



MASTER AGREEMENT #010626
CATEGORY: JOC or IDIQ Program Management Consulting Services
SUPPLIER: Public Consulting Group LLC

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Public Consulting Group LLC, a Delaware limited liability company located at 148 State Street, Boston, MA 02109 (PCG or 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 February 4, 2030, unless it is cancelled or extended as defined in this Agreement.
 - a) **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
 - b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #010626 to Participating Entities. In Scope solutions include:
 - a. Consulting with Participating Agencies in the development and design of a JOC or IDIQ program that aligns with the goals and objectives of the Participating Agency;
 - b. Identification and selection of the program platform or resource materials necessary to implement the Participating Agencies JOC or IDIQ program, such as technical specifications, general terms and conditions, pricing index or catalogs, reference materials, bidding methodology, procedure manuals, and contract forms;
 - c. Support for Participating Agency performance of procurement-related processes and tasks (contractor outreach and development, solicitation drafting, pre-bid conference, bid evaluation, contract award, etc.);
 - d. Technology, software, application, or platform solutions related to the offering of the solutions described in Sections 1. a. – c. above, including resources for cost proposal development, project documentation and tracking, and reporting tools; and,
 - e. Services related to the offering of the solutions described in Sections 1. a. – d. above, including training, program adoption and administration, technical and contractor support, issue tracking, management and escalation, report preparation, and customization.
- 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 Sourcwell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.
- 12) **Open Market.** Supplier's open market pricing process is included within its Proposal.
- 13) Supplier Representations:**
- i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.
 - ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.
 - iii) **Supplier Warrants.** Supplier warrants that all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.
- 14) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcwell 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 Sourcwell if this certification changes at any time during the term of this Agreement.
- 16) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to "federal" should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier's Included Solutions with United States federal funds.

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

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

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

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

- iv) **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.
- v) **CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387).** Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Agreement it will comply with applicable requirements as referenced above.
- vi) **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. § 180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.
- vii) **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).** Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).
- viii) **RECORD RETENTION REQUIREMENTS.** To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after

grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

- ix) **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.
- x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.
- xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.
- xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.
- xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.
- xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.
- xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.
- xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.

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

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

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

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

Article 2: Sourcewell and Supplier Obligations

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

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

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

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

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.
- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

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

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

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

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

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

- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.
- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.

- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.
- 18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.
- 19) **Grant of License.**
- a) **During the term of this Agreement:**
- i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.
- ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use only Supplier's pre-approved trademarks, attached hereto as Exhibit A, in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell. Sourcewell cannot edit, modify, distort, or alter any element of Supplier's trademarks or branding, nor use any Supplier trademarks in any manner that is false, inaccurate, or misleading. Finally, Supplier has the unilateral right to withdraw this right and license upon written notice to Sourcewell at any time, for any reason, and with no advance notice, in which case Sourcewell will be prohibited from using Supplier's trademarks in any advertising, promotional materials, informational site, or other marketing effort.
- 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. Sourcewell must return all marketing and promotional materials, including signage, provided by Supplier, or dispose of it according to Supplier'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.

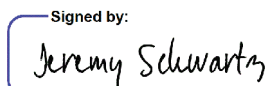
- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and

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

Public Consulting Group LLC

Signed by:

C0FD2A139D06489...

DocuSigned by:

A8A71A648BAC411...

By: _____

By: _____

Jeremy Schwartz

Mitchell Dobbins

Title: Chief Procurement Officer

Title: Practice Area Director

Date: 3/23/2026 | 4:19 PM CDT

Date: 3/23/2026 | 11:44 AM PDT

**EXHIBIT A
SUPPLIER PRE APPROVED TRADEMARK**



PUBLIC[®]
CONSULTING GROUP

RFP #010626 - JOC or IDIQ Program Management Consulting Services

Vendor Details

Company Name: Public Consulting Group LLC
6261 Hazel Avenue
Address: Orangevale, California 95662
Contact: Mitch Dobbins
Email: services@pcgus.com
Phone: 916-565-8090
Fax: 916-565-8090
HST#: 04-2942913

Submission Details

Created On: Tuesday December 02, 2025 15:30:18
Submitted On: Tuesday January 06, 2026 13:17:11
Submitted By: Mitch Dobbins
Email: services@pcgus.com
Transaction #: fd9041c5-59ea-4780-8026-8bcc7ae579c2
Submitter's IP Address: 147.243.242.145

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.	Public Consulting Group LLC
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	None
4	Provide your CAGE code or Unique Entity Identifier (SAM):	CAGE: 3EDE2
5	Provide your NAICS code applicable to Solutions proposed.	541611
6	Proposer Physical Address:	Headquarters 148 State Street, 10th Floor Boston, MA 02109
7	Proposer website address (or addresses):	www.publicconsultinggroup.com
8	Proposer’s Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the “Proposer’s Assurance of Compliance” on behalf of the Proposer):	Mitchell Dobbins Practice Area Director 148 State Street, 10th Floor Boston, MA 02109 (916) 565-8090 services@pcgus.com
9	Proposer’s primary contact for this proposal (name, title, address, email address & phone):	Gwyn Jackson Vice President 148 State Street, 10th Floor Boston, MA 02109 (916) 565-8090 services@pcgus.com
10	Proposer’s other contacts for this proposal, if any (name, title, address, email address & phone):	Nicole Alonzo Director 148 State Street, 10th Floor Boston, MA 02109 (916) 565-8090 services@pcgus.com

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

Line Item	Question	Response *
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11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	<p>Public Consulting Group LLC (PCG) was founded in 1986 to help government agencies improve operational performance and deliver better outcomes for the constituents they serve. PCG has grown from humble beginnings into a global public-sector consulting firm that remains focused on our mission of enabling effective, efficient services across the public sector.</p> <p>We are proud to offer "solutions that matter." We bring an unwavering commitment to public-sector clients and the communities they serve, guided by curiosity, evidence-based practices, and innovation. Our culture emphasizes persistence, inclusivity, passion, and entrepreneurial spirit, ensuring we deliver impactful solutions aligned to each client's mission.</p> <p>Our business philosophy centers on being a trusted, value-driven partner to public agencies nationwide. We invest in diverse, mission-aligned teams that reflect the communities we serve, believing that diversity fosters innovation and strengthens our ability to anticipate and mitigate client challenges.</p> <p>In terms of industry longevity related to the requested Solutions, our nearly 40-year history includes decades of experience in program consulting and system modernization and has proven successful across domains such as Health and Human Services, Public Safety, Labor and Workforce, Transportation, Finance, and Education. Today, PCG serves clients in all 50 states as well as Canada and Poland. We maintain roughly 1,000 open contracts at any time and employ 2,000+ professionals. The scale of our service offerings and staff enables us to mobilize expert teams and deliver consistent results for complex, multi-jurisdictional solutions.</p>
12	What are your company's expectations in the event of an award?	<p>Upon award, we will be ready to begin working closely with Sourcwell to create a shared vision of success for our future work together.</p> <ul style="list-style-type: none"> • Kickoff and Onboarding: We will work with Sourcwell proactively to initiate contract kickoff meetings as we begin to establish our working relationship. We anticipate these meetings will largely focus on contract logistics such as defining roles and responsibilities, understanding contract requirements and payment procedures for administrative fees, and reviewing PCG's marketing plan. These discussions are critical to our shared success and will set the tone for collaboration throughout our contract. • Client Outreach: Once kickoff and onboarding activities have concluded, we will begin our outreach to both current and prospective clients, leveraging our consultants as our sales force to our existing network of public sector clients in all 50 states and Canada. We will update our website and other communication channels to celebrate our new collaboration, ensuring visibility, searchability, and accessibility for any potential participating agencies. • First Engagement and Ongoing Collaboration: We know that first impressions matter, and we are dedicated to ensuring our first engagement with a participating agency will exemplify our reputation of proven experience, knowledgeable support, and service excellence. We will work closely with Sourcwell and the participating agency to establish a high degree of service quality, responsiveness, and customer satisfaction. Over the course of the contract term, we anticipate working closely with Sourcwell to ensure overall satisfaction with PCG's work, proactively addressing issues as they arise, and adapting PCG's approach to Sourcwell's and participating agencies' needs. <p>Sourcwell can expect a well-organized, collaborative, and responsive partnership with PCG. We are focused on delivering high-quality services, maintaining transparency, and ensuring satisfaction with both Sourcwell and participating agencies throughout our work together.</p>
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.	<p>PCG, a privately held company, was founded in 1986 by its current President and CEO, William S. Mosakowski. We have more than 2,000 employees in twenty offices and over 2,000 contracts throughout all fifty states.</p> <p>PCG is the primary subsidiary of its parent company, Public Consulting Group Holdings, Inc. (PCGH), which has consistently maintained a strong and stable financial position while experiencing steady growth, even in challenging economic environments. For the fiscal years ended 2025 and 2024, PCGH's Revenue exceeded \$650 million and \$647 million. In addition, PCGH has achieved double-digit growth rates nearly every year for over three decades and has continued to grow revenue in fiscal year 2026, with revenue forecast to exceed \$700 million. PCG has also remained profitable throughout its history and expects to remain profitable in the fiscal year 2026.</p> <p>In the Documents, we have uploaded a Financial Stability Letter, titled PCG LLC Financial Stability Letter 2026.</p>

14	<p>What is your US market share for the Solutions that you are proposing?</p>	<p>PCG's share of the public sector consulting market in the US is approximately 3% across all solutions offered within this proposal. Although our market share is small compared to some of our competitors, PCG specializes only in the concerns of state and local government and education institutions. We believe that this specialization gives us the advantage of deep knowledge that greatly benefits all of our clients.</p> <p>We have a well-established and robust market presence across all 50 states plus the US territories. We are already actively working with members of the Sourcewell purchasing cooperative, demonstrating an existing footprint and trusted relationships within the public sector procurement space. Our company is able to offer all services requested in the RFP and has proven experience delivering these services to a wide range of public entities, including state, local, and educational organizations, which make up 100% of our client base.</p> <p>Our consultants, who also serve as our sales force, are also distributed across the country. No matter which area of the country a Participating Agency is located, we are likely to have staff nearby and able to travel on-site if needed.</p> <p>Our deep procurement experience spans all areas of procurement, and PCG is particularly adept at aligning its services to meet the needs of smaller entities, including those without in-house procurement expertise or dedicated departments of transportation (DOT) that may utilize JOC or IDIQ procurements.</p> <p>Although our market share may be small compared to other consulting firms, our presence is large and well respected throughout the industry.</p>	*
15	<p>What is your Canadian market share for the Solutions that you are proposing?</p>	<p>PCG's market share within the public sector consulting market in Canada is less than 1% across all solutions we are offering within this proposal; however, PCG is established as an authorized entity in Canada with active contracts throughout the country. Canada is deeply embedded in the education sector, offering technology platforms and consulting services that help educators make informed decisions, improve instructional practices, and enhance student outcomes. We are recognized as a trusted leader in education technology and consulting, with a strong market presence built on data-driven solutions, strategic partnerships, and a commitment to improving outcomes for Canadian students and educational institutions.</p>	*
16	<p>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.</p>	<p>PCG LLC does not have any current or completed bankruptcy proceedings within the past seven years.</p>	*
17	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b).</p> <p>a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned?</p> <p>b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>PCG is best described as a service provider, and our sales and service force are both comprised of direct PCG employees. With over 2,000 professionals strategically located across the United States and Canada, our team brings deep expertise in state, local government, education, and health and human services as it relates to procurement. As a sales force, these consultants serve as the primary point of contact for active participating agencies who may want to work with us through this MSA. As a service force, our consultants serve as trusted advisors, guiding clients through every stage of the procurement lifecycle on procurement-related engagements.</p> <p>As it relates to our technical offering, we are the preferred system integration partner for OpenGov's GovApp Builder as a procurement platform under this MSA. Through this MSA, our consultants will serve as the sales force to initiate licensing to GovApp Builder, as well as the service force for GovApp Builder implementation.</p>	*

