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MASTER AGREEMENT #061726
CATEGORY: Enterprise Artificial Intelligence: Platforms, Services, and Integrated Delivery
SUPPLIER: IT Automation LLC

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, Staples, MN 56479 (Sourcewell) and IT Automation LLC, 1155 Kildaire Farm Road, Suite 102, Cary, NC 27511 (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 I:
General Terms

The General Terms in this Article I 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 II), and between Supplier and Participating Entity (Article III), respectively. These Article I 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.

A. **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.

B. **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.

C. **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 and respective funding source restrictions. Sourcewell makes no representations or warranties, express or implied, regarding a Participating Entity's compliance with the laws of its jurisdiction or any other restrictions tied to its funding sources in connection with accessing Sourcewell's Cooperative Purchasing Program Master Agreements.

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D. **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.

E. **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is ten (10) years from the effective date with no extensions. The Agreement expires at 11:59 P.M. Central Time on November 11, 2036, unless it is cancelled or extended as defined in this Agreement.

1. **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions beyond the ten-year term as required under exceptional circumstances and mutual agreement.

F. **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.

G. **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #061726 ("RFP") to Participating Entities. In Scope solutions include:

Lot 1: AI products and platforms, including but not limited to:
- AI platforms and infrastructure
- Intelligent automation platforms and agentic AI

Lot 2: AI Professional Services, including but not limited to:
- AI Strategy, governance, and enterprise transformation
- AI-enabled managed services
- AI software development and engineering

Lot 3: Integrated AI Delivery

H. **Included Solutions.** Supplier's Proposal to Lot 1 of 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.

I. **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.

J. **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.

K. **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcewell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.

L. **Open Market.** Supplier's open market pricing process is included within its Proposal.

M. **Supplier Representations:**

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1. **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.

2. **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.

3. **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.

N. **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the term of this Agreement.

O. **Debarment and Suspension.** Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time during the term of this Agreement.

P. **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).**

1. Sourcewell issued the RFP for an indefinite quantity cooperative purchasing master agreement which is available for use by eligible public agency Participating Entities. Sourcewell did not issue the RFP or award any master agreement under a federal award. Participating Entities are responsible for ensuring awareness, implementation, and compliance with all applicable federal procurement standards or requirements.

2. Participating Entities that are Recipients or Subrecipients of 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. The terms and conditions of Attachment 1 apply when a Participating Entity accesses Supplier's Included Solutions using FEMA funding sources and to other federal funding sources, as applicable. Participating Entities may have additional requirements based on specific funding source terms or conditions. Participating Entities will be responsible for notifying suppliers of any applicable requirements and compliance obligations (including any applicable domestic preference requirements) in resulting transaction documents.

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- All references to "recipient," "non-federal entity," or "subrecipient" should be interpreted to mean the Participating Entity accessing Included Solutions under this Agreement;
- All references to "supplier" or "contractor" should be interpreted to mean the Supplier;
- All references to "subcontractor" should be interpreted to mean subcontractors of Supplier offering the Included Solutions;
- None of the references should be interpreted as reference to Sourcewell; and
- None of the terms or conditions within this Section should be interpreted to obligate Sourcewell in any way.

Sourcewell makes no representations or warranties, express or implied, regarding a Participating Entity's compliance with the laws of its jurisdiction or any other restrictions tied to its funding sources in connection with accessing this Master Agreement.

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.

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

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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.

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.

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.

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.

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).

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

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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.

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.

BUY AMERICAN PROVISIONS COMPLIANCE. Sourcewell issues solicitations for indefinite quantity cooperative purchasing master agreements which are made available to eligible public agencies. Sourcewell does not issue its solicitations or award its master agreements under any federal award, or specifically under any federal procurement standards related to Buy American or domestic preference. When utilizing federal funding, non-federal entities maintain responsibility for compliance with any specific requirements of the funding award including Buy American. Agencies should specifically verify whether the prospective purchasing implicates Buy American or other domestic preference requirements prior to executing any transaction document with suppliers. When domestic preference requirements are applicable, purchasing agencies must notify suppliers of requirements and either apply the appropriate preferences or secure an appropriate exemption and properly document the process prior to completing a purchase. 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.

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.

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.

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.

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

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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.

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.

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.

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.

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.

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.

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. Participating Entities will be responsible for notifying suppliers of any applicable requirements and compliance obligations (including any applicable domestic preference requirements) in resulting transaction documents.

Article II:
Sourcewell and Supplier Obligations

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

A. **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.

B. **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:

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- 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.

C. **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.

D. **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.

E. **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.

F. **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;

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- 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;

G. **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.

H. **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.

I. **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.

J. **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.

K. **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.

L. **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

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documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.

M. **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.

N. **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.

O. **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.

P. **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.

Q. **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.

R. **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.

S. **Grant of License.**

1. **During the term of this Agreement:**

   a. **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.

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

2. **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

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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.

3. **Use; Quality Control.**

   a. 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.

   b. 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.

4. **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.

T. **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 within any transaction documents.

U. **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.

V. **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:

1. **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.

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- $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

2. **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish 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, Staples, MN 56479 or provided 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.

3. **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.

4. **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.

5. **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.

W. **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.

X. **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 III:
Supplier Obligations to Participating Entities

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

A. **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Participating Entities are responsible for notifying Supplier of any applicable preference or procurement requirement (e.g. Buy American, etc.) which may impact Supplier's quote. 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.

B. **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. Participating Entities are encouraged to establish flexibility delivery schedules whenever possible.

C. **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.

D. **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.

E. **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.

F. **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.

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G. **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.

H. **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	IT Automation LLC
Signed by: Jeremy Schwartz C0FD2A139D06489...	DocuSigned by: Ravi Sumanam FE2C7819513C47F...
By: _____	By: _____
Jeremy Schwartz	Ravi Sumanam
Title: Chief Procurement Officer	Title: Director of Operations
Date: 11/6/2026 | 9:33 PM CST	Date: 11/6/2026 | 1:44 PM PST

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ATTACHMENT 1

PROVISIONS FOR PARTICIPATING ENTITIES' PROCUREMENTS UNDER UNITED STATES FEDERAL GRANT-FUNDED AWARDS AND FEMA AWARDS

Sourcewell's Cooperative Purchasing Program Master Agreements are available to Participating Entities. A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction and respective funding source restrictions. Participating Entities that are Recipients or Subrecipients of United States federal grant or other federal funding, including through the Federal Emergency Management Agency (FEMA), to purchase solutions from the Master 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. Accordingly, Sourcewell makes no representations or warranties, express or implied, regarding a Participating Entity's compliance with the laws of its jurisdiction or any other restrictions tied to its funding sources in connection with accessing the Master Agreement.

Within this Attachment:

- All references to "federal" should be interpreted to mean the United States federal government. All references to "recipient," "non-federal entity," or "subrecipient" should be interpreted to mean the Participating Entity accessing the Master Agreement;
- All references to "supplier" or "contractor" should be interpreted to mean the Supplier;
- All references to "subcontractor" should be interpreted to mean subcontractors of Supplier offering the solutions under the Master Agreement;
- None of the references should be interpreted as reference to Sourcewell; and
- None of the terms or conditions within this Attachment should be interpreted to obligate Sourcewell in any way.

The following terms and conditions apply when a Participating Entity accesses Supplier's solutions under the Master Agreement using United States federal funding sources.

A. **Davis-Bacon Act, As Amended (40 U.C.S. § 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, Suppliers 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, Suppliers 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

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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, "Suppliers 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 Supplier 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 be in compliance with all applicable Davis-Bacon Act provisions.

Supplier certifies that during the term of any Participating Entity contracts awarded under the Agreement, Supplier must comply with applicable requirements as referenced above.

B. **Copeland "Anit-Kickback" Act.**

1. **Supplier**. The Supplier shall comply with 18 U.S.C. § 874, 40 U.S.C. § 3145, and the requirements of 29 C.F.R. Part 3 as may be applicable, which are incorporated by reference into this contract.

2. **Subcontracts**. The Supplier or subcontractor shall insert in any subcontracts the clause above and such other clauses as FEMA may by appropriate instructions require, and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime Supplier shall be responsible for the compliance by any subcontractor or lower tier subcontractor with all of these contract clauses.

