Software Services Roam's cloud-based fleet management platform, virtual account management team, and digital ordering tools are available without restriction to participating entities in all 50 states, the District of Columbia, and all U.S. territories. These services include: Online vehicle configuration and ordering Contract pricing, quotes, and documentation Fleet management software and telematics integrations Maintenance scheduling workflows Digital inspections and compliance records Remote training, onboarding, and technical support Because our digital platform is accessible from anywhere, all participating entities receive the same high-quality experience regardless of geography. 2. Physical Vehicle Services Supported by National and Local Networks Roam provides vehicle leasing, delivery, maintenance management, warranty coordination, and other physical fleet services across the United States through a combination of: Roam's internal capabilities and relationships Nationwide dealer and service networks Trusted third-party partners in remote or geographically isolated regions This blended model allows us to serve virtually all participating entities nationwide. 3. Geographic Considerations for Certain Regions While Roam strives to deliver consistent service levels across the country, some regions present inherent logistical challenges that may affect timelines, service availability, or delivery operational models. These include: Hawaii Alaska U.S. Territories such as Puerto Rico, Guam, American Samoa, and the U.S. Virgin Islands Remote or rural regions throughout the continental U.S. In these areas, Roam may rely more heavily on vetted third-party service providers, OEM-authorized facilities, or regional delivery partners. Potential differences may include: Extended delivery or shipping timelines Variations in maintenance or repair turnaround times Limited availability for certain upfits or specialty vehicles Adjusted roadside support response expectations Roam will communicate regional considerations transparently to participating entities during the quoting and onboarding process. 4. Commitment to Collaboration Where Others May Be Better Positioned Roam recognizes that in certain geographies—particularly remote or insular regions—other local vendors may be better positioned to meet immediate or specialized fleet needs. Roam is committed to: Collaborating with regional providers to ensure high-quality service Supporting hybrid delivery models where Roam provides technology and oversight while local partners execute in-market work Coordinating with participating entities to ensure the best overall service outcome Our goal is to deliver reliable solutions while maintaining transparency and flexibility. 5. No Exclusions for Participation Despite regional considerations, Roam does not exclude any U.S. state or territory from service under the proposed agreement. All participating entities are eligible to: Use the contract Access Roam's digital platform Order vehicles and services Receive customer support and training Benefit from Roam's nationwide partner network Roam's mission is to ensure broad access to modern fleet solutions across all U.S. geographies.	*

32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	Roam is fully capable and willing to provide our products and services to Sourcewell participating entities across Canada. Our operational footprint, digital platform, and partnership-based service model allow us to support organizations in every province and territory, regardless of size, location, or fleet complexity. 1. Full Availability of Digital and Software-Based Services Across Canada Roam's cloud-based platform, digital ordering system, and virtual account management services are available without restriction to all Canadian participating entities. This includes: Online vehicle configuration and ordering Digital fleet management software Maintenance scheduling and service workflow tools Telematics integrations Digital documentation and compliance management Virtual onboarding, support, and training Because these services are delivered online, customers in any Canadian region can access the full Roam platform with no degradation in service quality. 2. National Coverage for Vehicle Leasing, Delivery, and Physical Services Roam is committed to serving Canadian entities with the same quality and reliability as U.S. participants. To ensure broad coverage: A. Core Service Areas Roam directly manages or coordinates vehicle leasing, delivery, and fleet operations support throughout: British Columbia Alberta Saskatchewan Manitoba Ontario Québec Atlantic Canada (NB, NS, PEI, NL) B. Northern and Remote Regions For the territories—Yukon, Northwest Territories, and Nunavut—as well as remote northern communities, Roam leverages trusted and vetted third-party partners, OEM networks, and regional service providers to ensure: Vehicle delivery and acceptance Upfitting and equipment installation Maintenance and warranty support Roadside assistance Required inspections and safety services Roam maintains oversight, quality assurance, and service management for all partner-delivered work. 3. Compliance With Canadian Regulatory and Procurement Standards Roam operates in accordance with all relevant Canadian regulations governing: Vehicle leasing and financing Public-sector procurement Safety and compliance inspection requirements Data privacy (including PIPEDA and provincial equivalents) Our fleet platform uses Canadian-friendly data governance practices to ensure compliance with public-sector expectations. 4. Bilingual Support (English and French) Roam is prepared to support Canadian participating entities in both English and French, including: Customer support Training materials Digital documentation Platform interfaces (where applicable) This ensures consistent service quality for entities operating in bilingual environments. 5. Partnerships With OEMs, Upfitters, and Service Networks Across Canada Roam maintains relationships with national and regional partners to support every stage of the fleet lifecycle, including: OEM dealer networks Certified upfitters and installers Maintenance and repair facilities Roadside assistance providers Charging infrastructure partners (for EV programs) These partnerships allow Roam to deliver a comprehensive, end-to-end solution for Canadian public-sector fleets. 6. Commitment to Collaboration and Long-Term Support Roam is committed to serving the Canadian public sector with flexibility and transparency. Where regional challenges exist—such as in remote northern communities—we will: Collaborate with regional service providers Offer hybrid service delivery models Adjust SLAs to reflect geographic realities while maintaining high standards Ensure full alignment with local procurement and compliance expectations Roam's priority is enabling Canadian entities to access reliable, modern fleet solutions regardless of location.	*

33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	Roam intends to provide service coverage across all geographic areas of the United States and Canada under the proposed agreement. Through a combination of our core operational capabilities, digital platform, virtual account management team, and trusted third-party service partners, Roam will make every reasonable effort to support participating entities regardless of location. At this time, there are no regions that Roam categorically excludes from service under this agreement. 1. Universal Coverage Through Core Services and Vetted Partners Roam can fully deliver its software solutions, digital support, training, ordering tools, and virtual account management services to all participating entities across North America without limitation. For physical vehicle services—such as delivery, maintenance, upfitting, or roadside support—Roam supplements its internal capabilities with vetted and qualified third-party providers in remote, rural, or low-density regions. This enables comprehensive nationwide coverage while maintaining quality and reliability standards. 2. Recognition of Regional Variability While Roam strives to provide consistent service levels in all locations, we recognize that: Some regions may have unique logistical constraints (e.g., remote northern Canada, Alaska, Hawaii, U.S. territories). Certain local providers may be better positioned to deliver specialized or time-sensitive physical fleet services. Travel times, shipping timelines, and local market infrastructure may lead to modified SLAs in rare cases. Roam is committed to transparency about any regional limitations and will work with participating entities to set expectations and develop tailored solutions. 3. Willingness to Collaborate With Other Providers Roam is open to collaborative delivery models in geographies where another provider is demonstrably better suited to support a participating entity's needs. This may include: Partnering with regional or local service providers Coordinating joint delivery or maintenance solutions Sharing data, workflows, or best practices to ensure continuity of service Supporting hybrid models where Roam provides technology and oversight while local partners handle in-market execution Roam's priority is ensuring that participating entities receive consistent, reliable service—even if that means working alongside other qualified providers.	*
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.	N/A	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	Roam's fleet management software and digital services are fully available to all participating entities across the United States, including Hawaii, Alaska, and U.S. Territories. However, due to the geographic realities of delivering physical vehicle services and fleet support in remote or non-contiguous regions, certain operational requirements and considerations apply. 1. Software and Digital Services — No Restrictions Roam's cloud-based fleet management platform, digital ordering tools, and virtual account management services are available without limitation to entities in: Hawaii Alaska Guam Puerto Rico U.S. Virgin Islands American Samoa Northern Mariana Islands All digital onboarding, account support, training, and system access can be delivered remotely with no service degradation. 2. Physical Vehicle Delivery, Maintenance, and Upfitting — Third-Party Coordination Required For vehicle delivery, service, and physical fleet support in Hawaii, Alaska, and remote territories, Roam will coordinate with certified third-party providers due to the logistical requirements of operating outside the continental U.S. Services Delivered Through Qualified Partners Vehicle delivery and acceptance Pre-delivery inspection (PDI) Upfitting and equipment installation Preventative and corrective maintenance Warranty and recall coordination Roadside assistance and towing Physical asset recovery or decommissioning Roam maintains quality and performance oversight while local partners fulfill location-dependent services. 3. Additional Lead Time for Vehicle Delivery Due to transportation and shipping constraints, physical vehicle delivery may require extended lead time compared to contiguous U.S. regions.	

		Typical Considerations Marine or barge freight timelines Limited OEM inventory allocation to remote markets Regional upfitting partner availability Seasonal shipping schedules (particularly for Alaska) Roam works with each participating entity to provide accurate delivery estimates and logistics planning. 4. Limited Availability of Certain Vehicle Types or Upfits Some specialty vehicles, heavy upfits, or large-volume orders may have modified availability or extended timelines in remote territories. This is dependent on: OEM distribution policies Port-of-entry constraints Local upfitting capacity Roam will advise participating entities of any vehicle-specific constraints during the configuration and quoting process. 5. Service-Level Adjustments for Physical Support While Roam maintains consistent service standards nationwide, certain KPIs related to physical service delivery may be adjusted for remote geographies, including: Repair or maintenance turnaround times Roadside assistance response times Availability of loaner or replacement units Parts shipping timeframes These adjustments reflect the realities of limited in-market service centers or extended shipping timelines. 6. Warranty and Recall Management in Remote Regions OEM warranty work and recall completion remain fully supported, but may be routed to: OEM-authorized dealers located within the territory Certified partner service centers Regional centers with remote diagnostic capability in cases where no local dealer exists Roam coordinates all scheduling, documentation, and follow-up, ensuring a seamless experience regardless of geography. 7. No Restrictions on Participation Eligibility Despite logistical considerations, there are no eligibility restrictions for participating entities in Hawaii, Alaska, or U.S. Territories. All entities can: Use the contract Access Roam software Order vehicles or services Receive full customer support Access training, onboarding, and account management The only differences relate to delivery timelines and physical service logistics.	*
36	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes	*

Table 4: Marketing Plan (100 Points)

Line Item	Question	Response *	
37	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	Roam will implement a comprehensive, multi-channel marketing strategy to ensure that Sourcewell participating entities—municipalities, public agencies, education institutions, and nonprofit organizations—are aware of the fleet leasing and vehicle management solutions available to them under this contract. Our approach emphasizes education, accessibility, and clear communication of program value. 1. Co-Branded Awareness Campaign Roam will collaborate with Sourcewell's marketing team to develop clear, co-branded communications that highlight: Contract benefits for participating entities Available vehicle programs (lease, rental, EV transition support, fleet management) How to purchase through the awarded contract Support available to members Channels Co-branded digital brochures Contract summary sheets Website landing pages Joint email announcements Webinar invitations This ensures consistent messaging and broad visibility across the entire Sourcewell membership. 2. Digital Marketing & Web Presence Roam will deploy a targeted digital marketing program designed to reach public-sector decision-makers.	