18	<p>If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.</p>	<p>PCG and our partner, OpenGov, maintain a comprehensive set of licenses and certifications for our technical solution, Government App Builder, to ensure compliance, security, and quality in delivering the services contemplated by this RFP.</p> <ul style="list-style-type: none"> At the organizational level, the Government App Builder platform has completed SOC 2 Type II and SOC 3 audits, demonstrating adherence to stringent controls for security, availability, and confidentiality. Government App Builder platform is accredited under the AWS Government Competency Program, confirming technical proficiency and proven success in hosting mission-critical workloads for government clients. Our security framework aligns with NIST 800-53 recommended controls, and we leverage AWS infrastructure that meets global compliance standards such as ISO, CSA, and FedRAMP. Our partner, OpenGov, undergoes annual third-party penetration testing and risk assessments, and maintains partnerships only with vendors that are SOC 2 compliant and integrate with Okta for identity management. <p>In addition to organizational certifications, our delivery team and subcontractors hold professional credentials that ensure disciplined project execution and technical excellence.</p> <ul style="list-style-type: none"> Project Management Professional (PMP), Project Management Institute (PMI) Certified Associate in Project Management (CAPM), PMI Professional Scrum Master (PSM), Scrum.org Six Sigma Green Belt, Aveta Business Institute AWS Cloud Practitioner Training Eclipse IV&V® Certification
19	<p>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.</p>	<p>PCG has not had any current or past debarments or suspensions within the past seven years.</p>
20	<p>Describe any relevant industry awards or recognition that your company has received in the past five years.</p>	<p>PCG brings a proven track record of excellence, innovation, and partnership to every engagement. Over the past five years, our company has earned national recognition for workplace culture and accessibility honors that reflect the strength of our people and processes. In 2025, PCG was named among America's Greatest Workplaces by Newsweek, and in 2024, we achieved a top score on the Disability Equality Index, affirming our commitment to inclusive practices. Additional accolades from Newsweek and the Women's Choice Award highlight our leadership in diversity and equity, while RippleMatch has twice recognized our early-career programs for best-in-class talent development. These achievements demonstrate our ability to attract and retain skilled professionals who deliver exceptional results for clients.</p> <p>Beyond workplace excellence, we have been honored for industry innovation and impact. We received the Platinum Learning Impact Award for developing the IMS CASE Registry, a 50-state digital academic standards platform showcasing our ability to execute complex, high-value projects for public entities. Our partnerships have also been celebrated through awards such as the Saf Lerman Caruso Award for advancing opportunities for children and families, and the Grossmont College Partner Award for strengthening workforce readiness. Most recently, our founder and CEO was recognized with CARE's Impact Award for Excellence in Philanthropic Leadership, underscoring PCG's commitment to creating lasting change in communities worldwide.</p> <p>These recognitions reinforce our ability to deliver the full range of services requested in this solicitation, backed by deep procurement expertise and experience across all areas of public sector procurement, with an established presence across the US and Canada. PCG offers a broad geographic footprint and a proven approach to aligning with the needs of smaller entities that may lack in-house procurement resources. Our corporate marketing team will further support outreach efforts with a comprehensive marketing plan, ensuring visibility and engagement throughout the contract term. Together, these strengths position PCG as a trusted partner for state, local, and education entities seeking a responsive, experienced, and innovative procurement solution.</p>
21	<p>What percentage of your sales are to the governmental sector in the past three years?</p>	<p>The percentage of sales in the governmental sector in the past three years is:</p> <ul style="list-style-type: none"> 2023: 100% 2024: 100% 2025: 100%

22	What percentage of your sales are to the education sector in the past three years?	<p>The percentage of sales in the education sector in the past three years is:</p> <ul style="list-style-type: none"> • 2023: 28% • 2024: 26% • 2025: 26%
23	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	<p>PCG currently holds 330 cooperative purchasing agreements with state and local government agencies across our Education, Health, Human Services, and Technology Consulting practice areas. Services through these cooperative purchasing agreements include procurement, consulting, and planning services. Most recently, we were awarded a contract under the National Association of State Procurement Officials (NASPO) Procurement Assistance and Support Services (PASS) MSA, which similarly offers procurement services to state government agencies.</p> <p>The following contracts represent a sample of our work under other cooperative agreements, annualized:</p> <ul style="list-style-type: none"> • Massachusetts Management Consultants, Program Coordinators, and Planners Services: \$2,333,333 • Missouri Office of Administration Management Consulting Services Agreement: \$1,163,883 • South Carolina Department of Health and Human Services MSA for Third Party Consulting Services: \$824,248 • Georgia DOAS Management Consulting Services Statewide Agreement: \$2,203,088 • CA City of Carlsbad MSA: \$95,755 • Virginia Information Technology Agencies (VITA) Software as a Service Implementation Services: \$807,442 • California Technology, Digital and Data Consulting (TDDC) Master Service Agreement (MSA): \$2,720,771.26
24	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	<p>Public Consulting Group LLC holds a GSA Multiple Award Schedule (MAS) Schedule. The contract number is 47QTCA20D004Y and includes the following services:</p> <ul style="list-style-type: none"> • 511210: Software Licenses • 54151S: Information Technology Professional Services • 541219: Budget and Financial Management Services • 541611: Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services • OLM: Order-Level Materials (OLM) <p>The annual volume of sales for GSA over the past three years is:</p> <ul style="list-style-type: none"> • 2024: \$3,934,277 • 2023: \$4,509,356 • 2022: \$1,395,924

Table 2B: References/Testimonials

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

Entity Name *	Contact Name *	Phone Number *
South Carolina Department of Employment and Workforce (SC DEW)	Vanessa Bartley	(803) 737-2729
North Dakota University Systems (NDUS)	Patricia Johnson	(763) 300-5216
CA City of Carlsbad MSA	Devin Castel	(442) 339-2065

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

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

Line Item	Question	Response *
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<p>26</p>	<p>Sales force.</p>	<p>PCG Sales Force and Service Capabilities: Our sales force serves as the primary communication channel with Participating Entities, ensuring consistent engagement and support throughout the lifecycle of the Sourcewell master agreement.</p> <p>We leverage our team of consulting professionals to provide business development and engagement management to our existing and potential clients. This means Sourcewell can trust that the infrastructure to leverage our existing client network for this MSA is already in place, and processes and procedures to identify new procurement clients are already established and generating business.</p> <p>Our team is strategically deployed across the United States and Canada, providing coverage to the full Sourcewell service area and leveraging deep expertise in state, local government, and education procurement processes.</p> <ul style="list-style-type: none"> • State (US), Province (CA), and Local Government: 133 • Education: 370 • Health: 338 • Human Services: 434 <p>This structure enables us to deliver tailored outreach and responsive services to thousands of agencies.</p> <p>Our sales force is already trained to educate and activate the adoption of an MSA-based cooperative purchasing model. Through direct engagement, our team will communicate the benefits of developing a new or improving an existing Job Order Contracting (JOC) and Indefinite Delivery/Indefinite Quantity (IDIQ) program, while guiding agencies through a clear, documented procurement pathway. This consultative approach ensures compliance and accelerates onboarding for Participating Entities.</p> <p>Integrated Marketing and Sales Approach: We support our sales efforts with a robust marketing strategy built around four (4) pillars:</p> <ol style="list-style-type: none"> 1. Awareness & Education 2. Sales Activation 3. Procurement Pathway Enablement 4. Digital Performance Reporting <p>Our sales team will implement this strategy to deliver a seamless, technology-driven experience. This dynamic ensures that Participating Entities receive both personalized guidance from our sales force and digital tools that simplify procurement, creating a scalable and repeatable adoption model.</p>	<p>*</p>
<p>27</p>	<p>Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.</p>	<p>We maintain a practice-wide network of nearly 1300 sales and support professionals across the United States and Canada.</p>	<p>*</p>
<p>28</p>	<p>Service force.</p>	<p>We are one of the largest firms in the nation devoted to delivering innovative, cost-effective solutions to government agencies. We are well-versed in simultaneously meeting the demands of public sector clients from across the country while maintaining our value-added approach to each project. The firm has more than 2,000 employees throughout the US with the experience and expertise to accomplish many scopes of work of varied durations and complexities at once.</p> <p>We work with our clients to understand their needs and constraints and then offer the requisite resources, tools, and processes to achieve client goals. We seek to thoroughly understand our clients' unique needs and identify staff with the necessary qualifications to deliver on our work. We will use dedicated project teams with the labor categories needed and subject matter expertise for each task order. Our project teams will work with each client team to address their specific needs, compliance requirements, and deadlines. If an external SME is required, we have many business relationships to draw from for teaming and subcontracting.</p> <p>Understanding client needs includes being able to predict and forecast staffing needs, so that preparations may be made to ensure resources are available when needed. In other words, we plan to establish a rolling roster of eligible, highly qualified staff for the most common procurement needs. To facilitate this, we consistently track and monitor each employee's allocation and utilization, and all client needs to ensure that all projects are adequately resourced. Our team will use its unique government focus and seasoned management consulting expertise to offer the full array of Procurement Assistance and Support Services within the scope of work of the Master Agreement.</p> <p>Quality assurance is prioritized throughout our processes to ensure that data is clear and accurate, and that outputs and deliverables meet and exceed expectations. Key staff will maintain regular communication with the purchasing entity throughout each project to ensure it's accomplished on time and on budget.</p>	<p>*</p>

<p>29</p>	<p>Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.</p>	<p>We provide business and technology solutions for State government agencies through a streamlined and compliant ordering process. Participating agencies can initiate purchase orders via the following methods:</p> <ul style="list-style-type: none"> • Master Service Agreement (MSA): Participating agencies may solicit responses and additional details through a Request for Offer (RFO) process. We will participate in the RFOs received, working to ensure compliant responses and detailed information. • Direct Contact: Our teams will work proactively to connect with Participating Agencies to initiate conversations and understand needs, which may result in orders issued directly under the Sourcewell MSA. • Email Submission to our Sales Force: Inquiries may be submitted to a consulting representative via email, which will be routed to our MSA contract holder to initiate the order. • Web Form Submission: Inquiries may be submitted via a webpage on our website dedicated to providing services under this MSA, which will be routed to our MSA contract holder to initiate the order. <p>We leverage Microsoft Dynamics to track leads, ensuring a systematic and organized approach to monitoring the progress of each procurement order.</p>
<p>30</p>	<p>Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.</p>	<p>We have the flexibility as a privately held company to serve our public sector clients properly with the highest level of customer service throughout all phases of the procurement lifecycle. Because nearly all of our clients are public sector agencies, we understand how to bring the brightest and best to our public sector clients, along with a success and client satisfaction rate that is unmatched in the industry.</p> <p>We will work with the participating agency procurement team to create the Project Management Plan to identify our key personnel for the project. We assign an Engagement Manager and Project Manager to every effort, who will readily advise, support, and collaborate (via phone, email, online, or on-site meetings as appropriate) with the client during standard business hours, or as contracted. Additional after-hours support or advisory services may be required or requested when major milestones approach or the state team is deeply engrossed in time-sensitive evaluations or vendor selection. Our Engagement Manager will work with the participating agency's Project Manager as needed to ensure the participating agency receives the level of support and staff with appropriate expertise to best meet the needs.</p> <p>We provide full access to our Key Personnel and core procurement team, as well as our Engagement Manager, with ready access to a pool of experienced consultants and analysts who can provide as-needed specialized skill sets to complete procurement Tasks and Deliverables. These skill sets include targeted expertise in focus areas such as project management, requirements definition, technical skills, security, data management, and organizational change management. To ensure efficient utilization and to maximize impact and value to the client when needed, these supporting resources could be pulled from our bench only as required by the needs of the engagement.</p> <p>Adaptability is a core tenet of our procurement support services delivery approach. While the above model is what we have found to be the most effective and responsive to client needs, adjustments are possible when necessary and approved by the client. Our objective is to provide our clients with the right level of customer service that results in the most favorable outcome.</p>

31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities.	<p>We are fully committed to serving Sourcewell participating entities with a comprehensive suite of products and services tailored to meet the diverse needs of public sector organizations across the United States and Canada. We fully intend to leverage this MSA as a core of our business growth strategy if awarded. Our ability to deliver is rooted in our extensive experience supporting government agencies, educational institutions, and human services organizations, as well as our robust infrastructure and dedicated workforce.</p> <p>Our nationwide team of over 2,000 professionals, including experts in state and local government, education, health, and human services, is strategically deployed to ensure responsive, high-quality service wherever our clients are located. We maintain a practice-wide network of nearly 1,300 sales and support professionals, including authorized dealers, distributors, and resellers, to provide broad coverage and specialized expertise. This integrated network enables us to deliver solutions efficiently and effectively, regardless of geography or project complexity.</p> <p>Our delivery model is enhanced through our partnership with OpenGov to offer participating entities a modern, transparent, and streamlined procurement experience, complete with centralized portals, automated compliance tools, and real-time performance analytics. This empowers agencies to access our products and services quickly, confidently, and in full alignment with Sourcewell's cooperative purchasing framework.</p> <p>Our willingness to serve Sourcewell entities is reflected in our flexible, client-centered approach. We prioritize understanding each client's unique requirements and constraints, and we adapt our resources and processes to ensure the best possible outcomes. Our teams are prepared to provide personalized guidance, ongoing support, and scalable solutions that grow with our clients' needs.</p>	*
32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	Although PCG Canada may have a smaller footprint compared to PCG US, our teams in Canada have a strong market presence in the education space and would be willing and able to engage with participating agencies under this MSA.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	We do not intend to exclude any geographic areas included in this MSA.	*
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.	Our primary focus is on public-sector consulting, particularly state and local government and education institutions. While non-profit entities are important partners to many of our public sector clients, these entities do not currently leverage our service offerings. We are open to working with non-profit entities under the Sourcewell agreement.	*
35	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	We have active engagements with public sector clients in Hawaii and Alaska and are also engaged with other US territories. There are no specific requirements or restrictions from our perspective in engaging with entities in these locations.	*
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.	<p>Public Consulting Group LLC (PCG's) marketing strategy is designed to activate adoption of contract services across a large public-sector footprint, not simply promoting the contract. We will position the Sourcewell-awarded agreement as a procurement pathway that accelerates program launch and ensures compliance, leveraging our national presence and deep relationships to reach thousands of agencies. Our approach is built on four pillars:</p> <p>Awareness & Education We will lead with education because informed clients make confident decisions. Our goal is to simplify JOC/IDIQ program management and the cooperative purchasing pathway, positioning Sourcewell as the most efficient and compliant route to implementation. We will create a sustained awareness campaign that combines thought leadership with practical guidance, ensuring agencies understand not only why this approach matters but how to act on it.</p> <p>Our outreach will begin with targeted engagement of PCG's extensive network of state, local, and education leaders, leveraging relationships built over decades of public sector consulting. These contacts will receive tailored communications that highlight the strategic advantages of cooperative purchasing: speed, cost savings, and risk reduction, compared to traditional procurement methods.</p> <p>To deepen understanding, we will host interactive webinars that go beyond surface-level explanations. These sessions will cover program design, governance structures, and step-by-step procurement processes, giving participants actionable insights they can apply</p>

immediately. Each webinar will feature real-world examples and Q&A opportunities to build trust and clarity.