3. **Breach**. A breach of the contract clauses above may be grounds for termination of the contract, and for debarment as a Supplier and subcontractor as provided in 29 C.F.R. § 5.12.

C. **Contract Work Hours And Safety Standards Act (40 U.S.C. § 3701-3708).**

1. **Overtime requirements.** No Supplier or subcontractor contracting for any part of the contract work which may require or involve the employment of laborers or mechanics shall require or permit any such laborer or mechanic in any workweek in which he or she is employed on such work to work in excess of forty hours in such workweek unless such laborer or mechanic receives compensation at a rate not less than one and one-half times the basic rate of pay for all hours worked in excess of forty hours in such workweek.

2. **Violation; liability for unpaid wages; liquidated damages**. In the event **of any violation of the** clause set forth in paragraph (b)(1) of this section (29 C.F.R. §5.5) the Supplier and any subcontractor responsible therefor shall be liable for the unpaid wages. In addition, such Supplier and subcontractor shall be liable to the United States (in the case of work done under contract for the District of Columbia or a territory, to such District or to such territory), for liquidated damages. Such liquidated damages shall be computed with respect to each

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individual laborer or mechanic, including watchmen and guards, employed in violation of the clause set forth in paragraph (b)(1) of this section (29 C.F.R. §5.5), in the sum of $27 for each calendar day on which such individual was required or permitted to work in excess of the standard workweek of forty hours without payment of the overtime wages required by the clause set forth in paragraph (b)(1) of this section (29 C.F.R. §5.5).

3. **Withholding for unpaid wages and liquidated damages**. The grant recipient or sub-recipient shall upon its own action or upon written request of an authorized representative of the Department of Labor withhold or cause to be withheld, from any moneys payable on account of work performed by the Supplier or subcontractor under any such contract or any other federal contract with the same prime Supplier, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same prime Supplier, such sums as may be determined to be necessary to satisfy any liabilities of such Supplier or subcontractor for unpaid wages and liquidated damages as provided in the clause set forth in paragraph (b)(2) of this section (29 C.F.R. §5.5).

4. **Subcontracts**. The Supplier or subcontractor shall insert in any subcontracts the clauses set forth in paragraph (b)(1) through (4) of this section (29 C.F.R. §5.5) and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime Supplier shall be responsible for compliance by any subcontractor or lower tier subcontractor with the clauses set forth in paragraphs (b)(1) through (4) of this section (29 C.F.R. §5.5).
Supplier certifies that during the term of any Participating Entity contracts awarded under the Agreement, Supplier must comply with applicable requirements as referenced above.

D. **Rights To Inventions Made Under a Contract or Agreement.**
If the federal award meets the definition of "funding agreement" under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

Supplier certifies that during the term of any Participating Entity contracts awarded under the Agreement, Supplier must comply with applicable requirements as referenced above.

E. **Clean Air Act (42 U.S.C. § 7401-7671q.) And The Federal Water Pollution Control Act (33 U.S.C. § 1251-1387).**
Contracts and subgrants of amounts in excess of $150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

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Supplier certifies that during the term of any Participating Entity contracts awarded under the Agreement, Supplier must comply with applicable requirements as referenced above.

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

Supplier certifies that during the term of any Participating Entity contracts awarded under the Agreement, Supplier must comply with applicable requirements as referenced above.

G. **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).**
Suppliers who apply or bid for an award of more than $100,000 shall file the required certification. Each tier certifies to the tier above that it will not and has not used federally 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. Each tier shall also 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 recipient who in turn will forward the certification(s) to the federal awarding agency.

Supplier certifies that during the term of any Participating Entity contracts awarded under the Agreement, Supplier must comply with applicable requirements as referenced above.

If applicable, Suppliers must sign and submit the following certification to the NFE with each bid or offer exceeding $100,000:

"APPENDIX A, 44 C.F.R. PART 18 – CERTIFICATION REGARDING LOBBYING

Certification for Contracts, Grants, Loans, and Cooperative Agreements
The undersigned certifies, to the best of his or her knowledge and belief, that:

No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal,

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amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.

The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, Title 31, U.S.C. Any person who fails to file the required certification shall be subject to a civil penalty of not less than $10,000 and not more than $100,000 for each such failure.

The Supplier,_____, certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Supplier understands and agrees that the provisions of 31 U.S.C. Chap. 38, Administrative Remedies for False Claims and Statements, apply to this certification and disclosure, if any.

_____

Signature of Supplier's Authorized Official

_____

Name and Title of Supplier's Authorized Official

_____

Date

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

I. **Energy Policy And Conservation Act Compliance.**
To the extent applicable, Supplier must comply with the mandatory standards and policies relating to

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energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

J. **Buy American Provisions Compliance.**
Sourcewell issued the solicitation for an indefinite quantity cooperative purchasing master agreement which is available for use by eligible public agency Participating Entity. Sourcewell did not issue this solicitation or award any master agreement under a federal award. Responsibility for ensuring awareness, implementation, and compliance with all applicable federal procurement standards or requirements is that the Participating Entity. Compliance with all applicable federal, state, and local requirements, including those related to federal awards, is the responsibility of the Participating Entity.

Participating Entities are responsible for notifying Supplier of any applicable preference or procurement requirement (e.g. Buy American, etc.) which may impact Supplier's quote. To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

K. **Access to Records (2 C.F.R. § 200.336).**
Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Contract 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. (For FEMA funded projects see paragraph X.)

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

M. **Federal Seal(s), Logos, And Flags.**
The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval. (For FEMA funded projects see paragraph X.)

N. **No Obligation** by **Federal Government.**
The U.S. federal government is not a party to this Contract 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 Contract or any purchase by an authorized user.

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O. **Program Fraud and False or Fraudulent Statements or Related Acts.**
The Supplier acknowledges that 31 U.S.C. 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Contract or any purchase by a Participating Entity.

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

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

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

S. **Prohibition On Certain Telecommunications** a**nd Video Surveillance Services** o**r Equipment.**
To the extent applicable, Supplier certifies that during the term of this Contract it will comply with applicable requirements of 2 C.F.R. § 200.216. (For FEMA funded projects see paragraph X.)

T. **Domestic Preferences** f**or Procurements.**
To the extent applicable, Supplier certifies that during the term of this Contract, and any underlying contracts with Participating Entities, Supplier will comply with applicable requirements of 2 C.F.R. § 200.322.

U. **Build America, Buy America Act (BABAA).**
Sourcewell issued the solicitation for an indefinite quantity cooperative purchasing master agreement which is available for use by eligible public agency Participating Entity. Sourcewell did not issue this solicitation or award any master agreement under a federal award. Responsibility for ensuring awareness, implementation, and compliance with all applicable federal procurement standards or requirements is that the Participating Entity. Compliance with all applicable federal, state, and local requirements, including those related to federal awards, is the responsibility of the Participating Entity.

Participating Entities are responsible for notifying Supplier of any applicable preference or procurement requirement (e.g. Buy American, etc.) which may impact Supplier's quote.

Contractors and their subcontractors who apply or bid for an award for an infrastructure project subject to the domestic preference requirement in the Build America, Buy America Act shall file the required certification to (insert name of recipient/subrecipient) with each bid or offer for an

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infrastructure project, unless a domestic preference requirement is waived by the federal awarding agency. Contractors and subcontractors certify that no federal financial assistance funding for infrastructure projects will be provided unless all the iron, steel, manufactured projects, and construction materials used in the project are produced in the United States. BABAA, Pub. L. No. 117-58, §§ 70901-52. Contractors and subcontractors shall also disclose any use of federal financial assistance for infrastructure projects that does not ensure compliance with BABAA domestic preference requirements. Such disclosures shall be forwarded to the recipient who, in turn, will forward the disclosures to the federal awarding agency; subrecipients will forward disclosures to the passthrough entity, who will, in turn, forward the disclosures to the federal awarding agency.

V. **Partnerships with Faith-Based and Neighborhood Organizations (Executive Order 14015, Feb. 14, 2021; Federal Register, Vol. 89, No. 43).**

A faith-based organization that participates in this program retains its independence from the Government and may continue to carry out its mission consistent with religious freedom and conscience protections in Federal law.