		Tactics Dedicated Contract Webpage: A Sourcewell-specific landing page detailing contract scope, pricing models, services, and how to get started. SEO & Content Strategy: Articles, guides, and FAQs optimized for public-sector fleet keywords (e.g., "government fleet leasing," "municipal EV transition support"). Email Campaigns: Segment-specific communications for fleet managers, procurement teams, and operations personnel. Paid Digital (Optional): Google Ads and LinkedIn campaigns to increase visibility among public-sector audiences. 3. Direct Engagement With Participating Entities Roam will use direct outreach channels to ensure participating entities are aware of new services available under the contract. Tactics Email and phone outreach conducted by Roam's Government & Commercial Partnerships team Personalized briefings for high-priority agencies Regional and statewide presentations for public-sector associations Participation in strategic planning meetings with large agencies Our sales and partnership teams are trained to articulate contract benefits, expedite onboarding, and support procurement compliance. 4. Education-Driven Outreach Roam will emphasize education and thought leadership to support public-sector fleet operators in adopting modern fleet solutions. Tactics Webinars & Workshops: Topics such as EV adoption, fleet electrification planning, maintenance optimization, and total-cost-of-ownership strategies. Training Sessions: Demonstrations of Roam's fleet management platform and digital tools. Case Studies & Whitepapers: Highlighting successful fleet modernizations, efficiency gains, and sustainability outcomes. This positions Roam as a trusted advisor and resource—not just a supplier. 5. Industry Events & Conferences Roam will actively represent the Sourcewell contract at relevant public-sector and fleet industry events. Examples Government fleet management conferences Municipal and county association meetings Educational procurement consortiums Sustainability and EV infrastructure expos These events provide exposure to a broad network of potential Sourcewell users. 6. Localized Member Support & Communication Roam will maintain ongoing communications with participating entities after initial outreach, ensuring high long-term engagement. Tactics Quarterly newsletters with fleet insights and updates Onboarding support packages for new members Regional ride-and-drive events featuring available vehicles Updates regarding new vehicle categories, EV programs, or service expansions This sustained engagement ensures that the contract remains top-of-mind and useful for entities of all sizes. 7. Commitment to Co-Marketing With Sourcewell Roam is committed to aligning marketing efforts with Sourcewell's communication standards and brand guidelines. We will: Participate in Sourcewell member communications Ensure contract details are clearly represented on Roam's website Provide Sourcewell with updated materials as products and services evolve Support mutual promotional opportunities at events or online This partnership-first approach ensures consistent messaging and broad awareness across	*
38	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	Roam employs a data-driven, technology-enabled marketing strategy designed to reach public-sector audiences efficiently and responsibly. Our approach uses digital analytics, targeting tools, and modern communication platforms to increase awareness of available fleet solutions while ensuring alignment with procurement standards and ethical data practices. 1. Data-Driven Audience Targeting and Segmentation Roam uses secure, compliant marketing tools to segment audiences and tailor messaging to the needs of government fleet managers, procurement officers, and operational leaders. How it works CRM-driven segmentation: Contact and engagement data are managed through Roam's CRM to identify relevant public-sector decision-makers. Persona-based targeting: Messaging is tailored to groups such as fleet supervisors, procurement departments, facility managers, and sustainability teams. Optimization based on engagement data: Email open rates, click-through patterns, and content interaction inform continuous refinement of outreach strategies. This ensures participating entities receive communications that are relevant, timely, and mission-focused.	

		2. Digital Analytics & Website Intelligence Roam leverages advanced analytics platforms to measure and improve the effectiveness of digital content and campaigns. Tools & Techniques Web analytics (Google Analytics / GA4): Tracks page performance, search behavior, and content interaction. Heatmapping and UX tools: Identify areas of friction to improve contract-related page usability. Conversion tracking: Measures how well different messages and landing pages drive inquiries and onboarding. Insights from these tools enable Roam to consistently improve how Sourcewell members discover, evaluate, and adopt fleet solutions. 3. Social Media Intelligence and Targeted Public-Sector Outreach Roam uses professional social platforms—especially LinkedIn—to reach public-sector audiences, leveraging each platform's data capabilities in a responsible way. Capabilities Targeted paid campaigns aimed at government, education, and nonprofit sectors. Engagement analytics measuring reach, relevance, and message resonance. A/B testing of creative assets, messaging frameworks, and calls to action. Thought leadership distribution (case studies, fleet insights, EV adoption guidance). This generates awareness and positions Roam as a trusted advisor in modern fleet management. 4. Metadata Usage and Content Optimization Roam uses structured metadata to ensure content is discoverable, compliant, and relevant. Key practices Search engine optimization (SEO): Metadata-rich landing pages increase visibility for terms related to government fleet leasing, electrification, and maintenance programs. OpenGraph and structured data: Ensures contract materials display clearly across digital platforms. Accessible content standards (WCAG-oriented): Metadata supports screen readers, multi-device layouts, and compliance with accessibility requirements. Metadata usage enhances user experience and ensures Sourcewell entities can easily find and navigate relevant information. 5. Marketing Automation & Personalized Entity Journeys Roam employs modern marketing automation platforms to streamline communication and ensure outreach remains consistent and informative. Features Automated onboarding campaigns that guide new entities through next steps. Lifecycle nurturing sequences that provide ongoing educational resources, case studies, and program updates. Triggered communications based on entity engagement—web visits, content downloads, webinar attendance, etc. Automation ensures every participating entity receives the information they need at the right time. 6. Ethical and Responsible Use of Data Roam adheres to strong governance, privacy, and compliance standards. All marketing data usage is: Opt-in and permission-based Fully compliant with applicable privacy laws Used only for legitimate business and member-education purposes Stored securely with role-based access controls Roam does not use consumer-style tracking technologies inappropriate for the public sector and maintains full transparency in its marketing practices. 7. Continuous Improvement Through Performance Dashboards Roam uses internal dashboards that consolidate: Campaign performance metrics Content engagement Social media insights Lead and onboarding trends Regional adoption patterns These dashboards guide strategic adjustments, ensuring Roam remains responsive to Sourcewell member needs and market conditions.	*

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?	Roam views Sourcewell as a strategic partner whose role is to: 1. Provide a Trusted, Compliant Procurement Vehicle Sourcewell enables governmental, educational, and nonprofit organizations to procure fleet leasing and vehicle management services efficiently and transparently. By completing the competitive solicitation process on behalf of its members, Sourcewell reduces administrative burden and accelerates access to high-quality solutions. 2. Raise Awareness of Available Contracts Across Member Organizations Sourcewell communicates awarded agreements through its established channels, including its website, newsletters, member outreach programs, and education initiatives. This ensures participating entities understand the contract scope, benefits, and eligibility requirements. 3. Support Member Adoption Through Education and Relationship Management Sourcewell serves as a centralized resource for agencies seeking guidance on contract use, procurement compliance, vendor capabilities, and service options. This supports confident purchasing and helps agencies navigate complex acquisition decisions. Roam's Integration of the Sourcewell Agreement Into Our Sales Process Roam will fully align internal sales, onboarding, and customer success processes with the awarded Sourcewell contract to ensure smooth adoption and consistent messaging. 1. Contract Enablement Across Roam's Organization Upon award, Roam will implement a structured internal rollout that includes: Contract training for sales, customer success, operations, and marketing teams Integration of Sourcewell pricing, terms, and eligibility criteria into our CRM and quoting tools Creation of standardized Sourcewell proposal templates and ordering workflows Development of a dedicated Sourcewell resource hub for internal teams This ensures every customer-facing team member can clearly explain the contract benefits and navigate the procurement process. 2. A Dedicated Sourcewell Sales & Support Pathway Roam will establish a defined sales pathway specifically for Sourcewell members, including: Dedicated account managers trained on the agreement Standardized contract-specific order forms and documentation A streamlined onboarding process tailored to public-sector procurement Digital ordering tools incorporating Sourcewell pricing and scope A virtual account management team to guide agencies through their first orders This ensures a consistent, efficient, contract-aligned purchasing experience. 3. Co-Branded Sales and Marketing Integration Roam will collaborate with Sourcewell to create co-branded materials and campaigns that support awareness and adoption. These may include: A Sourcewell-specific landing page on Roam's website Co-branded brochures, one-pagers, and contract summaries Webinars and educational sessions for Sourcewell members Joint attendance at public-sector fleet events and conferences This approach reinforces the credibility and ease of procurement that the Sourcewell partnership provides. 4. Sales Process Workflow Under the Sourcewell Contract A typical Sourcewell-integrated sales process at Roam will follow these steps: Inquiry: A participating entity contacts Roam directly or through Sourcewell. Eligibility Confirmation: Roam verifies membership status and contract applicability. Needs Assessment: Roam's account managers identify fleet requirements, timelines, and service needs. Configuration & Quoting: Vehicles, upfits, services, and technology solutions are configured under Sourcewell pricing and terms. Digital Approval & Procurement: Roam provides all required contract documentation for internal agency approval. Order Placement: The agency submits its order through Roam's digital platform or its internal procurement system. Implementation & Rollout: Roam coordinates delivery, training, maintenance setup, and ongoing support. Ongoing Relationship Management: Quarterly reviews, performance updates, and lifecycle planning ensure long-term value. 5. Continuous Collaboration With Sourcewell Roam will maintain ongoing communication with Sourcewell's team to: Share adoption metrics Identify emerging member needs Align on marketing and education efforts Update materials and processes as services evolve Ensure continued compliance with contract requirements This collaborative approach ensures consistent quality and long-term program success.	*