We will reinforce these efforts with compelling case studies that quantify time and cost savings achieved through JOC/DIQ programs. These narratives will serve as proof points, demonstrating how agencies similar to the audience have successfully navigated the cooperative purchasing pathway and realized measurable benefits.

Finally, we will produce "How to Buy" guides that simplify the Sourcewell process into clear, visual steps. These resources will be accessible online and distributed during webinars and outreach campaigns, ensuring every stakeholder has a roadmap to move from interest to adoption without confusion or delay.

Through this multi-channel, education-first approach, we will not only raise awareness but equip agencies with the confidence and tools to act, creating momentum for widespread adoption of the Sourcewell-awarded agreement.

Sales Activation & Adoption Support

We recognize that awareness alone does not drive adoption. Activation requires a proactive, structured sales approach that embeds the Sourcewell agreement into every stage of client engagement. Our national sales force will serve as the primary communication channel with participating entities, ensuring that the cooperative purchasing pathway is positioned as the most efficient and compliant procurement method from the outset.

To achieve this, we will train all account teams on the Sourcewell process, equipping them with the knowledge and confidence to introduce the agreement early in conversations and articulate its advantages clearly. This training will include practical scenarios, compliance considerations, and step-by-step guidance so that every sales professional can act as a trusted advisor, not just a vendor.

We will integrate Sourcewell into our national account structure, making it a standard part of our engagement model. Early stage discussions will incorporate cooperative purchasing steps, reinforcing the simplicity and speed of the pathway compared to traditional procurement. To ensure localized support and responsiveness, we will designate regional leads who specialize in adoption assistance, providing hands-on guidance to agencies as they move from interest to onboarding.

To streamline implementation, we will develop onboarding toolkits and templates that standardize the process for agencies. These resources will include compliance documentation, pricing alignment, and program launch checklists, reducing administrative burden and accelerating time to value. All Sourcewell-related opportunities will be tagged in our CRM, enabling real-time visibility into pipeline health, adoption progress, and reporting metrics for Sourcewell.

This structured activation model ensures a repeatable, documented path from interest to design, contract, and program launch, creating confidence for agencies and measurable success for Sourcewell.

Procurement Pathway Enablement

We view Sourcewell as the critical procurement vehicle that allows agencies to bypass lengthy, resource-intensive solicitations and move directly to implementation with confidence. Our role is to make this pathway clear, compliant, and repeatable, ensuring that every agency can navigate the process efficiently and without uncertainty.

We will begin by embedding Sourcewell pricing and terms directly into our proposals, eliminating ambiguity and reinforcing the transparency of the cooperative purchasing model. Alongside pricing, we will provide comprehensive compliance documentation, including procurement justification language and audit-ready records, so agencies can satisfy internal and external oversight requirements without additional effort.

To further streamline the experience, we will maintain a clearly defined ordering path that shortens cycle time from initial scoping to contract execution. This path will be documented in onboarding guides and reinforced during early-stage conversations, giving stakeholders a roadmap that reduces administrative burden and accelerates decision-making.

Our government procurement platform will serve as the backbone of this enablement strategy. Through this platform, agencies can submit scope information and requirements, upload procurement documentation, and access contract-aligned pricing in a secure, centralized environment. The system also provides real-time visibility into contracting steps and timelines, ensuring transparency and accountability at every stage. Built-in audit trails and workflow tracking support compliance while reducing manual effort, allowing agencies to focus on program outcomes rather than paperwork.

By combining structured processes, embedded compliance, and technology-driven transparency, we transform the Sourcewell agreement from a contract into a fully operational procurement pathway, one that agencies can trust, replicate, and scale across their organizations.

		<p>Digital Marketing & Performance Reporting We understand that effective marketing in today’s environment requires precision, relevance, and measurable impact. Our digital strategy will ensure that the Sourcewell awarded agreement is not only visible but compelling to the right audiences at the right time. We will deploy targeted digital campaigns that leverage segmentation and analytics to reach decision makers in K–12 facilities management, higher education capital planning, city and county procurement offices, state infrastructure teams, and tribal governments. These campaigns will be designed to educate, engage, and convert interest into action by highlighting the benefits of JOC/IDIQ programs and the simplicity of the cooperative purchasing pathway.</p> <p>To maintain continuity of engagement, we will implement retargeting strategies that re-engage stakeholders who have visited our JOC/IDIQ content or interacted with our outreach but have not yet taken the next step. This approach ensures that agencies remain connected to the narrative and have multiple opportunities to act on the information provided.</p> <p>Central to this effort will be a dedicated webpage that serves as the digital hub for all Sourcewell-related resources. This page will feature a comprehensive program overview, detailed explanations of the cooperative purchasing process, “How to Buy” steps, case studies demonstrating real-world success, webinar registration links, FAQs, and a contact form for immediate engagement. By consolidating these resources in one accessible location, we will create a simple experience for agencies seeking clarity and confidence in their procurement decisions.</p> <p>Performance reporting is equally critical. We will provide quarterly reports to Sourcewell that include engagement metrics, adoption rates, pipeline progression, and cycle times from initial interest to contract execution. These reports will also capture the impact of webinars, resource downloads, and digital campaigns, offering transparency and actionable insights for continuous improvement. By combining robust digital outreach with rigorous performance tracking, we ensure that marketing efforts are not only visible but verifiably effective.</p> <p>In the Documents section, a Sample of the Marketing Plan and Tracking is uploaded, in a file named PCG Marketing Action Plan and Tracking.</p>
38	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>We leverage technology and data analytics as a cornerstone of our marketing and procurement strategy, ensuring that outreach is targeted, measurable, and transparent. Our approach combines advanced digital tools with actionable insights to optimize messaging, engage decision-makers, and streamline the procurement experience.</p> <p>We begin with CRM-based segmentation, which allows us to categorize audiences by sector, role, and readiness level. This ensures that communications are highly relevant—whether we are engaging facilities leaders, higher education capital planners, or procurement officers at state and local agencies. By tailoring content to the unique priorities of each group, we maximize engagement and accelerate adoption.</p> <p>Our marketing efforts are continuously refined through email and content analytics. These insights inform adjustments to messaging, timing, and sequencing, ensuring that stakeholders receive information that resonates and drives action. Additionally, metadata tagging enhances the discoverability of resources across search engines and within our website, making it easier for agencies to find the information they need quickly and confidently.</p> <p>Beyond outreach, our government procurement platform provides a structured, transparent procurement experience. This platform enables agencies to submit information, access contract-aligned pricing, and upload compliance documentation. Lastly, built-in audit trails reinforce accountability and reduce administrative burden.</p>

39	<p>In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?</p>	<p>Sourcewell serves as the procurement pathway partner, providing a competitively awarded vehicle and a nationally recognized access point that agencies trust. Sourcewell publishes and promotes the master agreement, enables cooperative purchasing, and offers procurement confidence through its established reputation and compliance framework. This credibility is critical for agencies seeking to accelerate implementation while maintaining transparency and governance.</p> <p>Our role is to translate that pathway into action. We do this by educating agencies on the benefits of JOC/IDIQ program management, educating agencies on the purchasing process, embedding Sourcewell terms and pricing into proposals, and guiding stakeholders through onboarding and program launch. Our approach ensures that agencies not only understand the value of the cooperative purchasing model but also have a clear, repeatable path to adopt it.</p> <p>Integration into PCG's sales process is deliberate and comprehensive. We will train all account teams on the Sourcewell pathway, equipping them to introduce it early in conversations and position it as the preferred procurement method for eligible services. Our CRM will tag Sourcewell opportunities, creating visibility into pipeline health and enabling accurate reporting.</p> <p>Standardized onboarding guides and dedicated "How to Buy" resources will be incorporated into every engagement, ensuring consistency and reducing friction for agencies.</p> <p>This alignment creates a structured adoption journey from initial interest to program design, contract execution, and launch, supported by clear milestones and accountability. By embedding Sourcewell into our national account structure and reinforcing it through training, tools, and technology, we transform the agreement from a contract into a scalable procurement solution that agencies can trust and replicate.</p>
40	<p>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.</p>	<p>We know that each engagement will be different depending on the entity's needs and context. We do not offer an online purchasing platform for this reason; each engagement is a targeted solution crafted to meet each entity's needs. We do provide two seamless options for engagement:</p> <p>First, participating entities can issue Requests for Offer (RFQs) directly to us as they normally would for consulting services. We find this is the most frequent way we receive these engagements, and they often come after we have reached out to the entity directly to generate interest. We will respond to the RFO with a detailed, tailored quote based on the scope of work listed in the RFO and negotiate with the entity from there to finalize the engagement.</p> <p>Second, we will establish a dedicated web page for entities to learn more about our offerings under the Sourcewell engagement. Interested entities can either complete a form or use a link to send an email. Our team will contact them directly and help define an engagement scope that can be used to execute a contract. We currently offer similar pages on our website, such as our suite of seven education products listed here:</p> <p>https://publicconsultinggroup.com/education/education-products/</p> <p>And this specific page about another product that demonstrates the email link:</p> <p>https://publicconsultinggroup.com/products/allocap-cost-allocation-plan-software/</p>

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

Line Item	Question	Response *
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<p>41</p>	<p>Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.</p>	<p>PCG offers a Procurement solution that is further detailed in question 42.</p> <p>Our technical solution is a managed SaaS solution, as we handle hosting, updates, security, and scaling. The necessary equipment includes standard agency IT assets, such as personal computers (PCs), laptops, secure internet access, and telecommunications setup for integration and collaboration.</p> <p>We provide a structured, tiered support model designed to ensure the timely resolution of technical issues and maintain system performance for Sourcewell participating entities.</p> <p>Our approach includes:</p> <ul style="list-style-type: none"> • Dedicated Support Channels: Agencies can submit support requests via our ticketing system. All tickets are logged into our Customer Relationship Management (CRM) system for tracking and reporting. • Tiered Support Structure: Issues are classified by severity and assigned to Tier 1, Tier 2, or Tier 3 support teams. Tier 1 and Tier 2 handle common issues and configuration needs, while Tier 3 addresses complex technical or code-related problems. • Escalation Procedures: Critical issues receive immediate attention, with acknowledgment within one hour during business hours. If resolution requires advanced troubleshooting or development, tickets are escalated to product specialists and, if necessary, the core development team for expedited fixes. • Ticket Management and Monitoring: Every ticket is timestamped, categorized, and tracked through resolution. Our project manager monitors ticket queues, provides status updates, and ensures adherence to agreed service levels. • Support Hours: Standard support is available Monday through Friday, 8:00 AM to 5:00 PM ET, excluding holidays. After-hours requests are addressed the next business day. <p>This structured approach ensures that Sourcewell members receive responsive, transparent, and professional support throughout the solution's life cycle.</p> <p>Training is central to our strategy for successful procurement programs and product implementations. We offer comprehensive knowledge transfer and training programs designed to ensure a smooth transition and continuity of operations. Our approach allows participating agency staff to ask questions and confirm that all critical processes and procedures are captured for ongoing success. Multiple training sessions are anticipated throughout system or process transition periods to facilitate effective knowledge transfer. We also provide support through observation and participation in day-to-day activities from the start of the transition until project completion. All costs associated with training are outlined in the cost workbook accompanying this response.</p> <p>Our training approach contains the following elements:</p> <ul style="list-style-type: none"> • Training Needs Assessment and Training Strategy Development: As part of every engagement, our training team conducts a needs assessment to determine the most effective training approach for the project. Factors such as the number of end-users and the diversity of their roles are considered. The resulting strategy is a collaborative effort to ensure delivery methods, materials, and timelines meet organizational needs. Training is optional and can be tailored to meet specific organizational needs. • Training Curriculum Development and Materials Review: Our training team will work to develop training based on the needs identified through the needs assessment. Our programs feature live instructor-led sessions, "train-the-trainer" workshops, hands-on exercises, and a robust library of on-demand materials. • Training Delivery and Deployment Support: All training is delivered by our experienced training team. We also offer coaching for participating agency staff in adult learning principles, as well as software training techniques to ensure internal support during and after the transition. • User Training Feedback Review: At the conclusion of our training program, we will collect and analyze participant feedback to refine future training materials and approaches.
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42	Describe any technological advances that your proposed Solutions offer.	<p>We offer a procurement solution that introduces a new era of flexibility and innovation for public sector technology. The platform is built on a low-code foundation and empowers agencies to configure, deploy, and improve applications without relying on extensive technical resources. Our solution leverages AI-driven development, seamless integration, and advanced automation to enable participating agencies to modernize operations, enhance transparency, and maintain compliance while also reducing costs and accelerating time-to-value. The following are some of the key features and benefits of the solution we offer:</p> <ul style="list-style-type: none"> • Low-Code Development and Continuous Development: Our solution allows agencies to configure and deploy applications without deep technical expertise. This flexibility enables agencies to continuously improve and adapt to workflows after implementation, without relying on costly custom development or lengthy timelines. Visual drag-and-drop tools make building and modifying applications intuitive and fast. The platform's AI-driven capabilities accelerate application creation and workflow automation. Agencies can start building apps using simple prompts, reducing development time and enabling rapid response to emerging needs. • Composable Platform and Scalability: Our solution is designed as a composable platform, allowing agencies to deploy ready-built applications from the Government App Library or create custom solutions tailored to unique requirements. This modular approach supports scalability and adaptability as the agency's needs evolve. • Seamless Integration and Interoperability: Open APIs and pre-built connectors enable interoperability with ERP, financial, GIS, document management, and identity systems. This eliminates data silos and ensures accurate, real-time information across platforms. • Advanced Workflow Automation: The platform automates multi-step approvals, notifications, and assignments, reducing manual effort and accelerating processes. Agencies can design complex workflows visually, ensuring consistency and compliance without coding. • Real-Time Reporting and Auditability: Our solution provides real-time dashboards, configurable reports, and immutable audit trails across all applications. This supports transparency, compliance with regulatory frameworks, and data-driven decision-making. • Security and Compliance: The platform meets stringent public sector security standards, including SOC 2 compliance, encryption at rest and in transit, and role-based access controls. It is designed to support frameworks such as FEMA, HUD, ARPA, and SRF. <p>Unlike traditional software solutions, our solution enables agencies to launch new applications quickly and iterate continuously. This agility ensures agencies can respond to changing regulations, community needs, and operational priorities without lengthy development cycles.</p>
43	Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.	<p>We prioritize environmental responsibility through ongoing efforts to enhance sustainability across our operations. Since 2010, our dedicated "Green Team" has championed the development and implementation of company-wide initiatives that advance our sustainability objectives. We currently occupy three LEED-certified office spaces and are actively working to improve the environmental performance of our other locations.</p> <p>Our approach to building management emphasizes eco-conscious practices, including the use of energy-efficient lighting with sensors, water-saving fixtures, and bulk purchasing to minimize waste. We are committed to selecting environmentally friendly products for both staff and cleaning services. For example, our Boston headquarters utilizes only low-VOC paints, and we work closely with property managers to install advanced air filtration systems (MERV filters) in several offices. We also collaborate with a shredding partner to ensure responsible recycling of office paper.</p> <p>Sustainable procurement is integral to our operations. We prioritize products made with post-consumer recycled materials, including paper and plastics. Approximately 70% of our office furniture is constructed from at least 30% recycled steel, 100% recycled polyester, composite plastics, and engineered wood. Additionally, 36% of our paper products and 29% of our overall office supply purchases feature eco-friendly attributes, largely through our partnership with Staples.</p>
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.	<p>We have not received third-party issued eco-labels, ratings, or certifications, as the dispersed nature of our teams allows us to lease less physical office space and use less physical material like paper to carry out the work we do. For engagements that require on-site presence, we staff locally as much as possible to decrease the environmental impact of travel.</p>
45	What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?	<p>We offer Sourcewell participating entities a uniquely comprehensive, adaptable, and technology-enabled approach to Job Order Costing (JOC) or Indefinite Delivery Indefinite Quantity (IDIQ) program management and procurement consulting. Our solutions stand out in the industry for several key reasons:</p> <ul style="list-style-type: none"> • Depth of Public Sector Experience and Customization: Our consulting team brings decades of hands-on experience working with state and local governments, education entities,