A faith-based organization may not use direct Federal financial assistance from Participating Entity and/or the federal government to support or engage in any explicitly religious activities except when consistent with the Establishment Clause and any other applicable requirements. An organization, business, non-profit organization, partnership, limited liability corporation or partnership, corporation, individual, or other entity receiving Federal financial assistance also may not, in providing services funded by Participating Entity and/or the federal government, or in their outreach activities related to such services, discriminate against a program beneficiary or prospective program beneficiary on the basis of religion, a religious belief, a refusal to hold a religious belief, or a refusal to attend or participate in a religious practice.

All organizations receiving federal money through Participating Entity to provide social services shall provide the following notice, in substance, to beneficiaries of the protections listed herein:

> "Name of Organization:
> Name of Program:
> Contact Information for Federal Grant Program Office (name, phone number, and email address, if appropriate):
>
> Because this program is supported in whole or in part by financial assistance from the Federal Government, we are required to let you know that:
>
> - We may not discriminate against you on the basis of religion, a religious belief, a refusal to hold a religious belief, or a refusal to attend or participate in a religious practice;
>
> - We may not require you to attend or participate in any explicitly religious activities (including activities that involve overt religious content such as worship, religious instruction, or proselytization) that may be offered by our organization, and any participation by you in such activities must be purely voluntary;

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- We must separate in time or location any privately funded explicitly religious activities (including activities that involve overt religious content such as worship, religious instruction, or proselytization) from activities supported with direct Federal financial assistance

- You may report violations of these protections, including any denials of services or benefits by an organization, by contacting or filing a written complaint with the grant program office using the contact information set forth above; and

- If you would like to seek information about whether there are any other federally funded organizations that provide these kinds of services in our area, please use the contact information set forth above.

This written notice must be given to you before you enroll in the program or receive services from the program, unless the nature of the service provided or exigent circumstances make it impracticable to provide the actual service. In such an instance, this notice must be given to you at the earliest available opportunity."

W. **Additional FEMA Recommended Provisions:**

1. Prohibition on Contracting for Covered Telecommunications Equipment or Services.

a. Definitions. As used in this clause, the terms backhaul; covered foreign country; covered telecommunications equipment or services; interconnection arrangements; roaming; substantial or essential component; and telecommunications equipment or services have the meaning as defined in FEMA Policy 405-143-1, Prohibitions on Expending FEMA Award Funds for Covered Telecommunications Equipment or Services (Interim), as used in this clause—

b. Prohibitions.

i. Section 889(b) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019, Pub. L. No. 115-232, and 2 C.F.R. § 200.216 prohibit the head of an executive agency on or after Aug.13, 2020, from obligating or expending grant, cooperative agreement, loan, or loan guarantee funds on certain telecommunications products or from certain entities for national security reasons.

ii. Unless an exception in paragraph (3) of this clause applies, the contractor and its **subcontractors** may not use grant, cooperative agreement, loan, or loan guarantee funds from the Federal Emergency Management Agency to:

(a) Procure or obtain any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology of any system;

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(b) Enter into, extend, or renew a contract to procure or obtain any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology of any system;

(c) Enter into, extend, or renew contracts with entities that use covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system; or

(d) Provide, as part of its performance of this contract, subcontract, or other contractual instrument, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system.

c. Exceptions.

i. This clause does not prohibit Suppliers from providing—

(a) A service that connects to the facilities of a third-party, such as backhaul, roaming, or interconnection arrangements; or

(b) Telecommunications equipment that cannot route or redirect user data traffic or permit visibility into any user data or packets that such equipment transmits or otherwise handles.

ii. By necessary implication and regulation, the prohibitions also do not apply to:

(a) Covered telecommunications equipment or services that:

(1) Are not used as a substantial or essential component of any system; and

(2) Are not used as critical technology of any system.

(b) Other telecommunications equipment or services that are not considered covered telecommunications equipment or services.

d. Reporting requirement.

i. In the event the Supplier identifies covered telecommunications equipment or services used as a substantial or essential component of any system, or as critical technology as part of any system, during contract performance, or the Supplier is notified of such by a subcontractor at any tier or by any other source, the Supplier shall report the information in paragraph d.ii. of this clause to the recipient or subrecipient, unless elsewhere in this contract are established procedures for

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reporting the information.

ii. The **Supplier** shall report the following information pursuant to paragraph d.i of this clause:

(a) Within one business day from the date of such identification or notification: The contract number; the order number(s), if applicable; supplier name; supplier unique entity identifier (if known); supplier Commercial and Government Entity (CAGE) code (if known); brand; model number (original equipment manufacturer number, manufacturer part number, or wholesaler number); item description; and any readily available information about mitigation actions undertaken or recommended.

(b) Within 10 business days of submitting the information in paragraph d.ii.(b) of this clause: Any further available information about mitigation actions undertaken or recommended. In addition, the Supplier shall describe the efforts it undertook to prevent use or submission of covered telecommunications equipment or services, and any additional efforts that will be incorporated to prevent future use or submission of covered telecommunications equipment or services.

2. **Subcontracts.** The Supplier shall insert the substance of this clause, including this paragraph, in all subcontracts and other contractual instruments.

a. **Access to Records.** The Supplier agrees to provide (insert name of participating entity), (insert name of pass- through entity, if applicable), the FEMA Administrator, the Comptroller General of the United States, or any of their authorized representatives access to any books, documents, papers, and records of the Supplier which are directly pertinent to this contract for the purposes of making audits, examinations, excerpts, and transcriptions.

i. The Supplier agrees to permit any of the foregoing parties to reproduce by any means whatsoever or to copy excerpts and transcriptions as reasonably needed.

ii. The Supplier agrees to provide the FEMA Administrator or his authorized representatives access to construction or other work sites pertaining to the work being completed under the contract.

b. **DHS Seal, Logo, and Flags.** The Supplier shall not use the DHS seal(s), logos, crests, or reproductions of flags or likenesses of DHS agency officials without specific FEMA pre-approval. The Supplier shall include this provision in any subcontracts.

c. **Compliance with Federal Law, Regulations, And Executive Orders and Acknowledgement of Federal Funding.** This is an acknowledgement that FEMA financial assistance will be used to fund all or a portion of the contract. The Supplier will comply with all applicable federal law, regulations, executive orders, FEMA policies, procedures, and directives.

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d. **Copyright and Data Rights.**
License and Delivery of Works Subject to Copyright and Data Rights.

The Supplier grants to the (insert name of participating entity), a paid-up, royalty-free, nonexclusive, irrevocable, worldwide license in data first produced in the performance of this contract to reproduce, publish, or otherwise use, including prepare derivative works, distribute copies to the public, and perform publicly and display publicly such data. For data required by the contract but not first produced in the performance of this contract, the Supplier will identify such data and grant to the (insert name of participating entity) or acquires on its behalf a license of the same scope as for data first produced in the performance of this contract. Data, as used herein, shall include any work subject to copyright under 17 U.S.C. § 102, for example, any written reports or literary works, software and/or source code, music, choreography, pictures or images, graphics, sculptures, videos, motion pictures or other audiovisual works, sound and/or video recordings, and architectural works. Upon or before the completion of this contract, the Supplier will deliver to the (insert name of participating entity) data first produced in the performance of this contract and data required by the contract but not first produced in the performance of this contract in formats acceptable by the (insert name of participating entity).

e. **Build America, Buy America Act (BABAA) for Architectural and/or Engineering Contracts**
Build America, Buy America Act Preference.

Contractors and subcontractors agree to incorporate the Buy America Preference into planning and design when providing architectural and/or engineering professional services for infrastructure projects. Consistent with the Build America, Buy America Act (BABAA) Pub. L. 117- 58 §§ 70901-52, no federal financial assistance funding for infrastructure projects will be used unless all the iron, steel, manufactured projects, and construction materials used in the project are produced in the United States

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RFP 061726 - Enterprise Artificial Intelligence: Platforms, Services, and Integrated Delivery

Vendor Details

Company Name:	IT Automation LLC
Address:	1155 Kildaire Farm Rd, Suite 102 Ste 102 Cary, North Carolina 27511
Contact:	Ravi Sumanam
Email:	ravi@itautomation.com
Phone:	919-249-6373
Fax:	919-882-9969
HST#:	81-1998367

Submission Details

Created On:	Tuesday May 26, 2026 13:36:25
Submitted On:	Tuesday June 16, 2026 17:20:47
Submitted By:	Ravi Sumanam
Email:	ravi@itautomation.com
Transaction #:	3cf8ab22-2436-45aa-856d-cf1c81a9ddca
Submitter's IP Address:	10.13.1.4

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Specifications

Responsiveness Criteria

Demonstrated Experience at Enterprise Scale

As described in Section II of this RFP, each Proposer must select **one Primary Lot** in which to submit a proposal: **Lot 1, Lot 2, or Lot 3**. The selected Lot is determined by the Proposer and should reflect how the Proposer primarily delivers value to Participating Entities.