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.	1. Roam's Online Fleet Ordering & Management Platform Roam provides a secure, cloud-based platform that allows public-sector entities to order vehicles, services, and related fleet solutions with the speed and transparency expected from modern e-procurement. Key Capabilities Digital Vehicle Configuration: Users can select vehicles, trims, options, upfitting packages, lease terms, and service plans directly through the portal. Instant Quote Generation: Entity-specific contract pricing and terms are displayed in real time, enabling clear and compliant sourcing decisions. Online Approvals & Authorization: Orders can be routed internally for approval, enabling procurement, finance, and fleet teams to collaborate digitally. Order Tracking: Real-time visibility into order status, production updates, preparation work, and delivery timelines. Integrated Lifecycle Tools: Once delivered, vehicles can be managed for maintenance, inspections, telematics, renewals, and reporting—all within the same platform. This unified platform eliminates paper-based processes and reduces administrative time for participating entities. 2. Virtual Account Management & Guided Digital Procurement Roam supplements its online platform with a dedicated virtual account management team that supports public-sector customers through every step of the procurement process. How the Virtual Account Team Supports E-Procurement Guided Digital Ordering: Account managers help users build configurations, compare options, and assemble compliant order packages. Procurement-Aligned Documentation: Quotes, specifications, and compliance materials are provided digitally for internal review and approval. Accelerated Turnaround: Digital communication channels enable faster clarification, approvals, and order submission. Ongoing Support: The same team assists after order placement with delivery coordination, warranty support, maintenance planning, and lifecycle guidance. This virtual support model provides the responsiveness of a dedicated representative with the efficiency of a fully digital process. 3. How Public-Sector Customers Use Roam's E-Procurement Capabilities Government and educational organizations leverage Roam's online and virtual procurement model to: Simplify Ordering Build complete orders online without needing in-person meetings Access contract pricing and options instantly Create standardized vehicle and service packages for repeat use Maintain Compliance Maintain digital audit trails of quotes, approvals, and documentation Ensure orders align with contract terms and governance requirements Store all procurement records in a centralized online location Enhance Transparency & Speed Reduce order cycle times through virtual guidance Monitor delivery progress in real time Track fleet readiness, maintenance, and renewals through a single platform 4. A Fully Digital, End-to-End Procurement Experience Roam's e-procurement model is designed for public-sector entities seeking a modern, simple, and transparent way to acquire vehicles and fleet services. End-to-End Digital Workflow Configure vehicles and services online Generate quotes instantly Route orders for internal approval digitally Submit orders electronically Track production, upfitting, and delivery in real time Manage fleet operations through the same system This model eliminates manual steps, reduces administrative workload, and ensures a consistent, compliant procurement experience.	*

Table 5A: Value-Added Attributes (100 Points, applies to Table 5A and 5B)

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	Roam provides comprehensive training programs to support safe vehicle operation, effective fleet management, and efficient use of Roam's technology platform. Training is available for drivers, fleet administrators, maintenance personnel, and operational supervisors. Our programs are designed to ensure that participating entities can confidently operate and manage their fleets from day one. 1. Overview of Training Offerings Roam offers training in the following categories:	

	costs that apply.	Vehicle Operation & Safety Training Equipment & Upfitting Training Maintenance Procedures & Program Orientation Fleet Management Software Training Electrification & EV Charging Training (if EVs included) Ongoing Education & Refresher Programs Training can be delivered in person, virtually, or through self-paced digital materials, depending on the needs of the participating entity. All core training related to vehicle delivery, fleet onboarding is $150 to $350 per session. Additionally, travel and meal costs are added in when performed in-person. All software related training done virtually is provided at no additional cost. 2. Vehicle Operation & Safety Training Description Roam provides standardized operator training for all vehicle types supplied through the program. Training ensures safe usage, compliance with OEM recommendations, and proper handling of specialized features. Who Provides It Training is delivered by: Roam Fleet Operations staff OEM-certified dealer partners (for specialized models or equipment) Topics Covered Safe vehicle operation and defensive driving principles Vehicle controls, features, and onboard technology EV-specific operation (if applicable) Pre-trip inspections and basic vehicle care Incident, breakdown, and roadside assistance procedures Cost $150 to $350 per session + travel and meal costs when performed in-person. 3. Equipment & Upfitting Training Description When vehicles are delivered with upfitting or aftermarket equipment (e.g., shelving, racks, lighting, telematics hardware), Roam provides operator and supervisor-level instruction. Who Provides It Specialized Roam partners OEM or aftermarket installers Certified equipment technicians Topics Covered Proper operation of installed equipment Safety protocols and load-management best practices Troubleshooting common equipment issues Warranty considerations for installed components Cost $150 to $350 per session + travel and meal costs when performed in-person. Additional customized training available on request (quoted on a per-session basis). 4. Maintenance Program & Fleet Technician Training Description Roam offers training to ensure participating entities understand their preventative maintenance schedules, maintenance workflows, warranty processes, and standards for reporting mechanical issues. Who Provides It Roam Maintenance Program Specialists OEM service advisors Topics Covered OEM-recommended maintenance intervals How to schedule service through Roam or authorized networks Warranty identification and escalation Required documentation and reporting procedures Telematics-driven maintenance alerts (if applicable) Cost $150 to $350 per session + travel and meal costs when performed in-person. 5. Fleet Management Software Training Description Roam provides comprehensive training on its fleet management technology platform to ensure seamless adoption and ongoing operational efficiency. Who Provides It Roam's Fleet Technology & Product Training Team	*

		Dedicated Customer Success Manager (CSM) assigned to the participating entity Training Formats Live instructor-led sessions (virtual or in-person) Interactive onboarding workshops Self-paced training videos and documentation On-demand support through Roam's help center Topics Covered Vehicle ordering and deployment workflows Maintenance logging and service scheduling Driver and asset management Reporting, analytics, and compliance features Optional modules: reservation management, telematics, fuel/charging monitoring, inspections, and sustainability reporting Cost Included at no charge for all users under the contract. Advanced configuration or integration training is available as an optional service. 6. Electrification & EV Charging Training Description Roam offers specialized training for organizations adopting electric vehicles or hybrid fleets. Who Provides It Roam EV Specialists OEM EV trainers Approved charging infrastructure partners Topics Covered EV operation & safety Charging procedures at depots or public stations Battery health & longevity best practices Cold-weather and high-load operation considerations Charging infrastructure usage, monitoring, and maintenance Cost $150 to $350 per session + travel and meal costs when performed in-person. Charging infrastructure operations training depends on the specific hardware installed. 7. Ongoing Education, Refresher Courses & Change Management Description Roam provides continuous education options to ensure long-term success of participating entities. Offerings Annual refresher training (virtual or onsite) Fleet program updates and new feature releases New driver/operator onboarding Policy or compliance training as fleet needs evolve Optional bi-annual executive business reviews with training reinforcement Cost Basic refresher training included; enhanced programs can be optionally added based on scope. 8. Training Delivery Standards Regardless of training type, Roam adheres to the following standards: Training delivered within 10 business days of vehicle deployment or program kickoff All training materials accessible digitally 24/7 Assessments or knowledge checks included for operators (if required) Minimum satisfaction target of 4.7/5 for all sessions Custom training plans available for multi-department or multi-site fleets	
42	Describe any technological advances that your proposed Solutions offer.	Roam's solution integrates modern vehicle technology, intelligent fleet management systems, and automation-first operations to deliver a highly efficient, data-driven fleet program. Our platform and operational model are built to exceed traditional leasing workflows through real-time insights, automation, and seamless digital experiences for both drivers and administrators. 1. Unified Fleet Management Platform with Real-Time Data Roam provides a single, cloud-based platform that consolidates vehicle leasing, maintenance, telematics, charging, and reservations into one interface. Unlike legacy systems that rely on siloed tools and manual processes, Roam's platform offers: Real-time fleet visibility across utilization, maintenance, health, compliance, and charging status Integrated reservation and booking workflows for organizations managing internal motor pool	

programs
End-to-end lifecycle data, from acquisition to remarketing
Secure, cloud-native architecture ensuring 99.9%+ uptime and modern performance standards
This unified system reduces administrative overhead, improves transparency, and accelerates decision-making.
2. Automation-Driven Maintenance & Lifecycle Management
Roam leverages telematics, predictive analytics, and rule-based automation to enhance maintenance efficiency and vehicle longevity.
Key advances
Automatic maintenance scheduling triggered by telematics indicators (mileage, engine alerts, battery thresholds)
Predictive maintenance models that identify early warning patterns and prevent costly breakdowns
Digital maintenance workflow for approvals, service tracking, cost reporting, and compliance
Real-time service alerts and health monitoring for proactive fleet interventions