and cooperative purchasing organizations. We understand the nuanced challenges and best practices that drive successful procurement programs in the public sector, and our methodology is never one-size-fits-all. Every engagement is tailored to the specific goals, operational realities, and maturity level of each participating agency, ensuring solutions are relevant, sustainable, and future-proof.

- **Structured, End-to-End Consulting Process:** Our thorough consulting process ensures that every program is built on a foundation of thorough assessment and continuous improvement. We provide competency maturity assessments and OKR (Objectives & Key Results) frameworks, enabling agencies to measure progress and tie program success directly to strategic goals.
- **Comprehensive Resource Identification and Implementation:** Our approach includes a meticulous review and selection of all necessary program resources, such as technical specifications, contract forms, pricing catalogs, and bidding methodologies. We deliver strategic recommendations and detailed implementation plans that prioritize foundational elements and regulatory compliance while driving operational efficiency and long-term sustainability.
- **Full-Spectrum Procurement Support:** We support every phase of the procurement lifecycle, from contractor outreach and solicitation drafting to bid evaluation, contract award, and compliance validation. We offer staff augmentation, subject matter expertise, and standardized templates to strengthen agency capacity, ensure transparency, and reinforce audit readiness throughout the process.
- **Project Management Methodology and Industry Standards:** Our project management methodology (PMM), grounded in PMI and IEEE standards, ensures disciplined delivery while accommodating the unique needs of each client. Our solution complies with SOC 2, HIPAA, FERPA, GLBA, and WCAG 2.1 AA accessibility standards, providing participating agencies with a secure, inclusive, and future-ready platform.
- **Change Management, Training, and Continuous Improvement:** Our Organizational Change Management (OCM) approach, based on the Prosci methodology, guides agencies through every step of adoption, from preparing for change to reinforcing new behaviors and processes. We provide comprehensive training, multi-channel technical support, and ongoing issue management to ensure successful implementation and long-term sustainability, with regular reporting and milestone reviews reinforcing oversight, contractual compliance, and visibility.

This combination of comprehensive support and industry-specific expertise makes our offering uniquely positioned to meet the diverse needs of participating agencies.

Specific to our technical solution, we offer a comprehensive library of ready-built, configurable applications that leading agencies utilize to address critical challenges, distribute and track funds, and manage both public-facing and internal workflows.

The primary solution subcategories include:

- **Grants Management:** Track awards and manage public-facing application portals, internal reviews, and approval processes, streamlining the entire grants lifecycle from intake to fund distribution and compliance tracking.
- **Capital Budget & Project Management:** Replace ad hoc spreadsheets with structured tools for capital project intake, budgeting, approvals, and ongoing status reporting, ensuring transparency and accountability for major initiatives.
- **Constituent Relationship Management:** Log, route, and respond to resident service requests with trackable case workflows, enhancing responsiveness and public trust.
- **Spend & Approval Management:** Route approval requests, track budget availability, and build integrated reports across financial systems, supporting robust financial controls and transparency.
- **Infrastructure Fund & Loan Management:** Handle loan or incentive programs with eligibility checks, document uploads, and funding status tracking, automating complex fund management processes and ensuring compliance.
- **Disaster Preparedness & Recovery:** Rapidly deploy programs and FEMA reporting in response to emergencies, from intake to coordination, supporting agencies in managing disaster response, resource allocation, and compliance reporting.
- **311 Management:** Streamline the intake, tracking, and resolution of service requests from constituents, enhancing responsiveness and transparency.
- **Debris Management:** Coordinate and document debris removal operations, supporting disaster response and recovery efforts.

		<ul style="list-style-type: none"> • Evacuee Management: Track and manage evacuee information, shelter assignments, and resource distribution during emergencies. • Non-Fixed Asset Management: Maintain accurate records of movable assets, ensuring accountability and efficient resource utilization. • Inventory Management: Oversee inventory levels, automate reordering, and track usage across departments. • Reservation Management: Simplify the scheduling and management of public facilities, equipment, or services. <p>Our solution offers platform-wide features that drive efficiency, transparency, and adaptability:</p> <ul style="list-style-type: none"> • Workflow Automation: Low-code automation of approvals, notifications, assignments, and multi-step processes reduces manual effort, accelerates service delivery, and ensures consistency across all solution areas. • Reporting & Compliance: Real-time dashboards, configurable reports, and immutable audit trails provide instant visibility into operations, support compliance with regulatory requirements, and enable data-driven decision-making. • Integration & Data Management: Open APIs and connectors enable seamless interoperability with ERP, financial, GIS, document management, and identity systems, ensuring data consistency and eliminating silos. Our technology solutions are designed for scalability and integration, supporting agencies' evolving operational needs. • Configurable User Experience: Agencies can tailor forms, workflows, and interfaces to match their unique processes and branding, making the platform accessible and intuitive for staff and constituents alike. • Security & Access Control: Enterprise-grade security, including role-based permissions, encryption, and compliance with public sector standards, ensures that sensitive data is always protected. • Audit-Readiness: Every action, submission, and change is tracked and easily searchable, supporting internal and external audits and compliance with frameworks such as FEMA, HUD, ARPA, and SRF. • AI-Enabled Productivity: Built-in AI tools accelerate application building, automate routine tasks, and enhance data analysis, empowering agencies to do more with less. • Rapid Implementation & Support: Our proven onboarding methodology, comprehensive training resources, and dedicated support ensure agencies achieve value quickly and sustain long-term success. <p>Our solution is a foundation for digital transformation in the public sector. The platform automates manual tasks, enhances transparency, and ensures compliance, empowering agencies to deliver better outcomes for their communities. Participating agencies can be confident that with us as a partner, their processes are efficient, auditable, and future-ready.</p>
46	Describe your approach to developing, implementing, and supporting JOC or IDIQ programs for governmental or educational agencies.	<p>Our extensive experience in public sector procurement and a mature Procurement Service Line enable a unique combination of expertise, scale, and innovation for creating and supporting JOC and IDIQ programs. Our differentiators include proven multi-jurisdictional experience implementing procurement programs for state, local, tribal, and educational agencies across the U.S. and Canada; technology-driven solutions that leverage secure, cloud-based platforms for bid management, contractor performance tracking, and real-time compliance reporting; deep regulatory knowledge ensuring alignment with federal, state, and provincial procurement laws, trade agreements, and industry standards; and a commitment to equity and inclusion through targeted outreach strategies that engage small, minority-owned, and disadvantaged businesses. We provide scalable, turn-key delivery and serve as a single point of accountability, ensuring programs are sustainable, efficient, and aligned with agency objectives.</p> <p>Collaborative Discovery and Program Design: We will start with an in-depth, collaborative discovery and design phase focused on gaining a comprehensive understanding of the agency's current environment, strategic goals, operational requirements, and compliance obligations. This foundational stage establishes the framework for success by aligning program objectives with regulatory standards and organizational priorities, ensuring that every subsequent step is informed by clear insights and measurable outcomes.</p> <p>The collaborative discovery and design phase will include:</p> <ul style="list-style-type: none"> • Needs Assessment: Conducting stakeholder interviews and workshops to define program objectives, scope, technology needs, and performance metrics. • Requirements Gathering: Documenting technical specifications, regulatory requirements,

and budget parameters.

- Program Framework Development: Establishing Standards of Practice (SOP) and templates that comply with regulatory requirements and agency specifications, like Sourcewell's expectation for comprehensive solutions.
- Program Design: Developing a tailored JOC or IDIQ framework, including contract structures, pricing methodologies (line-item or percentage discount models), and performance standards.

Structured Implementation: After finalizing the program design, we lead agencies through a comprehensive implementation process that transforms strategy into action. This phase ensures full operational readiness, strict adherence to procurement laws, and seamless alignment with the established JOC or IDIQ framework. Our approach emphasizes clarity, compliance, and efficiency at every step, enabling agencies to launch programs confidently and effectively.

Our structured implementation phase will include:

- Solicitation Development: Drafting procurement documents with clear instructions, technical specifications, pricing frameworks, and evaluation criteria.
- Contractor Outreach: Executing targeted campaigns to attract qualified contractors, including small and disadvantaged businesses, supporting diversity and broad geographic coverage.
- Bid Process Management: Facilitating pre-bid conferences, managing amendments, and ensuring compliance with procurement laws.
- Evaluation Support: Implementing structured scoring systems aligned with Sourcewell's evaluation criteria (e.g., pricing, depth of solutions, marketing plan).

Ongoing Support and Continuous Improvement: Our commitment extends well beyond implementation, encompassing a sustained focus on long-term success, adaptability, and continuous improvement. Rather than concluding at program launch, we ensure each initiative evolves in response to changing regulations, emerging technologies, and shifting agency priorities. We use comprehensive tools, targeted training, and rigorous oversight to provide the structure and support necessary to maintain operational excellence and deliver measurable outcomes over time.

Ongoing support and continuous improvement activities will include:

- Training and Capacity Building: Deliver workshops and digital resources for agency staff and contractors to support program adoption and administration.
- Performance Monitoring: Provide tools and processes for tracking contractor performance, managing issues, and generating compliance reports.
- Continuous Improvement: Conduct post-award reviews and program audits to identify optimization opportunities, ensuring sustainability and scalability throughout the master agreement term.

Our approach combines strategic planning, operational expertise, and technology-driven solutions to deliver JOC and IDIQ programs that meet the highest standards of compliance and efficiency. We partner with agencies throughout the entire lifecycle from discovery, design, implementation, and ongoing support, to ensure programs are sustainable, scalable, and aligned with agency objectives.