To be deemed responsive, a Proposer must provide sufficient evidence of enterprise-scale experience delivering artificial intelligence solutions in a qualifying highly regulated industry, consistent with the requirements of the Lot for which the proposal is submitted.

For purposes of this RFP, **highly regulated industries** are sectors subject to significant government oversight, compliance requirements, and legal or regulatory standards intended to promote safety, security, accountability, and ethical practices.

Whether an industry qualifies as highly regulated for the purposes of this RFP will be determined at the sole discretion of the evaluation team. Examples of such industries include, but are not limited to:

- Banking and financial services
- Insurance
- Healthcare and public health
- Federal, state, local, or tribal government
- K–12 education and higher education
- Public safety and criminal justice
- Public transportation and transit authorities
- Utilities and energy, where government-operated or regulated
- Defense and national security

The scale thresholds below serve as benchmarks for enterprise-scale engagements within qualifying highly regulated industries.

Lot 1 — AI Products and Platforms

The Proposer must demonstrate:

- At least **three (3) production deployments** that were active or completed within the **twenty-four (24) months** preceding the proposal submission deadline;
- Each deployment must support ongoing operational use by an **external client organization** in a qualifying highly regulated industry;
- At least **one (1)** of the three deployments must have a contract or engagement value of approximately **$50,000 or more**; and
- No more than **one (1)** deployment may be from the same client organization.

For purposes of this solicitation, a **production deployment** is a live, operational implementation that supports real-world business, programmatic, or mission functions and includes defined users, workflows, and measurable outputs. **Pilot projects, proofs of concept, and limited-scope demonstrations do not satisfy this requirement.**

Lot 2 — AI Professional Services

The Proposer must demonstrate:

- At least **one (1) external client** in a qualifying highly regulated industry;
- A total contract or engagement value for that client of approximately **$200,000 or more**; and
- The contract or engagement must have been active within the **twelve (12) months** preceding the proposal submission deadline.

Lot 3 — Integrated AI Delivery

The Proposer must demonstrate:

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- At least **one (1) external client** in a qualifying highly regulated industry;
- A total contract or engagement value for that client of approximately **$400,000 or more**; and
- The contract or engagement must have been active within the **twelve (12) months** preceding the proposal submission deadline.

Proposers must complete the corresponding Demonstrated Experience table for the selected Primary Lot (Lot 1, Lot 2, or Lot 3) below and meet the thresholds outlined above to be considered responsive to this RFP.

	Lot Choice *	
Indicate the single, Primary Lot to which you are responding and complete the following corresponding table.	Lot 1: AI Products & Platforms	*

Lot 1 Demonstrated Experience - AI Products & Platforms

If responding to Lot 1, Proposers must provide details for all three (3) production deployments below and meet the requirements established under the previous "Responsiveness Criteria" section. Enter "N/A" if not responding to this Lot.

Experience Type	**Experience Details**	**Response (answer N/A if not responding to Lot 1)** *	
Production Deployment 1		Town of Apex, North Carolina — Civic Engagement Mobile Application	
	Provide the following information for Production Deployment 1: • Client or organization name; • Type of qualifying industry; • Period of performance; and • Total contract or engagement value.	Client / Organization: Town of Apex, North Carolina — Mayor's Office Type of Qualifying Industry: Local Government / Municipal Administration and Civic Engagement. This is a highly regulated public-sector environment involving public records obligations, accessibility expectations, resident communications, municipal governance processes, and public-facing service delivery. Period of Performance: January 2024 – Present, ongoing production deployment Total Contract / Engagement Value: $210,000	*
	Provide the platform or product name, and briefly describe its purpose and capabilities.	Platform / Product Name: Sequora Agentic AI Platform — Civic Engagement Module The Sequora Agentic AI Platform was deployed for the Town of Apex as a production AI-enabled civic engagement and workflow automation platform supporting resident-to-government communication. The platform provides a mobile and cloud-based engagement channel that allows residents to submit inquiries, receive updates, access civic information, and interact with municipal communication workflows. For the Town of Apex, the Civic Engagement Module supports AI-assisted intake, classification, prioritization, and routing of resident inquiries to the appropriate municipal function or staff workflow. The platform also supports alerts, announcements, event communication, response coordination, workflow tracking, and auditable engagement records. Sequora operates alongside the Town's existing communication processes without requiring replacement of underlying systems.	*

		The platform includes human-in-the-loop governance controls so that AI-assisted outputs, routing logic, and response drafts remain subject to staff review and approval. It maintains searchable audit records of AI-assisted interactions, workflow actions, and communication history to support transparency, operational accountability, and public-sector recordkeeping.	
	Describe your organization's specific role and confirm that your organization held primary accountability for the overall solution. If subcontractors were used, describe their roles and explain how accountability was structured and governed.	Organization's Specific Role and Primary Accountability We served as the sole prime contractor and held full primary accountability for the overall Sequora deployment for the Town of Apex. Our team was directly responsible for platform design, development, configuration, deployment, integration support, user training, data governance, production operations, and ongoing support. No subcontractors, dealers, resellers, or third-party delivery partners were used for this engagement. All sales, implementation, configuration, training, and support activities were performed directly by our internal team. This provided the Town of Apex with a single accountable supplier from initial project planning through current ongoing production operations.	*
Production Deployment 2		Nebraska Department of Health and Human Services — Data Integration and AI Services Platform	
	Provide the following information for Production Deployment 2: • Client or organization name; • Type of qualifying industry; • Period of performance; and • Total contract or engagement value.	Client / Organization: Nebraska Department of Health and Human Services Reference Contact: Kaushal Shah, Senior Manager, Data Integration Services Email: kaushal.shah@nebraska.gov Phone: +1 (984) 301-8520 Location: Lincoln, Nebraska Type of Qualifying Industry: State Government / Healthcare and Human Services. This is a highly regulated environment involving Medicaid program operations, health and human services data, HIPAA-related privacy considerations, CMS Medicaid reporting expectations, state privacy obligations, and federal data governance requirements. Period of Performance: 2022 – Present, ongoing multi-year engagement Total Contract / Engagement Value: Approximately $2,000,000	*
	Provide the platform or product name, and briefly describe its purpose and capabilities.	Platform / Product Name: Sequora Agentic AI Platform — Data Integration and Validation Module Sequora was deployed to support Nebraska DHHS in a complex, production-oriented health and human services data environment involving Medicaid-related data integration, validation, reporting, and workflow modernization. The platform supports AI-assisted data integration, automated ETL validation, anomaly detection, data reconciliation, pipeline monitoring, reporting accuracy verification, and audit-ready operational reporting.	*

		The deployment supports multi-system data workflows involving cloud-based data services, including Azure Data Factory, Azure Databricks, Snowflake, Tableau, and related data integration environments. Sequora helps automate repetitive validation and monitoring activities that would otherwise require significant manual review, allowing DHHS stakeholders to improve data quality, identify exceptions earlier, and support more reliable compliance-driven reporting. The platform provides agentic workflow automation for data quality review, structured exception handling, data transformation validation, and operational reporting support. AI-assisted workflows are governed through access controls, audit logging, confidence thresholds, and human review processes so that sensitive healthcare and program data remains subject to appropriate oversight.	
	Describe your organization's specific role and confirm that your organization held primary accountability for the overall solution. If subcontractors were used, describe their roles and explain how accountability was structured and governed.	We served as the prime contractor and held full primary accountability for the platform solution, data integration architecture, cloud environment configuration, validation methodology, ETL support, reporting verification, stakeholder coordination, and production readiness activities. No subcontractors were used for this engagement. Our internal team directly performed the architecture, implementation, integration, validation, reporting, support, and governance-related activities. We maintained primary responsibility for platform performance, data integrity, security configuration, compliance support, and audit readiness throughout the engagement.	*
Production Deployment 3		Maine Department of Education — Administrative Automation and AI Services Platform	
	Provide the following information for Production Deployment 3: • Client or organization name; • Type of qualifying industry; • Period of performance; and • Total contract or engagement value.	Client / Organization: Maine Department of Education Type of Qualifying Industry: State Government / K–12 Education Administration. This is a highly regulated education environment involving student data privacy, FERPA-related obligations, state education reporting, public-sector records requirements, and administrative compliance workflows. Period of Performance: 2023 – Present, ongoing production deployment Total Contract / Engagement Value: Approximately $1,200,000	*
	Provide the platform or product name, and briefly describe its purpose and capabilities.	Through our product, we deployed to support Maine Department of Education administrative automation and AI-assisted workflow modernization. The platform supports AI-assisted compliance report generation, intelligent document processing, administrative workflow routing, stakeholder communication drafting, and cross-system coordination for education-related business processes. The Education Administration Module helps reduce manual effort associated with document compilation, data formatting, routine correspondence preparation, and recurring administrative reporting. It enables staff to process education-related submissions, generate draft	*