This automation reduces downtime and ensures vehicles remain compliant and safe throughout their lifecycle.
3. Advanced Electrification & Charging Intelligence (if EVs are included in scope)
Roam's EV-ready framework supports government entities transitioning from ICE fleets to hybrid and fully electric platforms.
Technological advances
Battery health analytics to predict long-term performance and optimize replacement planning
Charging schedule optimization to reduce energy costs and maximize vehicle availability
Charging infrastructure integration supporting depot, workplace, and public networks
Driver support tools including route planning based on charging station availability, weather, and load

These capabilities help public-sector fleets adopt EVs with confidence, clarity, and long-term sustainability benefits.
4. Intelligent Document Processing for Fleet Administration
Roam incorporates AI-assisted tools to reduce administrative load across vehicle onboarding and financial management. *
Capabilities
Automated extraction of key fields from lease agreements, invoices, registration documents, and inspection reports
Structured data validation reducing manual entry errors
Centralized digital document repository linked to each vehicle's lifecycle
Workflow automation for finance, compliance, and audit readiness
This reduces back-office effort and improves record accuracy across the fleet.
5. Driver & Operator Mobile Tools
Roam's mobile-first tools improve support for drivers, field staff, and fleet operators.
Features
Mobile inspections with photo/video documentation and real-time syncing
Digital proof-of-delivery and return workflows
Mobile reservation and dispatch system for internal motor pool management
Real-time status updates on maintenance, roadside assistance, and vehicle readiness

These tools modernize field operations and improve service responsiveness across distributed teams.
6. Telematics, Safety Intelligence & Compliance Automation
Roam integrates optional telematics hardware and software directly into the fleet platform, offering enhanced operational intelligence.
Advances
High-accuracy location and trip data
Automated incident detection (harsh braking, collision alerts, off-hours use)
Compliance automation for inspections, licensing, and renewal reminders
Fuel and EV charging monitoring for cost optimization
The system improves fleet safety, reduces risk, and gives government entities better visibility into driver behavior and asset utilization.
7. Data Visualization, Reporting & Sustainability Intelligence
Roam provides powerful reporting capabilities tailored for public-sector requirements.
Key capabilities
Custom dashboards for utilization, cost trends, maintenance status, and service history
Emissions and sustainability tracking for mixed ICE/EV fleets
Lifecycle cost modeling and optimal replacement recommendations
Exportable reports suitable for audits, budget planning, and council/board presentations
These insights help participating entities make more informed, data-driven decisions.
8. Continuous Improvement Through Agile Product Development
Roam's technology platform is built and improved using an agile development process, ensuring that participating entities benefit from ongoing enhancements.
Standards
Bi-weekly product releases

		Rapid iteration on user feedback Custom feature development pathways for high-priority public sector needs API integrations for fuel cards, charging networks, accounting software, and telematics This results in a future-proofed solution that evolves alongside government fleet needs.	
43	Describe any “green” initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.	• ISO 14001 Environmental Management Framework Alignment Roam’s sustainability and operational workflows follow principles consistent with ISO 14001, emphasizing continuous environmental performance improvement. • GHG Protocol & ESG Reporting Principles Roam’s emissions insights and sustainability metrics are modeled using methodologies consistent with the Greenhouse Gas Protocol, supporting ESG reporting frameworks used by public-sector and corporate fleets. • CDP (Carbon Disclosure Project)–Informed Tracking Roam’s emissions reporting and environmental dashboards use data elements consistent with the disclosure categories reviewed by CDP for carbon impact. • UN Sustainable Development Goals (SDG) Alignment Roam’s electrification support, emissions reduction tools, and recycling programs align with SDG goals—particularly SDG 7 (Clean Energy), SDG 11 (Sustainable Cities), and SDG 13 (Climate Action). • Veritree-Aligned Environmental Restoration Practices Roam supports sustainability practices that mirror Veritree’s principles for traceable environmental restoration projects and measurable ecological impact. • DRIVE Clean / DRIVE Ontario Principles Roam’s EV transition modeling and emissions reduction strategies align with provincial clean transportation initiatives such as DRIVE Clean Ontario and regional low-carbon mobility standards. • EPA SmartWay-Informed Fleet Efficiency Principles Roam’s sustainability analytics (idling reduction, route optimization, and emissions modeling) follow methodologies consistent with EPA SmartWay freight-efficiency tools. • Responsible Recycling (R2)-Aligned Vendor Practices Our service network uses recycling practices modeled after R2 and state/provincial environmental recycling standards, covering tires, batteries, fluids, and components. • ENERGY STAR & UL/CSA Compliance for Charging Infrastructure EV charging partners follow recognized standards such as ENERGY STAR, UL, and CSA for safety and energy efficiency.	*
44	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.	• ISO 14001 environmental management principles • GHG Protocol–aligned emissions tracking • EPA SmartWay–informed efficiency methodologies • ENERGY STAR / UL / CSA standards (via EV charging partners) • R2-aligned recycling practices (through vendor network) • Veritree-style environmental restoration tracking principles • Clean transportation guidelines (DRIVE Clean / DRIVE Ontario)	*
45	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	Roam offers a modern, technology-forward approach to fleet leasing and management that is fundamentally different from traditional fleet providers. Our model blends advanced digital tools, end-to-end lifecycle management, and high-touch operational support designed for public-sector reliability, transparency, and long-term value. 1. A Unified Technology + Operations Model Most fleet leasing providers rely on third-party systems or manual processes. Roam delivers a vertically integrated technology-and-operations platform that manages the entire lifecycle of every vehicle—from acquisition to maintenance to remarketing. Why it’s unique One system manages ordering, delivery, maintenance, telematics, inspections, reservations, charging, and reporting Eliminates the need for multiple vendors and siloed systems Enhances transparency, reduces administrative workload, and ensures consistent service quality This integrated approach provides Sourcewell entities with a single partner accountable for the entire fleet experience. 2. Modern, Cloud-Based Fleet Management Software Built In-House Roam’s in-house fleet management platform is designed for modern public-sector workflows—not retrofitted from legacy systems. Unique Benefits Real-time fleet visibility Automated maintenance triggers and workflow routing Digital inspections, condition reports, and compliance tracking Mobile tools for drivers, supervisors, and field teams Fast iteration and continuous product improvements This allows Sourcewell entities to experience a fleet solution that is faster, more intuitive, and	

		more transparent than traditional offerings. 3. EV-Ready and Electrification-Focused Fleet Expertise Roam was founded with an EV-forward vision. We support entities transitioning to electric and hybrid fleets with data, tools, and infrastructure guidance. Unique Benefits Battery health analytics and end-of-life forecasting Charging infrastructure planning & management Charging optimization for cost and uptime Mixed ICE/EV fleet support under one system This positions Roam as a future-ready partner for municipalities and agencies aiming to meet emissions reduction targets. 4. High-Touch Service Backed by Data and Automation Roam blends responsive human support with automated workflows to reduce downtime and improve fleet reliability. Differentiators Rapid SLA-driven support for repairs, maintenance, and warranty work Predictive maintenance built on telematics data Centralized coordination of OEM warranty work Real-time service updates and maintenance logs The result is a more reliable and predictable fleet experience for participating entities. 5. Seamless Lifecycle Management — from Acquisition to Remarketing Roam provides complete lifecycle management, ensuring vehicles are procured, managed, serviced, and disposed of efficiently. Unique Advantages Data-driven acquisition recommendations Upfitting and prep services managed end-to-end Ongoing performance and cost tracking Optimal replacement modeling for long-term savings This ensures Sourcewell entities maximize value while minimizing operational complexity. 6. Flexible Leasing, Rental, and Short-Term Mobility Programs Roam offers flexible vehicle programs to meet diverse public-sector needs—from long-term leasing to rapid deployment of short-term rental units for peak season or emergency use. Benefits 4-hour rapid delivery in supported regions Seasonal or project-based scaling Coverage for mission-critical downtime scenarios Straightforward rate structures This flexibility allows entities to right-size their fleets without long-term financial commitments. 7. Integrated Document, Compliance, and Financial Management Tools Roam provides built-in tools to streamline recordkeeping, compliance, and financial reporting. Unique Features AI-powered document extraction for contracts, invoices, registrations, and inspections Automated compliance reminders (licensing, safety, inspections) Fleet-level cost visibility and budget forecasting Exportable reports for audits, board meetings, and regulatory requirements This reduces administrative overhead and improves accuracy in key compliance areas. 8. A Modern Approach to Customer Support Roam's support model is designed to be proactive, not reactive. Unique Attributes Dedicated Customer Success Manager Multi-channel support (chat, phone, email, in-platform) Real-time vehicle health alerts Quarterly business reviews and optimization planning This ensures Sourcewell participants have a responsive partner invested in their success. 9. Built for Growth, Innovation, and Public-Sector Requirements Roam's solution is intentionally designed to scale with evolving fleet needs and regulatory landscapes. What sets us apart Bi-weekly product releases and continuous enhancements APIs and integrations with public-sector systems Strong governance, auditability, and data security EV, sustainability, and reporting capabilities aligned with government mandates This positions Roam uniquely in an industry that traditionally evolves slowly.	*
46	Describe in detail any facilitation or support services offered when OEM warranty work is required for vehicle acquired via your offering.	Roam provides comprehensive coordination and support services for all OEM warranty work required on vehicles acquired through our fleet leasing and management offering. Our process ensures minimal downtime, transparent communication, and consistent adherence to manufacturer requirements. The following describes our end-to-end support approach in detail. 1. Warranty Issue Identification and Triage Roam proactively monitors vehicle health through customer reports, telematics (if included), and maintenance activity logs. Key Actions Initial Assessment: Upon receiving a warranty-related concern, Roam performs a preliminary remote diagnostic review to confirm whether the issue is covered under the OEM warranty. Safety First Protocol: If the issue presents a safety risk, the vehicle is immediately grounded and replacement or temporary rental options are provided (if part of the awarded program). Documentation Collection: Roam assembles required OEM documentation, including service	