47	Describe the JOC or IDIQ unit pricing method(s) employed by your organization and how it is developed and maintained.	<p>We employ a unit pricing methodology for JOC and IDIQ contracts that aligns with Federal Highway Administration requirements under 23 CFR Part 635, Subpart F, as a best practice. Because we serve solely public and education sector clients, we know that participating agencies may be required to align with different regulations. Our teams understand how to navigate federal, state, and local regulations to ensure that if a participating agency has requirements that differ from the Federal Highway Administration, we can tailor our approach to meet the participating agency's needs and requirements.</p> <p>We utilize a Unit Price Book (UPB) containing pre-established unit prices for defined construction tasks, which is incorporated into the solicitation and contract documents to provide transparency and consistency in pricing. To establish these prices, we will conduct market research within the local area for the client to ensure that prices as published are right-sized to what potential bidders in the participating agency market may offer.</p> <p>Contractors are able to propose one or more adjustment factors that apply to these unit prices to cover indirect costs such as overhead and profit. Each work order is competitively priced by applying the awarded adjustment factor(s) to the relevant UPB line items, ensuring further transparency and cost control.</p> <p>For option years, price adjustments are based on a published cost index rather than renegotiation, and all procedures for developing and maintaining these pricing methods are documented and submitted to the participating agency for approval. This approach ensures consistency and fairness, and complies with 23 CFR Part 635, Subpart F as a best practice.</p>
48	Describe the JOC or IDIQ program training available to participating agency staff and contractor personnel.	<p>Our training approach is designed to ensure the successful adoption and long-term sustainability of JOC and IDIQ programs for participating agencies. We deliver a comprehensive, end-to-end training experience that supports all user groups—agency staff and contractor personnel alike—through every phase of program implementation and operation.</p> <p>Key elements of our training program include:</p> <ul style="list-style-type: none"> • Role-Based Instruction: Training is tailored to the specific responsibilities of administrators, reviewers, staff, and contractors, ensuring each participant receives relevant and actionable guidance. • Delivery Formats: We offer live instructor-led sessions, “train-the-trainer” workshops, hands-on exercises, and a robust library of on-demand materials. This multi-modal approach accommodates diverse learning preferences and schedules. • Continuous Support: To reinforce learning and drive ongoing success, we provide regular office hours and refresher sessions, giving participants continuous access to expert guidance and resources. • Comprehensive Coverage: Training topics span procurement fundamentals, evaluation best practices, specification and requirements gathering, document drafting, setting SLAs and performance measures, sustaining procurement programs, and resources for cost proposal development. • Technical and Contractor Support: Our experienced team is available to address technical questions and provide contractor-specific guidance throughout the implementation and ongoing operation of the platform. <p>Our structured training and ongoing support empower agency staff and contractor personnel to confidently manage JOC and IDIQ programs, maximize program effectiveness, and ensure compliance with all relevant standards and requirements.</p>
49	Explain your method of addressing change orders within the JOC or IDIQ program.	<p>We manage change orders through a disciplined, transparent, and auditable process that protects scope integrity, controls cost and schedule, and maintains compliance with applicable procurement laws and agency policies. This approach is anchored in the program framework and templates developed during the design phase (e.g., technical specifications, general terms and conditions, pricing indexes or catalogs, procedure manuals, and contract forms), ensuring consistency, traceability, and accountability across all transactions.</p> <p>At program launch and before any change orders are processed, we conduct a comprehensive analysis of current procurement policies, procedures, and regulatory obligations to confirm alignment with applicable industry standards, laws, and regulations. This step ensures that change order protocols are compliant with safety and regulatory requirements and that any deviation from industry standards is identified and documented with equivalent function and performance justifications.</p> <p>We then embed these requirements into the agency's JOC or IDIQ framework using established templates for the agency (SOPs, contract forms, pricing references, and procedure manuals), so that approval workflows, documentation standards, and pricing methods are consistently applied to every change.</p> <p>We utilize the following structured, end-to-end change order controls:</p>

- **Early Identification and Classification:** We capture and classify change orders at the earliest point, using a standardized Change Request Form (CRF) to document triggering events (e.g., unforeseen site conditions, regulatory updates, owner-directed changes, design clarifications, safety requirements, or force-majeure impacts), location, rationale, requested schedule impact, and supporting field notes or photos. Each request is categorized (unforeseen condition, owner-initiated, regulatory compliance, value engineering) and tagged as minor, standard, or major based on predetermined thresholds for cost, schedule, and risk. The CRF and classification schema are part of the program's adopted templates and procedure manuals to maintain consistent intake and auditability.
- **Scope Validation and Alternatives Analysis:** The participating agency project lead and our team will jointly validate necessity through a root-cause review of drawings, specifications, and site reports, confirming the minimum scope required to resolve the issue. We present alternative approaches—including no-cost/low-cost options and value-engineering suggestions—with documented trade-offs for cost, schedule, quality, safety, and lifecycle impacts. A succinct decision memo records the selected approach and rationale, supporting defensible approvals consistent with the framework's governance.
- **Pricing Methodology and Cost Control:** For JOC, we price eligible line items using the contract's Unit Price Book (UPB) and apply the awarded coefficient(s), including any allowed adjustments (e.g., after-hours or remote-work factors defined in the contract). Where scope elements are not covered by the UPB, we follow the contract-defined non-priced items procedure (e.g., three quotes or substantiated cost build-up with allowable markups) to retain transparency and auditability. For IDIQ, we apply established labor, equipment, and material rate structures and validate any subcontractor quotes per contract terms. Pricing is governed by the program's accepted methodologies, line-item pricing, or percentage discounts from catalog/list pricing. This ensures that the resulting change order is consistent with the master agreement's pricing basis and not-to-exceed parameters. We perform internal reasonableness checks using historical information and benchmarks, flag variances for agency review, and verify funding availability. Where appropriate, we prepare budget adjustments or phased execution plans to maintain fiscal integrity and clarity of total acquisition cost.
- **Schedule Assessment and Impact Mitigation:** We conduct a Time Impact Analysis (TIA) to quantify critical-path effects, calculate potential delay days, and propose mitigation strategies such as resequencing, parallel activities, and procurement acceleration. Revised milestones and escalation triggers are documented and tracked against program service-level targets to preserve delivery performance.
- **Risk, Safety, and Compliance Review:** We perform a targeted risk scan covering safety, quality, permitting, environmental conditions (including hazardous materials), and stakeholder impacts. We confirm alignment with federal, state, and local procurement rules, applicable building codes, and the master agreement terms, documenting mitigation actions and compliance checkpoints within the program's SOPs.
- **Approvals Workflow and Governance:** Change orders route through tiered approval levels consistent with agency delegations of authority: minor changes receive expedited approval by the agency project manager; standard changes undergo formal review by the evaluation/oversight team and contracting officer; major changes require senior-level approval (executive sponsor or board) per policy. Transparency is reinforced through a change log and weekly dashboards that summarize status, cost, and schedule impacts, leveraging program reporting tools contemplated by the RFP.
- **Documentation and Issuance:** The change order package includes the CRF, scope narrative, pricing backup (UPB line items and coefficients or IDIQ rate details), TIA, risk and compliance checklist, reference drawings/specifications, and approval records. Upon approval, we will issue a formal change order (or task order modification) that updates contract value, schedule, and performance terms, and archives all artifacts under the project's document control plan to ensure audit readiness consistent with the framework.
- **Execution, Quality Assurance, and Closeout:** Following issuance, we provide a Notice to Proceed (NTP) for the change scope with clear sequencing and site coordination protocols. Quality controls are integrated into the QA/QC plan, inspection points and acceptance criteria are defined, and any deficiencies are tracked to resolution. Financial close confirms reconciled quantities, verified final costs, and no duplication or gaps with the base scope. Lessons learned are captured to reduce future change incidence and refine specifications and pre-construction practices.
- **Performance Metrics and Continuous Improvement:** We track key performance indicators, approval cycle time, percentage priced via UPB, variance versus estimate, schedule impact days, distribution of changes by root cause, and stakeholder satisfaction. Monthly trend reviews identify recurring patterns (e.g., design gaps), prompting actions such as specification clarifications or contractor training. Program health reporting summarizes cumulative change order exposure, contingency usage, and forecast impacts for leadership visibility, leveraging documentation and reporting tools described in the RFP.
- **Dispute Avoidance and Resolution:** To preempt disputes, we conduct pre-negotiation

huddles to align expectations and share pricing and scope rationales. If disagreement arises, we apply a fact-based negotiation protocol anchored in contract terms (UPB, coefficients, and rate schedules) and follow an escalation path of mediation or executive review, consistent with agency policy, documenting all steps.

Table 5B: Value-Added Attributes

Line Item	Question	Certification	Offered	Comment
50	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or resellers if available. Select all that apply.		<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.
51		Minority Business Enterprise (MBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.
52		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.
53		Disabled-Owned Business Enterprise (DOBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.
54		Veteran-Owned Business Enterprise (VBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.
55		Service-Disabled Veteran-Owned Business (SDVOB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.
56		Small Business Enterprise (SBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.
57		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.
58		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	No additional comment.

Table 6A: Pricing (400 Points, applies to Table 6A and 6B)

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *
59	Describe your payment terms and accepted payment methods.	PCG invoices monthly for consulting work completed, with payment due upon receipt of the invoice. Standard payment methods include ACH and check.
60	Describe any leasing or financing options available for use by educational or governmental entities.	None
61	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	We propose using our standard invoice form, which will include the agency name, contract number, and, if required, other relevant information such as the Purchase Order number. We will additionally include any information required per the contract with the purchasing entity. In the Documents under Standard Transaction Document Samples an invoice example, file named PCG Sample Customer Invoice.

62	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcwell participating entities for using this process?	We accept card transactions with a 2.9% processing fee.	*
63	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcwell discounted price) on all of the items that you want Sourcwell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	<p>We are responsible stewards of government funds, and our pricing reflects an “only pay for what you receive” mentality.</p> <p>We provide an hourly rate for resources for all consulting-based services. We only invoice for work performed for our clients, and in alignment with the final contract agreement with the purchasing entity.</p> <p>We price services for our technology solution as discreet “building blocks” so that we can establish a proposal for only the services needed to deliver the functionality requested.</p>	*
64	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	Our pricing for this MSA reflects a 5% discount for all hourly rates and solution pricing.	*
65	Describe any quantity or volume discounts or rebate programs that you offer.	None	*
66	Propose a method of facilitating “sourced” products or related services, which may be referred to as “open market” items or “non-contracted items”. For example, you may supply such items “at cost” or “at cost plus a percentage,” or you may supply a quote for each such request.	We will offer either a cost-plus percentage offer or a supplied quote for sourced products.	*
67	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	The pricing included in our proposal is reflective of all costs associated with delivering our services and solutions	*
68	If freight, delivery, or shipping is an additional cost to the Sourcwell participating entity, describe in detail the complete freight, shipping, and delivery program.	None	*
69	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	None	*
70	Describe any unique distribution and/or delivery methods or options offered in your proposal.	<p>We at PCG are committed to engaging directly with each client to ensure we fully understand their unique needs and project goals. We tailor our proposed solutions to precisely address those requirements by collaborating and communicating continuously, ensuring every recommendation is both relevant and impactful.</p> <p>Our team can deliver services in a fully remote environment, leveraging advanced technology and secure platforms to maintain productivity and connectivity. We are equally equipped to provide on-site support when in-person engagement is preferred or necessary, offering flexibility to match the needs and preferences of our clients.</p>	*

71	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing.	<p>PCG utilizes a robust internal quality audit approach that includes the following:</p> <ol style="list-style-type: none"> 1. Budgeting and Forecasting: Regularly preparing and reviewing budgets to monitor financial performance and make informed decisions. 2. Internal Controls: Establishing checks and balances, such as segregation of duties, to prevent errors and fraud. 3. Financial Reporting: Generating accurate and timely financial reports to provide transparency and accountability. 4. Auditing: Conducting internal process reviews and external audits to ensure compliance with policies and regulations. 5. Record Keeping: Maintaining detailed financial records in accordance with Generally Accepted Accounting Principles (GAAP). This includes proper documentation of all transactions, reconciliations, and financial statements. 6. Personnel Expertise: Our finance team has multiple CPA's who stay current with their continued professional education to ensure GAAP compliance and proper financial management further. <p>These procedures maintain fiscal accountability and ensure that financial records are accurate and reliable.</p>	*
72	If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.	<ol style="list-style-type: none"> 1. Marketing Efforts: Our team will establish metrics related to our marketing plan to measure the effectiveness of our electronic marketing efforts. 2. Capture Efforts: We will track outreach efforts, successful touchpoints, and each step of the sales pipeline, including those who are interested, engaged, sold, and delivered. 3. Reach: We will track the penetration level in each market, usually by state and province. 4. Sales Volume: We will track total sales volume, reportable within state/province, by participating agency type, and by service/solution sold. 	*
73	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.	We propose a 1% administrative fee, payable to Sourcewell, on all sales under this agreement. This fee will be paid by PCG and not be passed on to participating entities, and will be in addition to the 5% discount offered on our pricing.	*

Table 6B: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
74	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	No additional comments.