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		communications, review workflow outputs, and maintain auditable records of AI-assisted actions. The deployment is configured with governance controls appropriate for education administration, including role-based access, audit logging, human review requirements, data minimization, and controlled processing of authorized data categories. AI-generated outputs are routed for staff review before external distribution or operational use, ensuring that agency personnel retain authority over final communications, compliance submissions, and administrative actions. The platform delivered measurable improvement in administrative productivity by reducing manual document preparation, improving workflow consistency, and supporting faster completion of recurring reporting and communication tasks.	
	Describe your organization's specific role and confirm that your organization held primary accountability for the overall solution. If subcontractors were used, describe their roles and explain how accountability was structured and governed.	We served as the sole prime contractor and held full primary accountability for the Sequora deployment at the Maine Department of Education. Our responsibilities included platform design, configuration, education workflow development, data governance alignment, integration support, user training, production deployment, and ongoing support. No subcontractors, resellers, or third-party service providers were used. All implementation and support activities were performed directly by our internal team. We remained the exclusive point of accountability for platform performance, data security, education privacy alignment, service delivery, and ongoing production support throughout the engagement.	*

Lot 2 Demonstrated Experience - AI Professional Services

To be deemed responsive under Lot 2, Proposers must meet the requirements established under the previous "Responsiveness Criteria" section. Enter "N/A" if not responding to this Lot.

Experience Details	Response *	
Provide the following project information: • Client or organization name; • Type of qualifying industry; • Period of performance; and • Total contract or engagement value.	N/A	*
Describe the professional services contract or engagement, including scope and key deliverables.	N/A	*
Describe your organization's specific role and confirm that your organization held primary accountability for the overall solution. If subcontractors were used, describe their roles and explain how accountability was structured and governed.	N/A	*

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Lot 3 Demonstrated Experience - Integrated AI Delivery

To be deemed responsive under Lot 3, Proposers must meet the requirements established under the previous "Responsiveness Criteria" section. Enter "N/A" if not responding to this Lot.

Experience Details	Response *	
Provide the following project information: • Client or organization name; • Type of qualifying industry; • Period of performance; and • Total contract or engagement value.	N/A	*
Describe the integrated AI solution provided, including key components and scope.	N/A	*
Describe your organization's specific role and confirm that your organization held primary accountability for the overall solution. If subcontractors were used, describe their roles and explain how accountability was structured and governed.	N/A	*

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

General Instructions (applies to all Tables) Provide a concise response to each question. Do not attach additional documents to your response without providing a substantive response within the Specification Tables; attachments should be SUPPLEMENTAL to your answers. Do not leave answers blank; respond "N/A" if the question does not apply to your organization and include an explanation why it does not apply.

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, DBA, 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. Entities that have not been awarded will not be added to an existing master agreement through the affiliation of the Proposer's corporate organization.

#	Question	Response *	
1	Provide the legal entity name of the Proposer authorized to submit this Proposal.	IT Automation LLC	*
2	In the event of award, is the entity named in Line Item 1, the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y	*
3	Identify all subsidiaries, DBA, authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal.	N/A	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	MEH2AXDY84D7	*
5	Provide your NAICS code applicable to Solutions proposed.	Primary NAICS: 541512 – Computer Systems Design Services	

		Secondary NAICS: 541511 541519 518210 These align directly with Lot 1 AI Platforms and Infrastructure requirements described in the RFP.	
6	Proposer Physical Address:	1155 Kildaire Farm Road, Suite# 102, Cary, North Carolina - 27511	*
7	Proposer website address (or addresses):	https://itautomation.com/	*
8	Identify the Proposer's Authorized Representative, include name, title, address, email address, and phone number. The representative must have authority to sign the “Proposer’s Assurance of Compliance” on behalf of the Proposer.	Name: Ravi Sumanam Title: Director of Operations Company: IT Automation LLC Address: 1155 Kildaire Farm Road, Suite 102, Cary, NC 27511 Email: ravi@itautomation.com Phone: (919) 249-6373	*
9	Identify the Proposer's primary contact for this proposal, include name, title, address, email address, and phone number:	Name: Ravi Sumanam Title: Director of Operations Company: IT Automation LLC Address: 1155 Kildaire Farm Road, Suite 102, Cary, NC 27511 Email: ravi@itautomation.com Phone: (919) 249-6373	*
10	Identify the Proposer’s other contacts for this proposal, if any, include name, title, address, email address, and phone number.	Contact #1 Name: Sirisha Sumanam Title: Managing Member Company: IT Automation LLC Address: 1155 Kildaire Farm Road, Suite 102, Cary, NC 27511 Email: sirisha@itautomation.com Phone: +1 919-249-6373 Contact #2 Name: Sruthi Kanumuri Title: Sr. Manager/Client Services Company: IT Automation LLC Address: 1155 Kildaire Farm Road, Suite 102, Cary, NC 27511 Email: sruthi.k051@gmail.com Phone: +1 919-589-3926	*

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

#	Question	Response *	

11	Provide a brief history of your company and industry longevity related to the requested Solutions.	IT Automation LLC was founded in March 2016 and headquartered in Cary, North Carolina, we are a Limited Liability Company specializing in enterprise AI platform delivery, custom application development, cloud modernization, and system integration for government and regulated-industry clients. Over our nine years in operation, we have built deep expertise in NIST-aligned security frameworks, FedRAMP-aligned cloud environments, and WCAG accessibility standards, positioning us to serve highly regulated public sector entities. Our core offering, the Sequora Agentic AI platform, reflects a deliberate strategic focus on AI-driven government transformation, supported by an active GSA Multiple Award Schedule Contract (#47QTCA24D00BF) and a growing base of production deployments across local government, state health and human services, and state education administration.	*
12	Describe what specific outcomes or deliverables your company anticipates upon receiving an award from Sourcewell.	We anticipate that a Sourcewell award will expand our reach to participating entities nationwide, accelerating adoption of the Sequora Agentic AI platform across local, state, and education government clients in the United States and Canada that currently lack streamlined access to enterprise AI capabilities. Specific outcomes we expect include increased recurring subscription revenue through the platform's annual subscription model, expanded reference deployments across new states and provinces, and the ability to deliver measurable efficiency gains, including the 60% productivity improvement demonstrated in our existing engagements to a broader population of public sector organizations. We also expect the award to support our continued investment in compliance certifications, platform capabilities, and dedicated account management resources for the Sourcewell member community.	*
13	Provide non-confidential indicators that demonstrate your organization’s financial strength and long-term stability. Acceptable examples include such items as: • Annual revenue range (select a range—do not provide confidential statements) • Years in business • Publicly available SEC filings (if applicable) • Third party credit scores or ratings (e.g., D&B, bond ratings) • Letters of credit or financial backing from a banking institution Upload supporting documents (as applicable in the document upload section of your response). DO NOT PROVIDE ANY TAX	Years in business: 9 years (founded March 2016). Annual revenue range: $500,000 – $3,000,000 (varying by fiscal year as the business transitioned from project-based services delivery to a focused, recurring-subscription platform model centered on the Sequora Agentic AI platform). Active federal contracting vehicle: Active GSA Multiple Award Schedule Contract (#47QTCA24D00BF), which required federal review and validation of financial responsibility, pricing reasonableness, and past performance prior to award. Active SAM.gov registration: UEI MEH2AXDY84D7, in good standing, with no debarment, suspension, or exclusion from any federal, state, or local government program. Third-party certification: Nationally certified Women's Business Enterprise (WBENC Certification #WBE2303560, valid through December 31, 2026), reflecting third-party verification of organizational standing. No bankruptcy history: No bankruptcy proceedings in the past seven years, and none pending. Active client base: Three active, multi-year production engagements with government clients, including a $2,000,000	*