		history, DTC codes, mileage logs, driver notes, and telematics alerts. 2. Scheduling and Coordination with Authorized OEM Service Centers Roam handles the full coordination of warranty appointments to reduce administrative burden for participating entities. Key Actions Authorized Facility Matching: Vehicles are routed only to OEM-authorized or certified service centers to maintain warranty validity. Priority Scheduling: Roam maintains relationships with national dealer networks and service partners, enabling prioritized appointment scheduling for fleet customers. Pickup & Drop-Off Options: Where applicable, Roam provides or arranges logistics support, including: Pick-up and delivery of the vehicle Mobile technician dispatch (if offered by OEM) Shuttle or loaner arrangements 3. Communication, Approval Management, and Transparency Roam serves as the primary point of contact with the OEM dealer, ensuring that repairs are completed properly and efficiently. Key Actions Single Point of Contact: Roam communicates directly with the service center, eliminating operational burden on the participating entity. Transparent Communication: Updates on diagnosis, repair scope, and expected completion times are communicated to authorized stakeholders in real-time through Roam's fleet management platform. Non-Warranty Items: If work outside warranty coverage is recommended, Roam obtains approval from the participating entity before authorizing any non-warranty costs. Paperwork & Claims Processing: Roam manages all OEM warranty claim submissions, documentation, and follow-up. 4. Vehicle Return to Service and Quality Assurance Roam ensures that all warranty work is completed to OEM standards before the vehicle is returned to the fleet. Key Actions Post-Repair Quality Check: A documented QA process verifies that repairs were completed correctly and no new issues were introduced. Maintenance Record Updating: All warranty actions are logged into Roam's fleet management system, maintaining an accurate lifecycle service record. Driver/Entity Notification: Roam notifies authorized users when the vehicle is ready and provides any OEM service reports or repair documentation. 5. Preventative Support and Warranty Optimization Roam helps participating entities maximize warranty value and reduce long-term maintenance costs. Standards & Enhancements Warranty Expiration Tracking: Automated alerts notify administrators of upcoming warranty milestones, preventing missed claims. Recurring Health Monitoring: Telematics-driven diagnostics proactively identify components at risk of failure. OEM Recalls & Service Campaigns: Roam tracks active recalls and coordinates recall services at no cost to the participating entity. 6. Service Guarantees and Performance Standards Roam's OEM warranty support services adhere to measurable service levels: Initial response to warranty inquiries: < 2 business hours Scheduling of OEM warranty appointments: Within 1 business day Communication cadence: Real-time updates through platform + daily summaries for active repairs Documentation closure: All repair artifacts uploaded to the fleet platform within 24 hours of vehicle return 7. Optional Value-Added Support (If included in contract award) Courtesy replacement vehicles for mission-critical fleets Roadside support for towing to the nearest OEM authorized facility On-site mobile service when OEM programs allow Consolidated warranty reporting for compliance and budgeting	*
47	Describe any service standards or guarantees that apply to your services (policies, metrics, KPIs, etc.).	Roam is committed to delivering high-reliability fleet leasing and management services supported by measurable performance standards, transparent reporting, and continuous improvement. Our service philosophy is built on availability, safety, responsiveness, and operational excellence across both our physical fleet operations and our fleet management technology platform. 1. Vehicle and Service Standards	

1.1 Vehicle Quality & Readiness Standards
Roam guarantees that all vehicles provided to Sourcewell participating entities meet or exceed OEM specifications and are delivered in optimal operating condition.
Standards & KPIs
Pre-Delivery Inspection (PDI): 100% of vehicles undergo a documented multi-point inspection before handover.
Vehicle Cleanliness: Vehicles delivered to “ready-for-service” cleanliness inside and out, with QA spot checks on 10% of deliveries.
Accessory / Upfitting Accuracy: 99% accuracy rate on all factory or aftermarket installation requirements.
Initial Defect Rate: Less than 1% of new-vehicle deliveries require corrective action within the first 30 days.

1.2 Preventative Maintenance & Repair Standards
Roam’s maintenance and repair programs prioritize uptime, safety, and lifecycle longevity.
Maintenance can be completed through Roam-operated facilities or certified partner networks.
Standards & KPIs
Preventative Maintenance Compliance: ≥ 95% of vehicles remain on schedule for OEM-recommended intervals.
Repair Turnaround Time:
Light mechanical repairs: 72 hours average turnaround.
Critical safety repairs: 24 hours (or immediate grounding if unsafe).
Maintenance Cost Transparency: Detailed line-item reporting for 100% of maintenance events.
Roadside Response Times:
Urban areas: 30–45 minutes
Suburban/rural: 45–90 minutes
EV charging assistance provided when applicable.
1.3 Safety, Inspections & Compliance
Roam maintains strict safety and compliance standards aligned with provincial/state regulations and internal best practices.
Standards & KPIs
Annual Safety Inspections: 100% compliance.
Incident Reporting: All incidents logged within 24 hours with recommended corrective actions.
Telematics-Based Monitoring:
High severity alerts responded to within 15 minutes.
Usage-based maintenance automatically scheduled from telematics thresholds.
1.4 Customer Support & SLA Commitments
Roam provides structured service levels for all participating entities.
Standards & KPIs
Service Desk Support SLA:
Response: <2 hours during business hours
Resolution or action plan: <24 hours
Fleet Delivery Timelines:
Standard vehicles: 10–15 business days from order confirmation (subject to OEM availability)
Urgent/short-term rentals: under 4 hours in supported markets
Customer Satisfaction:
Target CSAT: 4.7/5 or higher
Quarterly service reviews included at no cost

*

2. Software Platform & Technology Standards
Roam’s fleet management platform is designed for operational reliability, transparency, and security. It supports reservation workflows, maintenance records, compliance tasks, telematics integrations, and reporting for internal and government fleet operators.
2.1 System Availability & Performance
Roam maintains a modern cloud-based architecture with high availability and failover capabilities.
Standards & KPIs
System Uptime Guarantee: ≥ 99.9% monthly uptime
API Response Times: 95th percentile under 300ms
Scheduled Maintenance: Conducted during low-usage windows with at least 24-hour notice

2.2 Data Integrity, Reliability & Security
Roam adheres to industry best practices in data governance, privacy, and cybersecurity.
Standards & KPIs
Daily Automated Backups with multi-region redundancy
AES-256 data encryption at rest and TLS 1.2+ in transit
Role-Based Access Control (RBAC) for all users
Annual penetration testing conducted by a certified third party
Logging & Audit Trails: 100% of actions on key assets tracked

2.3 Support, Issue Resolution & Continuous Improvement
Roam provides responsive technology support and maintains a structured product

		improvement process. Standards & KPIs Technical Support Response: P1 (Critical): < 1 hour response P2: < 4 hours response P3: < 1 business day Bug Fix Targets: P1: 24 hours P2: 5 business days Release Cadence: Bi-weekly stable releases with planned improvements User Feedback Loop: Feature request evaluations within 10 business days 2.4 Telematics & Data Accuracy (If applicable to the proposal) If telematics is included in the offering: Standards & KPIs Location Accuracy: ≤ 3 meters Diagnostic Code Detection: 95% reliability on major DTC categories Real-Time Data Frequency: Updates every 15–60 seconds Fuel & EV Battery Reporting Accuracy: > 95% 3. Service Guarantees Roam provides the following guarantees to participating entities: Vehicle readiness guarantee: Every vehicle delivered will be safe, compliant, and fully inspected before deployment. Uptime & availability guarantee: Roam will maintain ≥ 99.9% availability for critical fleet management functions. Transparency guarantee: All maintenance, costs, and lifecycle data will be available through unified reporting. Responsiveness guarantee: Service requests receive an initial response within defined SLA windows, backed by real-time status tracking.	

Table 5B: Value-Added Attributes

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

Table 6A: Pricing (400 Points, applies to Table 6A, 6B, 6C, 6D, 6E)

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *	
57	Describe your payment terms and accepted payment methods.	Roam provides flexible and transparent payment terms to support the operational needs of public-sector agencies. Standard terms are Net 30 days from invoice date, with Net 45 or Net 60 available upon request and aligned with the participant's procurement policies. Lease billing can be structured monthly, quarterly, or annually based on agency preference. Roam accepts a wide range of payment methods, including ACH electronic payments, wire transfer, check, purchasing cards (P-Cards), and credit cards. Credit card payment is also supported for short-term rentals, temporary fleet needs, and other shorter-duration services to ensure rapid deployment and ease of use. Under the parent agreement, agency employees are eligible to obtain rental vehicles, and these transactions can be categorized as customer-pay, allowing them to be processed independently while still benefiting from the contract's pricing structure and terms. These payment options are designed to provide flexibility, compliance, and convenience across all types of fleet-related transactions.	*