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

Line Item	Question	Response *
75	Provide a detailed description of all the Solutions offered, including used Solutions if applicable, offered in the proposal.	<p>PCG is offering solutions for all items in scope for this MSA as follows:</p> <p>Requested Equipment Products, or Services, Section 1.a.: Consulting with Participating Agencies in the Development and design of a JOC or IDIQ Program that aligns with the goals and objectives of the participating agency.</p> <p>Our four steps in our consultation process for developing and designing a JOC or IDIQ program are detailed below:</p>

- **Gap Analysis and Need Assessment:** We will work closely with the participating agency from the start of the engagement to understand the unique objectives and requirements of its JOC or IDIQ program. We understand that the needs of every participating agency differ, and our approach is tailored to meet clients where they are. We will begin by assessing the current state of the program through interviews and workshops with key stakeholders to identify pain points, goals, and procurement processes. This includes reviewing existing tools, templates, and training to confirm whether they support program objectives and highlight areas for improvement.
- **Impact and Effort Analysis:** We will collaborate with the participating agency to define the desired future state of the program once our team has completed our gap analysis and needs assessment. We will then perform an impact and effort analysis to determine feasibility and prioritize implementation steps, ensuring compliance with all applicable procurement regulations.
- **Strategic Recommendations and Decisions:** We will provide strategic recommendations for implementing the future state program based on the completed impact and effort analysis. These recommendations outline the sequencing of activities through a roadmap, updates or completes the development of tools and templates, and provides training for staff and key stakeholders to maximize program benefits.
- **Strategic Roadmap, Competency Maturity Assessment, and OKR Development:** We will create a roadmap for implementation, conduct a competency maturity assessment, and develop objectives and key results (OKRs) upon strategic plan approval.
 - The Competency Maturity Assessment establishes baseline maturity levels and defines what is needed to progress to the next level of maturity. This assessment is revisited regularly to track growth and identify emerging needs.
 - a. The Strategic Implementation Roadmap details the proposed sequence for implementing approved solutions, including tools, templates, and training, aligned with maturity goals.
 - b. The Objectives and Key Results (OKRs) provide measurable targets tied to strategic objectives, following the SMART framework to ensure clarity and accountability.

We will monitor advancement toward stated goals and program maturity as implementation progresses. We recognize that priorities can shift due to changes in operations or new requirements, and will work with the participating agency to adjust the roadmap as needed. This may involve revising timelines, updating tools, or adding training to keep the program on track and successful.

Requested Equipment Products, or Services, Section 1.b.: Identification and selection of the program platform or resource materials necessary to implement the Participating Agencies JOC or IDIQ program, such as technical specifications, general terms and conditions, pricing index or catalogs, reference materials, bidding methodology, procedure manuals, and contract forms.

We will take the following steps for the identification of a program platform or resource materials for implementing a JOC or IDIQ program:

- **Gap Analysis and Needs Assessment:** We will begin by conducting a thorough review of the participating agency's current procurement environment. We will utilize stakeholder interviews and collaborative workshops to uncover the participating agency's objectives, operational realities, and pain points that influence its JOC or IDIQ program. This discovery process highlights what is working, what needs improvement, and why. Our team will carefully examine technical specifications, contract terms, pricing catalogs, and procedure manuals to ensure a complete understanding of the existing system. This analysis provides a clear picture of strengths and gaps, forming the foundation for targeted enhancements.
- **Impact and Effort Analysis:** We will work with the participating agency once the current state is defined to envision a future state that is compliant, efficient, and capable of evolving with organizational growth and external changes. We will conduct a detailed impact and effort analysis for each proposed improvement, whether a new platform, updated bidding process, or revised contract template. This evaluation weighs benefits against implementation resources, identifies risks, and prioritizes actions that deliver the highest value while supporting long-term flexibility.
- **Strategic Recommendations and Program Implementation Plan:** We will develop a set of strategic recommendations tailored to the participating agency's JOC or IDIQ program needs once changes are prioritized through the impact and effort analysis. These recommendations address procurement platforms, standardized contract forms, procedure manuals, and updates to technical specifications and pricing catalogs. We sequence these actions to ensure foundational elements are implemented first, creating a strong base for advanced solutions. Each recommendation aligns with

regulatory requirements and the participating agency's strategic goals. Once decisions are finalized, we will prepare a detailed implementation plan outlining activities, timelines, and responsibilities for approval.

- **Program Implementation Execution:** We will move into execution upon approval of the program implementation plan. Competency maturity assessments will be conducted at the start and are revisited regularly to provide benchmarks and guide refinements. Change management will be integrated throughout, supported by targeted communications, training, and stakeholder engagement to drive adoption and minimize resistance. We will monitor progress closely and adjust as needed to address new requirements or unexpected challenges.

- **Continuous Improvement:** Our commitment extends beyond implementation. We will work with the participating agency before concluding the engagement to embed continuous improvement practices, ensuring the program remains sustainable and adaptable for future growth and evolving operational needs.

Requested Equipment Products, or Services, Section 1.c.: Support for Participating Agency performance of procurement-related processes and tasks (contractor outreach and development, solicitation drafting, pre-bid conference, bid evaluation, contract award, etc.);

We can support the following activities as part of the performance of procurement-related processes and tasks:

- **Contractor Outreach and Development:** We will design and execute targeted outreach strategies to build a competitive and diverse contractor pool across the widest possible geographic area. Our approach emphasizes the inclusion of small, disadvantaged, and minority-owned businesses. We increase contractor awareness and readiness for JOC/IDIQ solicitations by leveraging market intelligence and strategic communications, ensuring participating agencies have robust coverage. Outreach campaigns align with participating agency objectives and incorporate events and messaging designed to prepare vendors for participation.

- **Solicitation Drafting and Document Preparation:** We will partner with participating agency stakeholders to create clear, comprehensive procurement documents. These include instructions to proposers, technical specifications, pricing frameworks (line-item or percentage-discount models), evaluation criteria, and submission requirements. We ensure proposals are complete, compliant, and easy to evaluate. Solicitation packages integrate pricing constructs, "not-to-exceed" principles, and total-cost-of-acquisition clarity for transparency and consistency. Additionally, we will develop procedural manuals, templates, and forms such as specifications, terms and conditions, pricing indexes, and contract forms. Our approach standardizes intake, evaluation, and award processes while reinforcing audit readiness.

- **Pre-Bid Conference and Addenda Management:** We organize and facilitate pre-bid conferences to ensure prospective proposers fully understand the scope, requirements, pricing methodology, and submission protocols. We manage agendas, capture questions, and coordinate formal responses through participating agency portals, adhering to Sourcewell's guidance for webcast options and formal Q&A processes. Addenda preparation, acknowledgement tracking, and communication cadence are handled to ensure all clarifications are properly documented and issued before proposal deadlines, safeguarding fairness and compliance.

- **Bid Intake, Opening, and Evaluation:** We support portal configuration, submission acknowledgement, and intake procedures to meet solicitation requirements for timely, portal-based submissions. We implement structured scoring processes for evaluation covering financial viability, marketplace success, delivery capability, marketing plans, value-added attributes, solution depth, and pricing. Our evaluators apply calibrated rubrics, facilitate panel deliberations, and document scoring rationale for defensible award decisions. Where permitted, we coordinate interviews, demonstrations, and reference checks to validate vendor capabilities.

- **Contract Award, Negotiation, and Execution:** We assist participating agencies in finalizing awards to responsive and responsible proposers offering the best overall value. We support negotiations within solicitation and legal boundaries, document accepted exceptions, and advise on contract terms, extension options, and administrative fee expectations. Our guidance ensures stakeholders understand compliance and reporting obligations under JOC or IDIQ agreements.

- **Pricing Validation and Compliance:** We verify pricing structures against accepted models—whether line-item pricing within a Unit Price Book or percentage discounts—confirming clarity of included/excluded costs, total acquisition costs, and adherence to "not-to-exceed" parameters. This process safeguards price integrity and prevents overbilling while allowing flexibility for lower-than-ceiling pricing where appropriate.

- **Technology, Documentation, and Reporting:** We deploy technology solutions that support cost proposal development, project documentation, and reporting to streamline procurement. We configure workflows for solicitation management, Q&A/addenda, evaluation scoring, approval routing, and award documentation, providing dashboards and audit trails that reinforce compliance and transparency.
- **Training, Capacity Building, and Marketing Plan Support:** We deliver targeted training for participating agency teams and contractors on solicitation requirements, portal usage, pricing models, evaluation criteria, and post-award administration. We also assist suppliers in developing and executing marketing plans to promote awarded agreements effectively. Our approach includes supplier-led outreach and strategic communications to maximize program visibility and adoption.
- **Governance, Risk, and Protest Preparedness:** We establish governance protocols and risk controls aligned with solicitation rights and protest procedures. We document evaluation rationale, preserve records for disclosure, and advise on compliance to reduce protest risk. If protests occur, we support participating agencies in preparing timely, complete responses consistent with solicitation requirements.

Our procurement support model is grounded in compliance, transparency, and operational excellence. Decades of public sector experience with proven methodologies, standardized templates, and technology-enabled workflows enable us to deliver a structured, auditable process that empowers participating agencies to achieve successful outcomes. We ensure every step aligns with applicable laws, industry standards, and Sourcewell's solutions-based approach, regardless of whether the support involves end-to-end procurement management or targeted assistance for specific phases. Our partnership-driven model extends beyond implementation to include training, capacity building, and continuous improvement—helping participating agencies adapt to evolving regulations, optimize value, and maintain program integrity.

Requested Equipment Products, or Services, Section 1.d.: Technology, software, application, or platform solutions related to the offering of the solutions described in Sections 1. a. – c. above, including resources for cost proposal development, project documentation and tracking, and reporting tools;

Our solution is a next-generation, low-code SaaS platform designed specifically for public sector agencies. This solution empowers participating agencies to modernize procurement and contract management processes with transparency, efficiency, and compliance at every step.

Government procurement is complex; multiple solicitations, hundreds of vendors, and strict compliance requirements can overwhelm even the most experienced teams. Our solution transforms these challenges into a streamlined, digital experience, enabling participating agencies to work smarter, faster, and with confidence.

- **Contractor Outreach & Development:** Build and maintain a dynamic vendor directory with automated outreach and onboarding workflows. Targeted communications and document collection happen within the platform, reducing administrative burden and ensuring a robust, compliant vendor pool.
- **Solicitation Drafting & Management:** Create solicitations using configurable templates and clause libraries. Built-in compliance checks, automated approval routing, and version control ensure accuracy, consistency, and audit readiness.
- **Pre-Bid Conference Support:** Schedule meetings, send digital invitations, share documents, and track attendance—all within the platform. Integrated Q&A logging guarantees fairness and transparency for all vendors.
- **Bid Submission & Evaluation:** Enable secure, sealed bid submission with automated scoring and rubric-based evaluations. Compare bids side by side, track exceptions, and maintain a complete audit trail for defensible decisions.
- **Contract Award & Administration:** Streamline awards with digital approvals, e-signatures, and automated notifications. Manage contract creation, milestones, amendments, and change orders in one unified system.
- **Reporting & Auditability:** Access real-time dashboards and configurable reports for cycle times, participation rates, cost savings, and compliance metrics. Every action is logged for a complete, immutable audit trail.
- **JOC and IDIQ:** Configure and manage detailed cost catalogs and pricing sheets essential for JOC and IDIQ contracting models. Maintain standardized unit pricing, update cost data dynamically, and link pricing directly to solicitations and task orders. With our solutions' low-code flexibility, participating agencies can adapt configurations as requirements evolve—without costly custom development.

Our solution is a secure, cloud-native SaaS solution with System of Organization and Controls (SOC) 2 compliance, encryption at rest and in transit, and granular role-based access controls. Integration is seamless with robust Application Programming Interfaces (APIs) and pre-built connectors for Enterprise Resource Planning systems (ERPs), financial systems, Geographic Information Systems (GIS), document management, and identity providers. The platform supports compliance with the Federal Emergency Management Administration (FEMA), Housing and Urban Development (HUD), American Rescue Plan Act (ARPA), and Federal Simplified Review Frameworks (SRF).

Our implementation methodology ensures quick onboarding and long-term value. From discovery and configuration to data migration, testing, and go-live, we partner with participating agencies every step of the way. Comprehensive training—live, on-demand, and self-paced—empowers staff from day one. Dedicated customer success managers and technical support provide ongoing assistance, while regular platform updates deliver continuous innovation.

Our solution doesn't just provide a platform—it's a catalyst for transformation. Participating agencies gain the tools, expertise, and support through our partnership to modernize procurement, achieve compliance, and deliver measurable results.

Requested Equipment Products, or Services, Section 1.e.: Services related to the offering of the solutions described in Sections 1. a. – d. above, including training, program adoption and administration, technical and contractor support, issue tracking, management and escalation, report preparation, and customization.

- Training: We deliver comprehensive, role-specific training through live instructor-led sessions, "train-the-trainer" workshops, hands-on exercises, and on-demand resources. This approach ensures administrators, reviewers, and staff are confident from day one and supported through ongoing office hours and refresher sessions.
- Program Adoption and Administration: Our adoption strategy is grounded in Organizational Change Management (OCM) principles, following the Prosci methodology. This proven, industry-standard model organizes change into three phases:
 1. Preparing for Change
 2. Managing Change
 3. Reinforcing Change

We tailor this methodology to each project and client environment, designing a comprehensive, human-centric approach that inspires stakeholders to adopt behaviors, processes, and technologies associated with the new solution. Below is an overview of our approach and the typical deliverables associated with each step of our OCM methodology:

- Preparing for Change: We begin by assessing organizational needs, challenges, and goals. We work closely with leadership and stakeholders to define a clear change strategy, actionable plans, and success metrics aligned with project objectives.

- Managing Change: We execute targeted activities during implementation such as stakeholder engagement, communications, and training. We leverage best practices and proven tools to ensure users are informed, prepared, and supported throughout the transition.