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	INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION. Refer to RFP Section VI. Subsection E. Disposition of Proposals.	multi-year engagement with the Nebraska Department of Health and Human Services (2022–Present) and a $210,000 completed engagement with the Town of Apex, North Carolina (2024–2025).	
14	Describe your US market share for your proposed Solutions. OR Provide the number of US Education and Government entities you have served over the past three (3) years, along with the total number of states where you have made sales.	Over the past three years, we have served two state government entities (Nebraska Department of Health and Human Services; Maine Department of Education) and one local government entity (Town of Apex, North Carolina), totaling three US Education and Government entities across two states: Nebraska and Maine, in addition to our home state of North Carolina. Total sales were made across three states. As a growing AI platform provider with an active GSA Multiple Award Schedule Contract, we anticipate this footprint expanding significantly through the Sourcewell master agreement, which will provide access to participating entities across all 50 states and Canadian provinces.	*
15	Describe your Canadian market share for your proposed Solutions. OR Provide the number of Canadian Education and Government entities you have served over the past three (3) years, along with the total number of provinces where you have made sales.	We have not yet served Canadian Education or Government entities and have no current Canadian market share for our proposed Solutions. We view the Sourcewell master agreement as a key vehicle for establishing our presence in the Canadian market, and we are prepared to extend the Sequora Agentic AI platform to Canadian participating entities, including data residency options within AWS Canadian regions, upon award.	*
16	Does your organization have any ongoing or completed bankruptcy proceedings, or have you been included as a possible Responsible Party within the past seven years? If yes, please explain. The proposer must provide notice in writing to Sourcewell if it enters bankruptcy proceedings at any time during the pendency of this RFP.	No. We have no ongoing or completed bankruptcy proceedings, and we have not been included as a possible Responsible Party in any bankruptcy proceeding within the past seven years. We will provide written notice to Sourcewell if we enter bankruptcy proceedings at any time during the pendency of this RFP.	*
17	Does your organization have any current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years? If so, please explain. 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.	No. We have no current or past debarments or suspensions, and no possible Responsible Party associated with our organization has been debarred or suspended within the past seven years. Our SAM.gov registration (UEI: MEH2AXDY84D7) is active and in good standing, confirming no exclusion from federal procurement programs. We will provide written notice to Sourcewell if we enter a debarment or suspension status at any time during the pendency of this RFP evaluation.	*
18	Describe any relevant industry	We received National Women's Business Enterprise	*

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	awards or achievements that your organization has received in the past three (3) years, including the year received.	Certification from the Women's Business Enterprise National Council (WBENC) in December 2023, processed and validated by the Greater Women's Business Council, a WBENC Regional Partner Organization (Certification #WBE2303560). We were also awarded a GSA Multiple Award Schedule Contract (#47QTCA24D00BF), reflecting federal recognition of our technical capability and pricing integrity.	
19	What percentage of your sales were to the government sector in the past three (3) years? This and the following line should not exceed 100%.	Approximately 40% of our sales over the past three years have been to the government sector, reflecting our engagements with the Town of Apex, North Carolina, and the Nebraska Department of Health and Human Services, delivered through our Sequora Agentic AI platform.	*
20	What percentage of your sales were to the education sector in the past three (3) years? This and the previous line should not exceed 100%.	Approximately 10% of our sales over the past three years have been to the education sector, reflecting our engagement with the Maine Department of Education, delivered through our Sequora Agentic AI platform.	*
21	List all state and cooperative purchasing agreements that you hold. Include the sales volume for each of these agreements over the past three (3) years.	We do not currently hold any state or cooperative purchasing agreements. We view the Sourcewell master agreement as a significant opportunity to establish our first cooperative purchasing vehicle, expanding access to the Sequora Agentic AI platform for participating entities nationwide.	*
22	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. Include the sales volume for each of these contracts over the past three (3) years.	We hold an active GSA Multiple Award Schedule Contract (#47QTCA24D00BF). No sales volume has been transacted under this contract to date, as the award is recently established. We anticipate leveraging both the GSA Schedule and the Sourcewell master agreement as complementary procurement vehicles to expand our sales volume across federal and state government clients going forward. We do not hold any Standing Offers and Supply Arrangements (SOSA) with the Canadian government at this time.	*

Table 2B: References/Testimonials

Line Item 23. Supply reference information from three customers **who operate in highly regulated industries**.

Entity Name *	Contact Name *	Phone Number *	
Town of Apex, North Carolina	Jacques K. Gilbert	919-522-9823	*
Nebraska Department of Health and Human Services	Kaushal Shah	984-301-8520	*
Maine Department of Education	Jayaveena Manda	667-234-0713	*

Table 3: Ability to Sell and Deliver Solutions (175 Points)

Describe your company’s capability to meet the needs of Sourcewell participating entities across the US and Canada, as applicable.

#	Question	Response *	

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24	How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b). a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned? b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?	b) Service Provider. We are best described as a service provider and platform developer. We directly design, develop, deploy, configure, implement, and support the Sequora Agentic AI platform for government and commercial clients. We do not rely on a dealer network, distributors, resellers, or third-party sales channels to deliver the proposed solution. All sales, implementation, configuration, training, support, and account management activities are performed by our direct employees. This structure provides Participating Entities with one accountable supplier and a clear single point of responsibility across the full sales-to-delivery lifecycle, including solution design, deployment, ongoing support, performance management, and customer success.	
25	Describe your sales force, their locations (e.g., regions, territories), number of direct employees (full-time equivalents) involved in each sector (GOV/EDU), and overlap between sales and service, as it relates to the requested	Our sales, technical presales, implementation, and support functions are performed by direct, full-time employees. We do not use third-party sales agents, dealers, distributors, or subcontracted sales resources to market, sell, configure, implement, or support the Sequora Agentic AI platform. Our organization has a team of approximately 50 professionals headquartered in Cary, North Carolina, with prior engagement experience across North Carolina, Nebraska, and Maine, and the ability to serve Sourcewell Participating Entities nationwide. Our current business development and delivery capacity is allocated approximately 40% to government clients, 10% to education clients, and 50% to commercial-	*

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	Solutions.	sector engagements. Our sales and service model is intentionally integrated rather than fully siloed. Business development, solution scoping, technical presales, implementation, training, and ongoing support are performed through overlapping teams. The same engineers, project leads, and solution specialists who support requirements discovery and proposal development often remain engaged through configuration, deployment, and post-go-live support. This approach ensures continuity from initial sales discussions through delivery, reduces handoff risk, and provides GOV and EDU Participating Entities with clear accountability, consistent communication, and reliable execution of the commitments made during the sales process.	
26	Describe your network of Authorized Sellers who will deliver Solutions, including the number and locations of dealers, distributors, resellers, and other distribution methods, as it relates to the requested Solutions.	We do not maintain or utilize a network of authorized sellers, dealers, distributors, or resellers. All Solutions proposed under this response, including the Sequora Agentic AI platform, are marketed, sold, implemented, and supported exclusively by our direct, full-time employees. Participating Entities purchasing through a resulting Sourcewell Master Agreement will work directly with our organization from initial inquiry and solution scoping through contracting, implementation, training, and ongoing support. No intermediary sales channel, independent dealer, reseller, or third-party distributor will be involved in any transaction. This direct delivery model ensures transparent pricing, consistent service quality, direct communication, and a single, clearly defined point of accountability for every Participating Entity engagement under the agreement.	*
27	Describe your service force, their locations (e.g., regions, territories), number of direct employees (full-time equivalents) involved in each sector (GOV/EDU), and overlap between sales and service, as it relates to the requested solutions.	Our service force is comprised entirely of direct, full-time employees headquartered in Cary, North Carolina. All implementation, configuration, integration, training, and ongoing support services for the Sequora Agentic AI platform are performed by our internal team. We do not use third-party service providers, subcontractors, managed service partners, or external delivery resources at any stage of implementation or support. Our 50-person team is organized to support the full delivery lifecycle, including platform engineering, solution architecture, system integration, data pipeline development, quality assurance, user training, and client support. As a focused platform provider, our personnel operate collaboratively across functions rather than through rigidly separated departments. The same solution architects, engineers, and project leads who participate in solution design and requirements discovery typically remain involved through implementation, go-live, and steady-state operations. This approach preserves institutional knowledge, strengthens client relationships, and ensures continuity throughout each Participating Entity engagement. Our current service force allocation is approximately as follows: Government (GOV): Approximately 8–10 direct employees actively support government-sector delivery, including local government, state agency, and federal-adjacent engagements.	*