58	Describe any leasing or financing options available for use by educational or governmental entities.	Roam offers a full range of leasing and financing options specifically structured to meet the budgetary, regulatory, and operational requirements of educational and governmental entities. These options include: Operating Leases Structured to preserve capital and provide predictable payments, with terms typically ranging from 24–72 months. Operating leases help agencies avoid large upfront expenditures and maintain flexibility in vehicle replacement cycles. Capital/Finance Leases For entities that prefer to treat vehicles as owned assets, capital leases provide full amortization and ownership-transfer pathways at end of term. These structures align with public-sector accounting standards and long-term asset planning. Open-End Fleet Leases Designed for agencies seeking maximum flexibility, open-end leases allow mileage and usage variances and provide settlement based on actual vehicle resale value. These programs help optimize lifecycle costs for diverse or high-utilization fleets. Closed-End Leases Ideal for predictable duty cycles such as administrative or campus vehicles. Payments are fixed with no end-of-term market risk, reducing budgeting uncertainty for schools and government entities. Tax-Exempt Lease Purchase (TELP / Lease-Purchase Agreements) Where eligible, Roam supports tax-advantaged financing structures that lower cost of capital for qualifying public agencies, allowing acquisition without voter referendums or large capital appropriations. Short-Term and Seasonal Leasing Flexible short-term lease options for campuses, districts, municipalities, and agencies experiencing seasonal demands, event needs, temporary staffing surges, or project-based requirements. Deferred and Step-Payment Options Customized payment arrangements—including deferred starts or step-up/step-down structures—to align with fiscal-year timing, grant cycles, or funding availability. EV and Green Fleet Financing Specialized structures for electric vehicles, charging infrastructure, and sustainability initiatives. These include battery-inclusive leases, charging-as-a-service models, and financing designed to align with federal or state sustainability incentives. Roam's leasing and financing programs are built to support transparent budgeting, long-term asset planning, and the unique procurement requirements of educational and governmental organizations.	*

59	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.	1 Master Services Agreement (MSA) Core contract outlining general terms, conditions, roles, responsibilities, compliance requirements, and overarching legal provisions. Vehicle Lease or Financing Agreement Defines all financial and operational terms for leased or financed vehicles, including payment schedules, lease type (operating, capital, open-end, closed-end), end-of-term options, mileage provisions, amortization, and settlement conditions. Vehicle Order Form (VOF) Specifies individual vehicle configurations, pricing, upfitting requirements, delivery instructions, and timelines. Used for each acquisition under the agreement. Maintenance & Service Level Agreement (SLA) Outlines preventative maintenance schedules, service coverage, uptime commitments, response times, exclusions, and performance guarantees. Applies to maintenance, wear-and-tear, tire, and warranty programs. Fleet Management Platform Terms of Use Establishes access rights, data ownership, privacy protections, reporting capabilities, telematics usage, system availability, and support standards for the Roam fleet portal. Upfitting Statement of Work (SOW) Details the scope, specifications, timelines, and pricing for aftermarket equipment, emergency lighting, communications gear, specialty builds, and vocational configurations. Short-Term Rental Agreement Covers short-duration vehicle rentals, including rate structure, insurance requirements, authorized drivers, and permitted use. Supports both agency and eligible employee rentals.	*
60	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?	Roam fully accepts the P-card procurement and payment process for eligible transactions, including vehicle rentals, short-term services, and certain fleet program fees. There is no additional cost to Sourcewell participating entities for using a P-card. All P-card transactions are processed at the same contracted pricing and terms provided under the awarded agreement.	*
61	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.	Included in document section	*

62	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.	1. Pricing / Cost Competitiveness 10%–15% discounts on maintenance labor, parts, tires, glass, and body shop services 5%–8% savings on preventative maintenance programs versus standard retail Up to 15% savings on wear-and-tear and collision repairs through national vendor contracts 1–2 cents per litre additional savings through Roam's fuel card program 10%–20% lower subscription fees on fleet telematics, reporting, and analytics versus stand-alone market rates 2. Value-Added Services & Operational Efficiency Up to 15% total fuel savings through Roam's driver scoring, gamification, and behavior-optimization features Scaled pricing reductions on technology bundles as fleet size increases Multi-service adoption discounts (telematics + maintenance + fuel) for integrated deployments Access to Roam's pre-negotiated national service network with tiered volume-based savings 3. Service, Support & Risk Reduction 5%–12% insurance savings achievable through improved driver underwriting supported by Roam's safety and compliance data Enhanced risk classification through telematics and behavior insights, reducing premiums for larger fleets Lower administrative costs via consolidated billing, automated approvals, and platform-driven maintenance workflows	*
63	Describe any quantity or volume discounts or rebate programs that you offer.	Vehicle Acquisition & OEM Incentives - Volume-based discount tiers and the ability to move certain services to flat-fee models once thresholds are met - Significant savings from OEM concession money tied to aggregated inventory orders (up to $15k per vehicle) Insurance & Risk Management Discounts - Reduced insurance premiums supported by Roam's driver scoring and compliance tools (Up to 15% of total policy premiums) - Underwriting support that helps fleets qualify for lower-risk categories Maintenance, Repairs & Service Discounts - Tiered pricing with up to 15% discounts on labor, parts, tires, and glass -Preferential rates on preventative maintenance and wear-and-tear programs Fuel & Operational Savings - 1–2 cents per litre in additional fuel card savings -Up to 15% fuel reduction through driver gamification and behavior optimization Technology & Platform-Based Discounts -Lower per-vehicle platform and telematics fees for larger fleets -Scaled pricing on analytics, sustainability tools, and bundled technology services	*

64	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.	Roam proposes a streamlined method for facilitating “sourced” or “open market” items through our integrated vendor marketplace. Roam maintains a network of pre-vetted local and national service providers— including garages, specialty vendors, upfitters, body shops, and parts suppliers—accessible directly through API integrations within the Roam platform. For non-contracted or open-market items, Roam will provide pricing using the following approach: **• At cost plus a transparent percentage** Roam can supply sourced items at **cost + a small, pre-defined percentage** to cover coordination and quality assurance. **• At cost for high-volume or recurring needs** Certain frequently sourced items can be provided **at cost** when volumes are consistent or when bundled with larger programs. **• Quoted individually upon request** For highly specialized, one-off, or custom requirements, Roam will supply **line-item quotes** through the platform for full transparency before work or procurement begins. **• Vendor marketplace pricing** Participating Entities can access Roam’s pre-vetted vendor marketplace directly, benefiting from: – standardized national labor rates – pre-negotiated discounts – real-time availability and scheduling – automated competitive quoting when multiple vendors are eligible This approach ensures that all sourced or non-contracted items are delivered at competitive, predictable pricing while maintaining quality and compliance across Roam’s verified vendor network.	*
65	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	The following cost elements are not included in base pricing and may apply depending on agency requirements. All pricing is **starting from** standard fleet benchmarks and varies by region and vehicle type: **• Optional training (onsite or region-specific):** Onsite starting from **$150–$350 per session**, **plus instructor travel and per diem paid by the customer** (Line items: operator training, equipment/system training, fleet portal/technology training) **• Title, licensing, and registration fees:** Starting from **$40–$180 per vehicle** (Line items: state/provincial registration, tags/plates, documentation fees) **• Custom inspection requirements:** Starting from **$75–$250 per inspection** (Line items: agency acceptance inspections, safety/compliance checks, specialized personnel) **• Aftermarket installation or custom upfitting:** Starting from **$150–$500 per installed component** (Line items: emergency lighting, communications equipment, cargo/racking systems, vocational accessories) **• Decaling and branding:** Starting from **$80–$200 per vehicle** (Line items: basic decals, door crests, reflective markings, full graphics packages)	*

66	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	Roam provides a fully managed freight and delivery program, with all delivery costs quoted at cost and without markup on each Vehicle Order Form. Typical delivery cost ranges are: Estimated Delivery Cost Ranges Standard carrier transport: $450–$950 per vehicle Enclosed/specialty carrier: $900–$1,800 per vehicle Flatbed transport (heavy-duty/vocational): $700–$1,500 Driver concierge delivery: $300–$700 per vehicle Local valet delivery (up to 150 km): $200 Valet delivery under 50 km: FREE Available Delivery Methods Free valet delivery (≤50 km): Roam provides complimentary hand-delivery by a licensed driver for nearby locations. Valet delivery (≤150 km): Flat $200 fee for extended-range local deliveries. Dealer-direct drop-off: Many partner dealers deliver vehicles directly from their location to the Participating Entity at no additional coordination cost. Open carrier transport: Standard, cost-effective option for most vehicle types. Enclosed carrier: For high-value, sensitive, or specialty vehicles. Flatbed carrier: Best for vocational, heavy-duty, or significantly upfitted units. Driver concierge: Door-to-door driven delivery for rapid deployment needs. Typical Delivery Timelines Standard units: 7–14 days after release Upfitted or vocational vehicles: 14–30 days All deliveries include full insurance coverage during transport, pre- and post-delivery condition reports, shipment tracking, and Roam-managed claims assistance.	*

67	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	Roam provides freight and delivery services to Alaska, Hawaii, Canada, and offshore locations using established multi-modal transport partners. All costs are quoted at cost with no markup and itemized on each Vehicle Order Form. Actual pricing may vary based on volume, regional availability of upfitters, local dealer proximity, and inventory location relative to the end user. Alaska Transport via West Coast ports, then barge/vessel delivery to Anchorage and other serviced ports Typical range: $1,200–$2,500 per vehicle Hawaii Carrier transport to West Coast ports followed by ocean freight to Honolulu or other islands Typical range: $1,500–$2,800 per vehicle Canada Direct carrier transport to major provinces with border and customs documentation handled by Roam Typical range: $350–$850 per vehicle Offshore / Island / Remote Locations Delivery via barge, container shipment, RORO, or mixed transport depending on destination Typical range: $1,000–$5,000+ Across all regions, Roam provides full insurance coverage, pre- and post-delivery condition reports, customs support where required, and delivery to final destination whenever feasible.	*
68	Describe any unique distribution and/or delivery methods or options offered in your proposal.	Free local valet delivery (≤50 km): Complimentary hand-delivery by a licensed driver. • Extended valet delivery (≤150 km): Low flat-rate delivery direct to agency locations. • Dealer-direct drop-off: Vehicles can be delivered straight from Roam’s dealer network without additional coordination costs. • Multi-modal fleet deployment: Seamless coordination between OEMs, upfitters, and final delivery using combined carrier, flatbed, or driver concierge transport. • Staged fleet rollout: For large orders, Roam can phase deliveries based on operational readiness, seasonal needs, or replacement cycles.	*
69	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.	- Pricing Verification: All orders and invoices are automatically checked against the contracted pricing and discount structure. Any discrepancies are flagged and corrected before billing. - Entity Eligibility Confirmation: Each transaction is validated to ensure the customer is a registered Sourcewell Participating Entity. - Order Review: Vehicle orders, leases, rentals, and maintenance enrollments are reviewed for accurate pricing, proper administrative fee application, and use of approved contract terms. - Quarterly Audits: Roam conducts quarterly internal audits of sample transactions to confirm pricing accuracy, SLA compliance, and correct administrative fee reporting. - System Safeguards: Our billing system uses built-in controls to prevent non-contract pricing from being applied to Sourcewell accounts. - Staff Training: All teams involved in quoting, billing, and customer support receive training on Sourcewell contract requirements.	*