- Reinforcing Change: We focus post-deployment efforts on sustaining adoption and driving long-term success. This includes gathering feedback, monitoring adoption of metrics, addressing resistance, and providing ongoing resources. Our approach incorporates adaptable testing strategies, role-based permissions, and in-system help documentation to align the solution with organizational policies and processes.

- Technical and Contractor Support: Support is provided through a multi-channel helpdesk (email, phone, chat) with defined SLAs, escalation paths, and proactive communication of updates.

- Issue Management: Our Maintenance and Operations team manages issue tracking and resolution through a structured process:
 - Maintaining a comprehensive log of reported issues and tracking status from identification to resolution.
 - Verifying the successful application of updates, patches, and fixes through user feedback and performance monitoring.
 - Validating that fixes resolve issues without introducing new challenges.
 - Communicating status updates and changes that may impact users.

Weekly meetings ensure prioritization of outstanding tasks and alignment with client goals and timelines, reinforcing stability and reliability during post-go-live.

- Reporting: We provide regular reporting for transparency and accountability:
- Weekly Status Updates: Progress, risks, and upcoming milestones.
- Monthly Executive Dashboards: Budget tracking, KPIs, and key decisions.
- Milestone Review Reports: Summarizing deliverable acceptance.

Each milestone is formally approved through a Deliverable Acceptance Report signed

		<p>by the Project Manager, triggering milestone-based invoicing. This structured approach ensures oversight, contractual compliance, and visibility across all project levels.</p> <ul style="list-style-type: none"> - Policy Analysis: Public sector procurements demand strict compliance with statutes, regulations, and rulemaking. Our team of seasoned experts will partner with participating agencies to identify all applicable regulatory requirements, analyze their impact on JOC and IDIQ programs, and assess existing processes for alignment. Our approach ensures that every procedure within the program meets compliance standards, reducing risk and reinforcing confidence in procurement integrity.
76	<p>Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.</p>	<p>We are proud to offer a full range of services offered within this RFP to our public sector clients. Within this response, our offerings fall into the following subcategories:</p> <p>Consulting Services:</p> <ul style="list-style-type: none"> • Procurement Program Consulting: <ul style="list-style-type: none"> - Gap Analysis and Needs Assessment - Impact and Effort Analysis - Strategic Recommendations and Program Implementation Plan - Program Implementation Execution • Procurement Support: <ul style="list-style-type: none"> - Contractor Outreach and Development - Solicitation Drafting and Document Preparation - Pre-Bid Conference and Addenda Management - Bid Intake, Opening, and Evaluation - Contract Award, Negotiation, and Execution - Pricing Validation and Compliance - Technology Documentation and Reporting - Training, Capacity Building, and Marketing Plan Support - Governance, Risk, and Protest Preparedness • Project Management: <ul style="list-style-type: none"> - Strategic Planning Support - Program Implementation Support - Technology Implementation Support • Training and Organizational Change Management: <ul style="list-style-type: none"> - Program Implementation Organizational Change Management Support - Technology Implementation Change Management Support • Technology and Implementation Support: <ul style="list-style-type: none"> - System and Services Integration Support - Testing Support - Platform Activation Support - Go-Live Support <p>Our knowledgeable team is ready to staff any size and scope of engagement for all consulting services, from large, full procurement program implementations to smaller optimization engagements for participating agencies of all sizes. The following staffing levels are available to meet the needs of each participating agency:</p> <ul style="list-style-type: none"> • Engagement Manager: This role serves as the primary point of contact for the contract. • Project Manager: This role ensures the work is completed on time, within budget, and to the highest level of quality. • Subject Matter Expert: This role guides best practices to ensure our bespoke solutions are best-in-class for each participating agency. • Senior Consultant and Consultant: These highly experienced roles are the primary executors of the tasks outlined in the engagement. • Senior Analyst and Analyst: These roles are well-versed in research and analysis methods to support deliverable development. <p>System Integration and Software Offerings:</p> <p>Our solution is designed as a modular, extensible platform that empowers participating agencies to address a broad spectrum of operational needs. The platform architecture enables rapid deployment of tailored solutions, allowing participating agencies to respond to evolving requirements and maximize their technology investment over time. The following activities are offered as part of our technology offering:</p> <ul style="list-style-type: none"> • Training • Configuration

		<ul style="list-style-type: none"> • Platform Activation • User Acceptance Testing (UAT) • Development • Import/Export Configuration • Template Configuration • Data Conversion • Go-Live and Operational Support <p>Implementation and licensing fees are also scalable to meet the needs of a participating agency's size and number of users, categorized as follows:</p> <ul style="list-style-type: none"> • Single Campus, 1 – 25 Users • Single Campus, 26 – 50 Users • Single Campus, 51+ Users • Multiple Campuses, 1 – 25 Users • Multiple Campuses, 26 – 50 Users • Multiple Campuses, 51+ Users
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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
77	Consulting with Participating Agencies in the development and design of a JOC or IDIQ program that aligns with the goals and objectives of the Participating Agency;	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>PCG has deep experience in all areas of procurement, and most of our clients are state and local governments and education entities. Our experience has given us a unique perspective on the common and not-so-common issues that government and education clients face with their procurement programs, as well as the best practices that can be implemented to successfully engage vendors and avoid pitfalls and protests. Participating agencies will create a sustainable and effective JOC or IDIQ program that will meet their needs now and into the future when working with us. The four (4) steps below outline our framework approach; they can be scaled up or down depending on the participating agency's timeline, budget, and goals, and to leverage any planning or program establishment work already completed in-house.</p> <p>The steps in our consultation process for the development and design of a JOC or IDIQ program are as follows:</p> <ul style="list-style-type: none"> • Gap Analysis and Need Assessment: We will immediately begin our engagement with a participating agency by working to understand the unique needs and objectives of their JOC or IDIQ program. While lessons learned and frameworks generally apply across levels of the public sector, we also know that each participating agency's needs are different; we will tailor our approach and solution to meet our clients where they are at. We will conduct a gap analysis and needs assessment to evaluate the current state of its program. This assessment will start with interviews and workshops with key stakeholders to discover pain points with existing approaches, manual workarounds currently in place, and goals for the

JOC or IDIQ program. We will work to understand how goods and services are currently being procured, points of success in the current process that should continue, and points of failure to be redesigned. We will also conduct an assessment of current state tools, templates, and training to validate the ability of the tools to meet the program's needs.

- Impact and Effort Analysis: We will begin working with the participating agency to document the components of their ideal future state program once the current state has been assessed. This documentation will address any gaps identified while maintaining compliance with any procurement rules the participating agency is required to adhere to. Our team may recommend additional components for consideration to support the ideal future vision based on our experience with IDIQ and JOC procurements. We will then take the proposed future state components and conduct an impact and effort analysis to determine the feasibility and implementation strategy of the ideal future.

- Strategic Recommendations and Decisions: We will make strategic recommendations on how to implement the future state JOC or IDIQ procurement program for the most benefit once the impact and effort analysis is complete. These strategic recommendations will include the update or development of tools and templates and training for staff and key stakeholders, as well as sequencing activities in the roadmap. All recommendations are presented as written reports for the participating agency to retain, and can also be delivered in presentations to leadership, oversight entities, or even prepared as slide decks for the participating agency to deliver.

- Strategic Roadmap, Competency Maturity Assessment, and OKR Development: We will develop a competency maturity assessment, a strategic implementation roadmap, and objectives and key results to ensure a successful implementation upon strategic plan approval.
 - The Competency Maturity Assessment will identify and define maturity stages in the participating agency's JOC or IDIQ program, including what will be required to achieve the next level of maturity. This assessment will be conducted at the beginning of program implementation as a baseline and will be revisited regularly to help the participating agency gauge how the maturity of the program has progressed and determine any additional needs beyond those identified in the initial future state development.
 - The Strategic Implementation

			<p>Roadmap will include the proposed sequential order for implementing future state solutions for the greatest benefit of the participating agency. Each step in the roadmap will address the tools, templates, and training as approved for the future state in order to reach the desired level of maturity outlined in the competency maturity assessment.</p> <ul style="list-style-type: none"> - The Objectives and Key Results (OKRs) for JOC or IDIQ program implementation will help the participating agency define and measure the success of the program and explicitly tie program success to overarching strategic goals. These OKRs will follow the SMART goals framework (specific, measurable, achievable, relevant, and timely) to ensure shared understanding of the goals and ability to mark progress toward successful completion. <p>Our approach will help to assess progress toward the participating agency's stated goals and the maturity of their IDIQ/JOC program as the future state is implemented. Change is inevitable, and with the ever-changing nature of government and education operations, there may be times when a future state ideal is no longer feasible, or new program requirements are discovered that fundamentally change the course of the strategic plan. We will work with the participating agency regularly and as needed to evaluate the progress of the strategic plan and program maturity and help to determine what changes are needed to keep the program moving forward. Changes might include additional training, further updates to tools and templates, or re-prioritizing the strategic roadmap to implement specific future state components sooner. Whatever the change may be, we are experienced and well prepared to help navigate the change with the participating agency to make the program as successful as possible.</p>
78	<p>Identification and selection of the program platform or resource materials necessary to implement the Participating Agencies JOC or IDIQ program, such as technical specifications, general terms and conditions, pricing index or catalogs, reference materials, bidding methodology, procedure manuals, and contract forms;</p>	<p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>	<p>Building a procurement program requires a thorough assessment of needs and business constraints. We can help participating agencies fully assess their current state and create an ideal future state through our consultation process that is sustainable for the participating agency well after our engagement has ended.</p> <ul style="list-style-type: none"> • Gap Analysis and Needs Assessment: The first step in our approach begins with a deep dive into the current state of the participating agency's procurement environment. We will engage stakeholders through interviews and workshops to uncover the unique objectives, operational realities, and pain points that shape their current JOC or IDIQ programs. This collaborative discovery process will

help to identify what works, what doesn't, and why. We will meticulously review existing technical specifications, contract terms, pricing catalogs, and procedure manuals, ensuring that every nuance of the participating agency's procurement process is well understood. We can build a comprehensive picture through this lens of both the strengths and gaps in the current system, setting the stage for targeted improvements.

- Impact and Effort Analysis: We will begin to envision a future state for the procurement program that is compliant, efficient, and sustainable once we have a clear understanding of the current state. We will conduct a rigorous impact and effort analysis of each proposed enhancement, whether it's a new platform, updated bidding methodology, or revised contract template, to weigh the benefits of each change against the resources required to implement it, identify potential risks, and prioritize actions that will deliver the greatest value.

- Strategic Recommendations and Program Implementation Plan: We will draft a list of recommendations based on the prioritized list of changes from the impact and effort analysis for the participating agency to consider for implementing in their JOC or IDIQ Program. These recommendations will encompass all JOC or IDIQ Program needs, including the most suitable platforms for procurement management, standardized contract forms and procedure manuals, and proposed updates to technical specifications and pricing catalogs. We will sequence these recommendations to ensure that foundational elements are addressed first, laying out the groundwork for more advanced solutions. Each recommendation will be created to meet regulatory requirements while achieving the participating agency's goals for the program. We will create a detailed program implementation plan based on accepted recommendations to include activities, timelines, and responsibilities for participating agency approval.

- Program Implementation Execution: We will begin work on plan execution upon program implementation plan approval. Competency maturity assessments will be conducted at the outset and revisited regularly, providing participating agencies with clear benchmarks for progress and opportunities for refinement. Change management is woven throughout the process, with targeted communications, training, and support designed to drive adoption and minimize resistance. We will monitor implementation progress closely and

			<p>will make adjustments as needed in response to new requirements or unforeseen challenges.</p> <ul style="list-style-type: none"> • Continuous Improvement: We are committed to ensuring that the JOC or IDIQ program is not only successfully implemented but also positioned for long-term growth and adaptation. We will work with participating agencies before our engagement comes to an end on continuous improvement methodologies and principles to help them ensure the new program is sustainable well into the future.
79	<p>Support for Participating Agency performance of procurement-related processes and tasks (contractor outreach and development, solicitation drafting, pre-bid conference, bid evaluation, contract award, etc.);</p>	<p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>	<p>Our proven experience in public sector procurement allows us to offer a comprehensive suite of services designed to meet the unique needs of Sourcwell participating agencies. We deliver tailored solutions that ensure compliance, efficiency, and transparency throughout every stage of the procurement lifecycle, whether participating agencies require full, end-to-end procurement support or targeted assistance with specific procurement phases. Our team also provides staff augmentation and subject matter expertise to strengthen participating agency capacity where needed, enabling participating agencies to manage complex procurement tasks confidently and effectively. We draw on deep experience navigating the intricacies of government procurement and cooperative purchasing environments to ensure that all processes align with applicable laws and industry standards. Below is an overview of the services we provide to support participating agency performance of procurement-related processes and tasks.</p> <ul style="list-style-type: none"> • Contractor Outreach and Development: We design and execute targeted contractor outreach that builds a competitive, diverse vendor pool across the largest possible geographic area, supporting access for small, disadvantaged, and minority-owned businesses and ensuring adequate coverage for participating agencies. Outreach campaigns are coordinated with participating agency goals and leverage our market intelligence, communications, and events strategy to increase contractor awareness and readiness for JOC/IDIQ solicitations. • Solicitation Drafting and Document Preparation: We collaborate with participating agency stakeholders to draft clear, comprehensive procurement documents, including instructions to proposers, technical specifications, pricing frameworks (line-item or percentage-discount models), evaluation criteria, and submission requirements. Our support will ensure proposals are complete, compliant,

and easy to evaluate. We will integrate the solicitation's pricing constructs, "not-to-exceed" principles, and total-cost-of-acquisition clarity into the solicitation package so pricing is transparent and consistent with master agreement expectations. We also prepare procedural manuals, templates, and forms that become part of the participating agency's established framework (e.g., specifications, terms and conditions, pricing indexes/catalogs, reference materials, manuals, and contract forms), thereby standardizing intake, evaluation, and award processes while strengthening audit readiness.