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		Education (EDU): Approximately 2–3 direct employees currently support education-sector delivery, with additional internal capacity available to scale as education-related engagements expand under a resulting Sourcewell Master Agreement. Our sales and service functions intentionally overlap. Business development and technical presales personnel participate in implementation kickoff and early delivery activities, while delivery leads and technical specialists are involved during scoping and solution discussions. This integrated model reduces handoff risk and ensures Participating Entities continue working with personnel who understand the commitments made during the sales process and how those commitments will be delivered. We are headquartered in Cary, North Carolina, and currently serve clients in North Carolina, Nebraska, and Maine. Under the Sourcewell Master Agreement, our AWS-hosted SaaS delivery model enables us to onboard, implement, and support Participating Entities across the United States and Canada without requiring a physical office in each location. This cloud-based delivery approach removes geographic constraints, supports scalable service coverage, and allows us to provide consistent platform implementation and support to Participating Entities nationwide.	
28	Describe the ordering process from sales/consultation, how the order is placed, through project/order fulfillment. If orders are handled by distributors, dealers, or others, explain their roles and responsibilities in the ordering process.	Our ordering process is direct, transparent, and designed to minimize administrative burden for Sourcewell Participating Entities. We do not use distributors, dealers, resellers, or intermediary sales channels. Participating Entities work directly with our internal team from initial inquiry through order execution, implementation, go-live, and ongoing support. Step 1 — Initial Consultation and Needs Assessment A Participating Entity may contact us directly through our website, through the Sourcewell supplier channel, or through direct communication with our business development team. We conduct a complimentary needs assessment, typically through one or two virtual discovery sessions, to understand the entity's operational environment, priority use cases, existing systems, compliance requirements, user groups, implementation goals, and budget considerations. No purchase commitment is required during this stage. Step 2 — Solution Scoping and Written Proposal Based on the needs assessment, we prepare a written scope of work and pricing proposal aligned to the applicable Sourcewell Master Agreement pricing and not-to-exceed rates. The proposal identifies the recommended subscription tier, included workflows, deployment configuration, integration requirements, implementation approach, support level, timeline, and any optional services requested by the Participating Entity. The Participating Entity may review, clarify, and request modifications before proceeding. Step 3 — Order Placement Once the scope and pricing are accepted, the Participating Entity issues a Purchase Order referencing the applicable Sourcewell Master Agreement number and agreed scope of work. The Sourcewell cooperative agreement serves as the procurement vehicle for the transaction. Upon	*

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		receipt of the Purchase Order, we review the order for alignment with the agreed scope and provide written order acknowledgment within three business days. Step 4 — Onboarding and Platform Configuration After order confirmation, we initiate our structured onboarding process. A dedicated project lead is assigned, and a kickoff meeting is scheduled within five business days. The project lead coordinates discovery, configuration, integration planning, data preparation, security review, training coordination, and implementation activities with the Participating Entity's designated point of contact. Step 5 — Implementation and Deployment Implementation follows our standard phased delivery methodology: Discovery and Configuration, Pilot Deployment, Scale-Up, and Steady-State Transition. All implementation services are performed by our direct employees. The Participating Entity receives regular status updates, issue tracking, milestone reporting, and coordination support throughout the implementation period. Step 6 — Go-Live and Handover Following successful configuration, user acceptance testing, administrative review, and governance validation, the Sequora Agentic AI platform is moved into production. Administrator and end-user training are completed, platform documentation is delivered, and the engagement transitions from implementation to steady-state support under the applicable support tier. Step 7 — Ongoing Support and Account Management After go-live, the Participating Entity receives ongoing support through our support portal, email, or phone, depending on the selected support tier. A dedicated account manager provides regular check-ins, platform update notifications, support coordination, and annual capability roadmap reviews. Subscription renewals and any approved expansions are processed directly with our organization and continue to reference the applicable Sourcewell Master Agreement pricing. All transactions under the Sourcewell Master Agreement will be reported to Sourcewell in accordance with the required reporting schedule. Applicable administrative fees will be calculated and remitted to Sourcewell consistent with the Master Agreement terms.	
29	Describe, in detail, the process and procedure of your customer service program. Include your response times, escalation protocols, issue resolution timeframes, as well as any incentives that help your providers meet your stated service	Our customer service program is structured around clearly defined support tiers, response commitments, escalation protocols, and issue resolution targets. Each Participating Entity receives support aligned to its selected subscription and support level. Standard Support is included with Starter and Professional tiers. Support is available during business hours, Monday through Friday, 9:00 a.m. to 6:00 p.m. Eastern Time, through email and our ticketing portal. General inquiries and non-critical issues receive an initial response within one business day, with a standard resolution target of five business days. Enhanced Support is included with the Enterprise tier. This level provides	*

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	goals or promises.	extended-hour support, Monday through Saturday, 8:00 a.m. to 8:00 p.m. Eastern Time, with an initial response within four hours for critical issues. A dedicated support engineer is assigned to the Participating Entity's account to maintain continuity of knowledge across support interactions. Monthly account reviews are included. Mission-Critical Support is included with Enterprise+ and is also available as an add-on. This level provides 24/7/365 coverage with a one-hour initial response service level for critical incidents. A named support engineer familiar with the Participating Entity's deployment handles escalations, with an executive escalation path available for unresolved critical issues within four hours of the initial escalation request. All support requests are logged in our ticketing system and triaged by severity: Critical, High, Medium, or Low. Critical issues include platform outage, major service interruption, or suspected data security event. High-priority issues include significant workflow disruption. Medium issues include degraded performance or limited functionality impact. Low-priority items include general inquiries, configuration questions, and enhancement requests. Critical issues trigger immediate escalation to our engineering team and account management leadership. Participating Entities receive status updates at defined intervals until resolution is confirmed. For repeated service level breaches, Participating Entities may request a service credit review through their account manager. In addition, our account management team conducts quarterly performance reviews to identify service trends, address gaps, and prevent recurring issues before they escalate.	
30	Describe your capability to provide the requested Solutions to Sourcewell participating entities in the United States.	We are fully capable of delivering the Sequora Agentic AI platform to Sourcewell Participating Entities across all 50 United States. Our AWS-hosted SaaS delivery model eliminates geographic constraints by allowing Participating Entities to access the platform through a secure browser-based interface and API, without requiring on-site hardware installation or local infrastructure deployment. Our team is headquartered in Cary, North Carolina, and delivers implementation, configuration, training, and support services remotely, with on-site engagement available upon request. We currently serve clients in North Carolina, Nebraska, and Maine, and we have the staffing capacity, cloud infrastructure, and repeatable delivery methodology necessary to scale across additional states immediately upon award of a Sourcewell Master Agreement.	*
31	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	No geographic restrictions apply to Participating Entities in Hawaii, Alaska, or U.S. Territories. Because the Sequora platform is delivered as a cloud-based SaaS solution through AWS, there are no physical shipping, hardware delivery, or on-site installation limitations. Participating Entities in Hawaii, Alaska, Puerto Rico, Guam, the U.S. Virgin Islands, and other U.S. Territories will have access to the same platform capabilities, pricing structure, implementation methodology, and support services available to Participating Entities in the continental United States.	