70	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.	Contract Utilization & Growth Metrics - Number of Participating Entities actively using the agreement - year-over-year growth in contract usage and transaction volume - Total vehicle acquisitions, leases, rentals, and services processed under the agreement Service Performance & Operational Metrics - On-time vehicle delivery rate based on committed timelines - Maintenance and repair cycle times across the national network - Uptime performance of fleets enrolled in Roam maintenance programs - SLA adherence for support requests, roadside events, and issue resolution Customer Experience & Satisfaction Metrics - Participating Entity satisfaction scores and renewal rates - Response time to agency inquiries and support needs - Rate of repeat transactions per agency - Platform Engagement Metrics - Active usage of the Roam fleet management portal - Adoption of telematics, sustainability tools, and reporting features - User engagement with AI insights, driver scoring, and fleet optimization modules Cost & Value Metrics - Cost savings delivered to Participating Entities through pricing, lifecycle optimization, and right-sizing - Benchmarked performance vs. similar fleets on maintenance spend, utilization, and operating efficiency - Achievement of sustainability and electrification goals where applicable	*
71	Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The proposed 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.	Sourcewell Master Agreement. This fee will be applied to the total transaction value billed to Participating Entities during each reporting period as defined in the agreement. Given the anticipated scale and volume of transactions under this contract, Roam believes a 1% fee is both appropriate and sustainable. This structure allows us to maintain highly competitive pricing for Participating Entities while ensuring Sourcewell is fairly compensated for its contract support, program administration, and ongoing services. Keeping this fee at 1% helps preserve overall value for public-sector users while supporting the long-term success of the cooperative agreement. Roam is prepared to maintain this rate consistently across all eligible vehicle acquisitions, leases, maintenance programs, technology services, rentals, and ancillary fleet solutions conducted through the contract.	*

Table 6B: Pricing Grid: Acquisition Terms

Provide detailed pricing information in the table below.

Line Item	Type	Charged/Percentage/Fees	Details	
72	Interest Rate Index Used	Prime Rate 5.45%	Standard fleet leasing buy-rate; may vary slightly based on term length and credit conditions.	*
73	Basis Points	+150 bps to +300 bps	Applied above the index to account for lease structure, residual assumptions, and term risk. Final rate provided on every VOF.	*
74	Domestic Factory Order Vehicles	No Fee.	Includes order management, allocation, tracking, and OEM coordination. Lower fees for high-volume or standardized builds.	*
75	Foreign Factory Order Vehicles	No Fee.	Includes order management, allocation, tracking, and OEM coordination. Lower fees for high-volume or standardized builds.	*
76	Domestic Dealer Stock Vehicles	Cash: Vehicle Procurement Service, $300 flat fee Lease: No fee Finance: No Fee	Applies when sourcing from ground stock; includes dealer assignment, PDI verification, and local logistics.	*
77	Foreign Dealer Stock Vehicles	Cash: Vehicle Procurement Service, $300 flat fee Lease: No fee Finance: No Fee	Applies when sourcing from ground stock; includes dealer assignment, PDI verification, and local logistics.	*

Table 6C: Pricing Grid: Incentives

Provide detailed pricing information in the table below.

Line Item	Type	Charged/Percentage/Fees	Details	
78	Federal Tax Incentives	Passed through at 100% to Participating Entities	All eligible federal EV, hybrid, infrastructure, and commercial clean-vehicle tax incentives are applied directly to the customer. Roam does not retain any federal incentive value. United States – Federal EV & Clean Vehicle Incentives • Commercial Clean Vehicle Tax Credit (Internal Revenue Code §45W) Applies to government entities, non-profits, and commercial fleets. Incentive Amount: Up to $7,500 for light-duty EVs (< 14,000 lbs GVWR) Up to $40,000 for medium- and heavy-duty EVs (≥ 14,000 lbs GVWR) Key Benefit: Government agencies can claim this credit at point of sale even though they are tax-exempt. • Alternative Fuel Infrastructure Credit For EV charging equipment installed at fleet or agency facilities. Incentive Amount: Up to 30% of installation costs, capped at $100,000 per location. • Qualified Commercial Fuel Cell Motor Vehicle Credit Up to $40,000 for hydrogen fuel-cell commercial vehicles. • Federal Small Business EV Charging Incentives IRS allows accelerated depreciation (MACRS) for small	

			business fleets installing EV chargers. Canada – Federal Green & Zero-Emission Incentives • iZEV Program (Transport Canada) Consumer-focused but public-sector agencies may qualify depending on use-case. Incentive Amount: $5,000 for BEVs and long-range PHEVs $2,500 for short-range PHEVs • iMHZEV – Medium- and Heavy-Duty Zero-Emission Vehicle Program For fleets purchasing ZEV trucks, vans, buses, vocational vehicles. Incentive Amount: Up to $200,000 per vehicle, based on GVWR category. • Clean Technology Investment Tax Credit (Federal Budget 2023) Supports EV charging infrastructure, hydrogen production, and clean technology assets. Incentive Amount: 30% refundable investment tax credit for eligible clean tech purchases, including charging infrastructure for fleets. • Zero-Emission Vehicle Accelerated CCA (Capital Cost Allowance) Allows 100% first-year depreciation for ZEVs purchased for commercial or government use. • Canadian EV Charging Incentive (NRCan) Funding toward charging stations at workplaces and fleet yards. Up to 50% of project costs depending on program stream.	*
79	State Tax Incentives	Passed through at 100% to Participating Entities	Incentives vary by state or province (rebates, grants, sales-tax exemptions). Roam applies all state/provincial incentives directly to the customer at full value. State & Provincial EV Incentives (United States & Canada) Roam supports fleets in accessing a wide range of state and provincial EV rebates, grants, tax credits, and infrastructure incentives. Below is a highlight of the most impactful programs commonly accessed by public-sector and commercial fleets. United States – Key State EV Incentives California – HVIP (Hybrid and Zero-Emission Truck & Bus Voucher Incentive Project) $7,500–$120,000 per vehicle depending on class Applies to trucks, buses, step vans, vocational vehicles Stacks with the federal §45W Commercial Clean Vehicle Credit New York – NYSERDA Charge Ready / Truck Voucher Incentive Program (NYTVIP) Up to $185,000 per vehicle for medium/heavy-duty ZEVs Infrastructure assistance for charging equipment	

			Colorado – Clean Fleet Vehicle & Infrastructure Incentives $1,500–$8,000 per light-duty EV Up to $150,000 per heavy-duty truck Additional refundable tax credits for charging infrastructure Massachusetts – MOR-EV & MOR-EV Trucks $3,500–$7,500 per light-duty EV $7,500–$90,000 for fleet truck electrification New Jersey – NJ ZIP (Zero-Emission Incentive Program) $25,000–$100,000+ for MHD ZEV fleet purchases Bonus funding for overburdened communities Texas – TERP (Texas Emissions Reduction Plan) Voucher-style incentives for electric or alternative-fuel fleets Charging infrastructure grants also available Oregon – Oregon Clean Vehicle Rebate Program (OCVRP) Up to $7,500 for fleet EV purchases (public fleets eligible) Florida, Illinois, Minnesota, Virginia & Washington Offer a mix of: EV rebates Sales tax exemptions Fleet electrification grants Infrastructure/charger funding Canada – Key Provincial EV Incentives British Columbia – Go Electric / SUVI (Specialty-Use Vehicle Incentive) $3,000–$100,000 per vehicle depending on class Incentives for electric step vans, buses, trucks, and vocational units Charger rebates up to 50% of project cost Québec – Roulez Vert $4,000–$7,000 for light-duty fleet EVs $50,000–$150,000 per medium/heavy-duty electric vehicle Up to $5,000 for Level 2 chargers Ontario – EV Charger & Infrastructure Support (Through NRCan + IESO/Local Programs) Various charging programs; EV incentives primarily federal Stacks with federal iMHZEV and Clean Tech Tax Credit	*

			Alberta, Manitoba, Saskatchewan Incentives primarily through federal programs Some regions offer utility-backed rebates for charging infrastructure Atlantic Canada (NS, NB, PEI, NL) $2,500–$7,500 rebates for light-duty EVs Additional provincial funding for commercial-level charging depending on province	
80	Manufacturer Incentives	OEM fleet incentives, conquest cash, and volume-based concession money passed through at 100%	Roam passes all OEM incentives—including fleet cash, volume bonuses, and order-bank concession money—to Sourcewell customers. Additional negotiated discounts apply for multi-unit or standardized builds.	*

Table 6D: Pricing Grid: Maintenance & Fees

Provide detailed pricing information in the table below.