- Pre-Bid Conference and Addenda Management: We plan and facilitate pre-bid (pre-proposal) conferences to ensure prospective proposers understand the scope, requirements, pricing methodology, and submission protocol. We coordinate agendas, capture questions, and support formal responses through the participating agency's portal processes, aligning with Sourcewell's guidance on optional webcast conferences and the requirement that all questions be submitted and addressed via formal channels and addenda. We manage addenda preparation, acknowledgement tracking, and communication cadence so that any clarifications or modifications are formally issued and properly recorded before the proposal due date, protecting fairness and compliance.

- Bid Intake, Opening, and Evaluation: We support participating agencies in setting up portal configuration, submission acknowledgement, and intake procedures, consistent with the solicitation's requirements for timely, portal-based submissions and confirmation protocols. We implement a structured scoring process for evaluation, including criteria for financial viability and marketplace success, ability to sell and deliver solutions, marketing plan, value-added attributes, depth and breadth of solutions, and pricing. Our evaluators apply calibrated scoring rubrics, facilitate panel deliberations, and document the basis for scores to support defensible award decisions. We coordinate interviews, demonstrations, and reference checks where permitted to validate capability and fit.

- Contract Award, Negotiation, and Execution: We also assist participating agencies in finalizing awards to responsive and responsible proposers whose offers present the best overall value relative to commonly requested specifications, geographic coverage, and service networks. We support negotiations

within the boundaries of the solicitation and State legal requirements, and assist in documenting accepted exceptions noted at submission. We can also guide participating agencies on the contract's term, extension options, and administrative fee expectations, ensuring stakeholders understand downstream compliance and reporting obligations under the JOC or IDIQ.

- Pricing Validation and Compliance: We validate pricing structures against the solicitation's accepted models, line-item pricing within a Unit Price Book, and percentage discounts or price adjustments, confirming clarity of included/excluded costs, total cost of acquisition, multi-currency requirements (US/CAD, as applicable), and adherence to "not-to-exceed" parameters. This safeguards price integrity and prevents billing above agreed ceilings while permitting lower-than-ceiling sales where appropriate.

- Technology, Documentation, and Reporting: We can deploy technology, software, and platform solutions to streamline procurement tasks that support cost proposal development, project documentation and tracking, and reporting tools. We can configure workflows for solicitation management, Q&A/addenda, evaluation scoring, approval routing, and award documentation, providing dashboards and audit trails that reinforce compliance and transparency throughout the process.

- Training, Capacity Building, and Marketing Plan Support: We deliver targeted training for participating agency teams and contractors on solicitation requirements, portal usage, pricing models, evaluation criteria, and post-award administration, supporting program adoption and administration. We also assist in shaping and executing the supplier's Marketing Plan to ensure that awarded agreements are effectively promoted and accessible to participating agencies, consistent with the solicitation's expectations for supplier-led communication and service coverage.

- Governance, Risk, and Protest Preparedness: We establish governance protocols and risk controls that align with the solicitation's reserved and protest procedures, documenting evaluation rationale, preserving records for public disclosure after negotiations, and advising on procedural compliance to reduce protest risk. When protests occur, we support participating agencies in assembling complete, timely responses consistent with solicitation requirements.

			<p>Our procurement support model is built on a foundation of compliance, transparency, and operational excellence. We combine decades of public sector experience with proven methodologies, standardized templates, and technology-enabled workflows to deliver a structured and auditable process that empowers participating agencies to achieve successful outcomes. We ensure every step aligns with applicable laws, industry standards, and Sourcewell's solutions-based approach, whether providing end-to-end procurement management or targeted assistance for specific phases. Our commitment extends beyond implementation to include training, capacity building, and continuous improvement, helping participating agencies adapt to evolving regulations, optimize value, and maintain program integrity. Our partnership-driven approach allows us to serve as a trusted advisor and implementation partner, delivering measurable results and advancing the goals of cooperative purchasing.</p>
80	<p>Technology, software, application, or platform solutions related to the offering of the solutions described in 77-79 above, including resources for cost proposal development, project documentation and tracking, and reporting tools; and,</p>	<p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>	<p>Our procurement solution is a comprehensive, cloud-based solution purpose-built to support every stage of the public sector procurement lifecycle. The platform combines robust workflow automation, advanced documentation and tracking, and powerful reporting tools to ensure transparency, compliance, and efficiency.</p> <p>The Procurement application delivers these capabilities through a set of integrated features designed to address the most critical needs of public sector procurement teams:</p> <ul style="list-style-type: none"> • Cost Proposal Development: The application provides configurable templates for solicitation and cost proposal creation, supporting standardized pricing structures, line-item breakdowns, and automated compliance checks. Built-in collaboration tools enable internal teams and external vendors to submit, review, and revise proposals securely. Integrated approval workflows ensure that all cost proposals are reviewed and authorized according to participating agency policy. • Project Documentation and Tracking: All procurement-related documents, including solicitations, bids, contracts, amendments, and communications, are stored in a centralized, searchable repository. The platform tracks every action and change, maintaining a complete audit trail for each project. Agencies can monitor project milestones, deadlines, and deliverables in real time, with automated notifications and reminders to keep processes on track. • Reporting Tools: The

			<p>Procurement application features real-time dashboards and configurable reports that provide visibility into key performance indicators such as cycle times, vendor participation, cost savings, and compliance metrics. Participating agencies can generate standard or custom reports for internal management, external audits, or regulatory compliance. All data is exportable for further analysis or integration with other systems.</p> <p>Additional Platform Strengths Include:</p> <ul style="list-style-type: none"> • Workflow Automation: The application automates multi-step approvals, notifications, and assignments to reduce manual effort and accelerate procurement processes. • Integration: Open APIs and connectors enable seamless interoperability with ERP, financial, and document management systems, ensuring data consistency and eliminating silos. • Security and Compliance: Enterprise-grade security, role-based access controls, and compliance with public sector standards protect sensitive procurement data. • Intuitive User Experience: A configurable, intuitive interface allows participating agencies to tailor workflows and forms to their unique requirements, supporting both staff and vendor engagement. <p>Our solution delivers a unified, end-to-end solution for cost proposal development, project documentation and tracking, and reporting. This empowers participating agencies to manage procurement with confidence, transparency, and efficiency.</p>
81	<p>Services related to the offering of the solutions described in Sections 77-79 above, including training, program adoption and administration, technical and contractor support, issue tracking, management and escalation, report preparation, and customization.</p>	<p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>	<p>Our approach includes a full suite of services to ensure the successful adoption and long-term sustainability of the solution. We bring a comprehensive, end-to-end approach to platform implementation. Our key responsibilities encompass vendor oversight, organizational change management (OCM) and communications, onsite and virtual training for all user groups, technical and contractor support, and issue management for the implementation and ongoing operation of the platform. The activities associated with our work are guided by our Centers of Excellence and implemented by our expert team. These activities include:</p> <ul style="list-style-type: none"> • Training: We provide comprehensive training programs that are role-based and delivered through live instructor-led sessions, "train-the-trainer" workshops, hands-on exercises, and on-demand materials. This ensures administrators, reviewers, and staff are confident

from day one and supported through ongoing office hours and refresher sessions.

- Program Adoption and Administration: Our program adoption and administration activities are supported by our Organizational Change Management (OCM) approach. Our Prosci Methodology-driven approach follows a proven, industry-standard model that organizes change into a three-step process, with each step building on the previous. We tailor this methodology to each project and client environment, designing a comprehensive, human-centric approach that inspires stakeholders to adopt behaviors, processes, and technologies associated with the new solution. Below is an overview of our approach and the typical deliverables associated with each step of our OCM methodology:

- Preparing for Change: We begin by identifying the organization's specific needs, challenges, and goals. Our team collaborates closely with leadership and key stakeholders to define a clear change strategy, actionable plans, and success metrics that align with the project's vision and objectives.

- Managing Change: We execute targeted change management activities during implementation, including stakeholder engagement, communications, and training. We leverage industry best practices, proven tools, and templates to ensure all users are informed, prepared, and supported throughout the transition.

- Reinforcing Change: We focus on sustaining adoption after deployment to drive long-term success. This includes gathering feedback, monitoring adoption metrics, addressing resistance, and providing ongoing support and resources to ensure the new solution delivers its intended value. Our approach is implemented through adaptable testing strategies, role-based permissions, and in-system help documentation, enabling our clients to align the system with their policies and operational processes.

- Technical and Contractor Support: Support is delivered via a multi-channel helpdesk (email, phone, chat) with defined SLAs, escalation paths, and proactive communication of updates.

- Issue Management: Issue tracking and management are managed by our Maintenance and Operations team. Our approach includes:

- Maintaining a comprehensive log of all reported issues and tracking their status from identification through resolution.

- Verifying that system updates,

		<p>patches, and bug fixes are applied successfully by gathering user feedback and monitoring platform performance.</p> <ul style="list-style-type: none">- Validating that fixes resolve the reported issues without introducing new challenges or affecting other areas of the solution.- Providing clear communication to stakeholders about the status of issues, updates, and any changes that may impact users. <p>We focus on the tracking and validation of system updates and bug fixes to help ensure the platform becomes increasingly stable and reliable during the post-go-live phase. Weekly meetings enable our team to clarify and prioritize outstanding tasks, ensuring that the work being performed aligns with the client's goals and sense of urgency.</p> <ul style="list-style-type: none">• Reporting: Regular reporting will be provided to ensure transparency and accountability, including weekly status updates on progress, risks, and upcoming milestones; monthly executive dashboards that track budget, KPIs, and key decisions; and milestone review reports that summarize deliverable acceptance. Each milestone will be formally approved through a Deliverable Acceptance Report, signed by the Project Manager, which documents the conditions for acceptance and triggers milestone-based invoicing. This structured approach reinforces oversight, contractual compliance, and consistent visibility across all levels of the project.• Policy Analysis: We know from our experience that conducting public sector procurements requires adherence to statute, regulation, and rulemaking. Our team of qualified experts can help participating agencies identify applicable regulations, analyze how they apply to the JOG and IDIQ program, and evaluate processes and procedures within the program for compliance.
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Exceptions to Terms, Conditions, or Specifications Form

Only those Proposer Exceptions to Terms, Conditions, or Specifications that have been accepted by Sourcewell have been incorporated into the contract text.

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](#) - PCG Sourcewell Cost Proposal.pdf - Tuesday January 06, 2026 12:29:27
 - [Financial Strength and Stability](#) - PCG LLC Financial Stability Letter 2026.pdf - Tuesday January 06, 2026 12:29:39
 - [Marketing Plan/Samples](#) - PCG Marketing Action Plan and Tracking.pdf - Tuesday January 06, 2026 12:29:52
 - WMBE/MBE/SBE or Related Certificates (optional)
 - [Standard Transaction Document Samples](#) - PCG Sample Customer Invoice.pdf - Tuesday January 06, 2026 13:09:06
 - [Requested Exceptions](#) - PCG Red-Lined - Master_Agreement_010625_JOC_IDIQ_Program_Management_Consulting.docx - Tuesday January 06, 2026 12:30:58
 - Upload Additional Document (optional)

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT OF COMPLIANCE

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

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for award.
3. The Proposer certifies that:
 - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
 - (i) Those prices;
 - (ii) The intention to submit an offer; or
 - (iii) The methods or factors used to calculate the prices offered.
 - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
 - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. Proposer its employees, agents, and subcontractors are not:
 1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
 2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
 3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - Mitchell Dobbins, Practice Area Director, Public Consulting Group LLC

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

Yes No

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

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

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum 8 JOC or IDIQ Program Management Consulting Services 010626 Wed December 24 2025 04:00 PM	<input checked="" type="checkbox"/>	2
Addendum 7 JOC or IDIQ Program Management Consulting Services 010626 Tue December 23 2025 01:21 PM	<input checked="" type="checkbox"/>	1
Addendum 6 JOC or IDIQ Program Management Consulting Services 010626 Mon December 22 2025 10:44 AM	<input checked="" type="checkbox"/>	5
Addendum 5 JOC or IDIQ Program Management Consulting Services 010626 Wed December 17 2025 07:26 AM	<input checked="" type="checkbox"/>	1
Addendum 4 JOC or IDIQ Program Management Consulting Services RFP 010626 Mon December 15 2025 10:48 AM	<input checked="" type="checkbox"/>	2
Addendum 3 JOC or IDIQ Program Management Consulting Services 010626 Mon December 8 2025 08:04 AM	<input checked="" type="checkbox"/>	1
Addendum 2 JOC or IDIQ Program Management Consulting Services 010626 Wed December 3 2025 08:33 AM	<input checked="" type="checkbox"/>	1
Addendum_1_JOC_or_IDIQ_Program_Management_Consulting_Services Wed November 26 2025 02:53 PM	<input checked="" type="checkbox"/>	-