Line Item	Type	Charged/Percentage/Fees	Details	
81	Fixed Maintenance	2.5% of invoice	Applied to OEM-scheduled preventative maintenance. Covers standard PM, scheduling, coordination, and vendor management.	*
82	Occurance Maintenance	2.5% of invoice	Applies to unscheduled/general repairs billed on an as-needed basis. Covers coordination, dispatching, and invoice audit.	*
83	Management Fee	$25/month.	Covers administration, consolidated billing, vendor oversight, maintenance approvals, and customer support. Includes access to Roam's fleet management software and dedicated reporting tools.	*
84	Service Charge	2.5% of invoice	Applied when Roam coordinates specialty repairs, non-standard work, or third-party service escalation. Not charged for routine PM.	*
85	Lease Termination Fee	$600+ remaining interest on unamortized lease balance of remaining term.	Standard administrative fee applied if the vehicle is returned or terminated early. Interest based on unamortized balance and remaining term.	*
86	Interim Interest Yes/No, How is it calculated?	Yes – prorated daily from delivery date to lease start date	Calculated at the prevailing buy-rate (5.45%)+adjusted basis points on approved financials, divided by 365, multiplied by days between delivery and contract commencement.	*
87	Resale Fee	$250 flat fee	Covers remarketing, auction coordination, transport to auction, and title processing.	*
88	Provide fees not listed + rate	Varies by service	Examples: EV battery health reporting ($12–$25/yr), fuel card program ($2–$4/mo), telematics installation ($50–$125 one-time), upfit engineering ($95–$150). All passed through at cost or Sourcewell-discounted.	*

Table 6E: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments	
89	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	Here is a clean, RFP-appropriate response for **Table 6E: Pricing Offered – Comments**: **Comments:** Roam's pricing structure is designed to ensure that Sourcewell participating entities receive rates that are equal to or better than those typically available through existing cooperative contracts, state contracts, or individual agency agreements. Our national supplier relationships, volume-based purchasing, and integrated fleet services allow us to provide highly competitive pricing across vehicle acquisition, leasing, maintenance programs, technology solutions, and ancillary services. Roam is committed to transparent, consistent, and market-leading pricing that delivers measurable value to all participating entities.	*

Table 7A: Depth and Breadth of Offered Solutions (200 Points, applies to Table 7A and 7B)

Line Item	Question	Response *	
90	Provide a detailed description of all the Solutions offered, including used Solutions if applicable, offered in the proposal.	Vehicle Acquisition & Leasing -All on-road vehicle types and powertrains: light-, medium-, heavy-duty; specialty and public-safety; gas, diesel, hybrid, and electric -Flexible operating and capital leases, plus purchase financing -Full procurement management from specification and sourcing to pricing, ordering, logistics, and delivery New Vehicle Service & Preparation - Pre-delivery inspections and quality assurance - Installation of accessories, aftermarket equipment, and certified upfitting - Application of decals, branding, and required vehicle markings Maintenance & Uptime Programs - Preventative maintenance plans covering all scheduled OEM services - Wear-and-tear and cosmetic protection including scratch, dent, rim, and glass repair - Tire protection and replacement programs - Warranty management and extended coverage options - Nationwide service network supported by service level agreements Ancillary Services - Short-term rental programs for temporary, seasonal, or surge needs - Certified upfitting including lighting, communications, cargo systems, utility bodies, and specialty equipment - 24/7 roadside assistance with towing, mobile repair, and emergency EV charging - Battery health monitoring and replacement programs for EV and hybrid fleets - Support for installation, operation, and maintenance of charging and fueling infrastructure Fleet Management Technology (Roam Portal) - Real-time trade values and equity mining tools - AI-driven reporting, fleet assessments, and lifecycle cost modeling - Smart sustainability insights including emissions tracking and EV transition readiness - Integrated fuel card capabilities with real-time monitoring and spend analytics - Native driver scoring, behavior monitoring, and gamification - Utilization and optimization insights for right-sizing and performance improvement - Comparative insights and benchmarking across similar fleets and industries - Maintenance, fuel, and lifecycle spend benchmarks to identify cost-reduction opportunities	*
91	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	Vehicle Acquisition, Leasing, and Financing New Vehicle Preparation, Upfitting, and Aftermarket Services Preventative Maintenance, Fleet Repair, and Warranty Programs Wear-and-Tear, Cosmetic, and Tire Protection Services Short-Term Rental and Temporary Fleet Solutions Roadside Assistance and Emergency Support Services Electric Vehicle Battery Health and Charging Infrastructure Services Fleet Management, Telematics, and Optimization Technology Fuel Card and Fuel Management Services Driver Safety, Scoring, and Behavior Management Solutions Sustainability Insights and Emissions Reduction Planning Big Data Fleet Trends and Benchmarking Analytics Utilization Optimization and Right-Sizing Strategy Services AI-Driven Reporting, Predictive Fleet Insights, and Lifecycle Modeling	*

Table 7B: Depth and Breadth of Offered Solutions

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

Line Item	Category or Type	Offered *	Comments	
92	Services for the acquisition by Sourcewell participating entities, whether by lease or financing, of on-road vehicles of all types or classifications, all weight classes, and all engine types;	◉ Yes ○ No	Roam is fully capable of providing comprehensive vehicle acquisition services for Sourcewell participating entities. Through our nationwide OEM and dealer network, we support the procurement of all on road vehicle types, classifications, weight categories, and engine platforms, including gasoline, diesel, hybrid, and electric. Roam offers flexible operating and capital lease structures as well as purchase financing options tailored to each entity's operational and budget needs. Our team manages the entire acquisition process from vehicle specification and sourcing to order coordination, pricing, and delivery, ensuring predictable costs, reliable availability, and a streamlined procurement experience for fleets of any size.	*
93	New vehicle service and preparation for the vehicles described in 92 above, such as pre-delivery inspection, parts and accessories, installation, and vehicle marking application or installation;	◉ Yes ○ No	Roam provides full new vehicle service and preparation capabilities for all vehicles acquired through our solution. This includes comprehensive pre-delivery inspections, installation of required parts and accessories, upfitting coordination, and application or installation of any vehicle markings or branding specified by the participating entity. Roam manages these services through certified partners and OEM-approved facilities to ensure every vehicle arrives fully configured, road-ready, and compliant with agency requirements.	*

94	Preventative maintenance plans, vehicle maintenance and repair services, and related service level agreements for Sourcewell participating entity on-road vehicle fleets of all types;	◉ Yes ○ No	Roam offers a full range of preventative maintenance and repair plans that can be tailored to the needs of Sourcewell participating entities. Sample maintenance programs include options such as: * **Basic Preventative Maintenance Plan:** Covers routine services including oil and filter changes, fluid checks, tire rotations, multipoint inspections, and scheduled service intervals recommended by the manufacturer. * **Comprehensive Maintenance Plan:** Includes all preventative maintenance services plus brakes, belts, hoses, batteries, wipers, and other wear-and-tear items. This plan is designed to keep vehicles fully compliant with OEM service schedules while minimizing downtime. * **Premium Wear and Tear Protection:** Covers cosmetic and minor damage such as scratch repair, small dents, rim scuffs, cracked or chipped glass, interior repairs, and other minor incidents that would otherwise incur out-of-pocket costs. * **Tire Protection Program:** Provides full tire coverage including replacement, mounting, balancing, alignment, and repair of punctures or road-hazard damage. * **Warranty Extension and Management:** Options to extend OEM warranties and include powertrain, electrical, and major component coverage. Roam manages all warranty claims directly with manufacturers or service providers. All plans can be paired with service level agreements that guarantee response times, uptime performance, and nationwide access to certified service centers. Roam's digital platform tracks service history, automates scheduling, and provides real-time visibility into maintenance status for fleets of any size.	*

95	In addition to the solutions described in 92-94 above, proposers may include a complimentary offering of the following ancillary services: i. Short-term rental programs; ii. Upfitting or aftermarket products; iii. Fleet management information technologies, such as: telematics, fleet monitoring, fuel management, fuel tank management, and motor pool/fleet sharing software systems; iv. Roadside assistance including towing, emergency charging, and repairs; v. Vehicle battery longevity monitoring and replacement plans; including installation, operation, and maintenance of dedicated charging and fueling stations.	◉ Yes ○ No	Roam also provides a complete suite of ancillary services that complement our acquisition, preparation, and maintenance offerings. This includes short-term rental programs to support temporary fleet needs; full upfitting and aftermarket product installation through certified partners; and an industry-leading fleet management portal that delivers real-time telematics, fleet monitoring, fuel and fuel-tank management, motor-pool and fleet-sharing capabilities, and integrated service workflow management. Roam provides 24/7 roadside assistance covering towing, mobile repair, and emergency EV charging, as well as battery health monitoring and replacement programs for electric and hybrid vehicles. We also support the installation, operation, and maintenance of dedicated charging and fueling infrastructure, ensuring participating entities have a complete, end-to-end fleet management solution.	*

Table 8: Exceptions to Terms, Conditions, or Specifications Form

Line Item 96. 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 Table.xlsx - Thursday November 20, 2025 16:21:47
- Financial Strength and Stability - Curbo Inc. FS Dec. 24 - 971926.pdf - Thursday November 20, 2025 15:48:33
- Marketing Plan/Samples - square post globe and mail + fast50.pdf - Thursday November 20, 2025 16:02:24
- WMBE/MBE/SBE or Related Certificates (optional)
- Standard Transaction Document Samples - Roam_transaction docs_2025-merged.pdf - Thursday November 20, 2025 14:50:47
- Requested Exceptions (optional)
- Upload Additional Document - Roam 1 pagers.pdf - Thursday November 20, 2025 15:21:45

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. - Nicholas Coatsworth, GM, CURBO INC. O/A ROAM, 14670001 CANADA INC o/a ROAM AUTO SALES & LEASING

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_2_Fleet_Management_Leasing_RFP_112025 Fri October 24 2025 04:36 PM	☑	--
Addendum_1_Fleet_Management_Leasing_RFP_112025 Tue October 21 2025 05:07 PM	☑	2