		Implementation and training are delivered remotely. On-site visits may be arranged upon request and would be subject to applicable travel costs.	
32	Describe your capability to provide the requested Solutions to Sourcewell participating entities in Canada.	We are capable of extending the Sequora Agentic AI platform to Canadian Participating Entities under the Sourcewell Master Agreement. Our AWS-hosted SaaS delivery model can support Canadian data residency through AWS Canadian regions, including ca-central-1, when required by the Participating Entity. Although we have not yet served Canadian clients, our platform architecture, security controls, compliance posture, and cloud infrastructure are positioned to support Canadian deployments without material changes to our product or delivery model. Canadian Participating Entities may be supported through remote implementation, virtual training, secure configuration, and ongoing account management. Pricing for Canadian Participating Entities will be provided in U.S. dollars and Canadian dollars, as applicable.	*
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	There are no geographic areas of the United States or Canada that we will exclude from service under the proposed Sourcewell Master Agreement. All U.S. states, U.S. territories, and Canadian provinces are within the proposed service area. Our SaaS delivery model removes the physical distribution constraints that may apply to hardware-based or location-dependent offerings. Any Participating Entity with appropriate internet access may be onboarded, implemented, trained, and supported through our standard delivery and support model.	*
34	Identify any account type or Participating Entity type from the RFP that will not have full access to the requested Solutions if an agreement is awarded, along with the reason(s) why.	All Participating Entity types identified in the RFP will have access to our Solutions under the proposed Sourcewell Master Agreement. This includes governmental entities, higher education institutions, K–12 education entities, nonprofit organizations, tribal governments, and other eligible public agencies in the United States and Canada. We do not intend to exclude or restrict any eligible Participating Entity category from accessing the Sequora Agentic AI platform through the Sourcewell cooperative purchasing agreement. Access will be governed by the Participating Entity's eligibility, selected subscription tier, applicable scope of work, and mutually agreed transaction documents.	*
35	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Yes. We will extend the terms of the awarded Sourcewell Master Agreement to nonprofit entities that qualify as Sourcewell Participating Entities. Eligible nonprofit organizations will have access to the Sequora Agentic AI platform under the same not-to-exceed pricing structure, ordering process, implementation approach, and support model available to other Participating Entity types under the agreement.	*
36	Describe your implementation approach for AI solutions or services. Include:	Our implementation approach follows a structured four-phase methodology designed to support Participating Entities at varying levels of AI maturity. The approach emphasizes practical adoption, controlled rollout, governance alignment, user readiness, and secure platform operation.	

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	• Typical timeline and phases; • Required Participating Entity resources; • Approach for organizations with varying levels of AI maturity, including change management and user adoption; and • Considerations for compliance, data governance, or residency requirements during implementation.	Phase 1 — Discovery and Configuration, Weeks 1–3 We begin with a structured discovery process covering the Participating Entity's existing systems, data sources, compliance requirements, user roles, operational workflows, and priority use cases. Required entity resources are limited to a designated project coordinator, an IT contact for access and system coordination, and a business stakeholder to validate workflow requirements. This phase results in an approved configuration specification, implementation plan, and compliance review checklist. Phase 2 — Pilot Deployment, Weeks 3–6 We deploy the first production workflow within a controlled scope. This allows the Participating Entity to validate platform behavior, workflow accuracy, governance controls, and user experience before broader rollout. User acceptance testing, compliance validation, and accuracy benchmarking are completed during this phase. Required entity resources include a small group of pilot users and a compliance, legal, or governance contact for review and sign-off, as applicable. Phase 3 — Scale-Up, Weeks 6–12 After pilot validation, additional workflows, users, data sources, and integrations are onboarded. Administrator and end-user training are delivered during this phase. Change management support includes communication templates, user guides, adoption coaching, and stakeholder coordination to support user confidence and reduce resistance to AI-enabled workflows. Phase 4 — Steady State and Continuous Improvement, Ongoing Following go-live, the engagement transitions to steady-state operations. We conduct monthly model and platform performance reviews, quarterly optimization sessions, and annual capability roadmap planning with the Participating Entity's account team. New platform features are delivered as part of the SaaS subscription, subject to the applicable tier and configuration. Our approach is adaptable to each Participating Entity's AI maturity. For entities beginning their AI journey, we start with a single high-value, low-risk use case to build confidence and establish governance practices before expanding scope. For entities with more mature AI programs, we can support parallel workflow deployment, advanced integration, and API-enabled implementation from the beginning of the engagement. Compliance, data governance, and data residency considerations are addressed during Phase 1 and incorporated into the platform configuration before production use. For regulated environments such as HIPAA, FERPA, CJIS-aligned, or other compliance-sensitive settings, we configure appropriate access controls, audit logging, retention settings, data handling rules, and human-in-the-loop review workflows before go-live. Data for U.S. Participating Entities is maintained within AWS U.S. regions, and Canadian Participating Entities may request deployment configurations supporting AWS Canadian regions. All configuration decisions are documented and made available for Participating Entity compliance review.	

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37	Describe your ability to integrate with existing systems. Include: • Common enterprise or government systems supported; • Approach to legacy or custom environments; • Known limitations; • How data residency, security, and compliance requirements are maintained when integrating with external or legacy systems; and • If applicable, your role in enabling or advising on integrations.	The Sequora Agentic AI platform is designed as an integration-first enterprise system that operates alongside existing government and education technology environments rather than requiring Participating Entities to replace current systems. Our integration approach recognizes that public-sector organizations have established infrastructure, workflows, data repositories, and compliance obligations that must be preserved while AI capabilities are introduced. Common Enterprise and Government Systems Supported Sequora supports integration with widely used enterprise platforms and public-sector systems, including Microsoft SharePoint, Microsoft 365, Salesforce, ServiceNow, Oracle ERP, SAP, Workday, Snowflake, Azure Data Factory, Azure Databricks, Tableau, and major case management and ERP systems used in state human services and education administration. Our Nebraska DHHS engagement demonstrates this capability through integration across Azure Data Factory, Azure Databricks, Snowflake, and Tableau within a complex multi-system Medicaid data environment. Approach to Legacy and Custom Environments For legacy systems that do not expose modern REST APIs, we support integration through available secure access methods, including database connectors, SFTP, flat-file ingestion pipelines, scheduled exports, and RPA bridge integration where screen-level interaction is the only available access path. For custom-built agency systems, we conduct technical discovery during Phase 1 to assess the available integration surface, security requirements, data formats, and operational constraints before designing the appropriate connector or ingestion pathway. We have experience integrating with custom-built state agency systems that predate modern API standards. Known Limitations Successful integration requires that the target system provide some form of accessible data interface, such as an API, database connection, file export, SFTP transfer, or controlled screen-access pathway. Systems that are fully air-gapped and provide no data extraction or transfer mechanism cannot be integrated until the Participating Entity establishes an approved data exchange method. Any such limitations are identified during Phase 1 discovery, documented in the implementation plan, and addressed through recommended mitigation steps before implementation proceeds. We do not support real-time integration with classified systems above our current compliance posture. Data Residency, Security, and Compliance During Integration All data exchanged between Sequora and Participating Entity systems is transmitted through encrypted channels using TLS 1.2 or higher. Data accessed from Participating Entity systems is processed within our AWS-hosted environment and is not retained beyond the period required to complete the configured AI workflow unless the Participating Entity elects a longer retention period for audit, reporting, or reprocessing purposes. PII masking, data classification, access controls, and minimization rules are applied during ingestion before data reaches AI processing layers. For HIPAA, FERPA, CJIS-aligned, or other regulated environments,	

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		integration configurations are reviewed and documented during compliance onboarding. Where PHI is involved, a Business Associate Agreement is executed before PHI is accessed or processed. Our Role in Enabling Integrations We take responsibility for designing, building, testing, documenting, and maintaining integrations between Sequora and Participating Entity systems. Integration is not shifted to the Participating Entity as a separate technical burden. Our team owns connector development, testing, validation, and ongoing maintenance as part of the platform implementation and subscription model. Participating Entities are responsible only for providing required system access approvals, credentials, technical contacts, and security review participation necessary to establish the approved connection.	
38	Beyond the minimum experience provided for responsiveness, describe your broader experience delivering AI solutions or services in highly regulated industry environments. Include: • Representative sectors served; • Common compliance requirements addressed; • Outcomes achieved; and • Examples of how data residency, sovereignty, or jurisdictional requirements were managed.	Beyond our Lot 1 demonstrated experience deployments, our broader delivery experience reflects a consistent ability to operate in highly regulated environments where data sensitivity, regulatory accountability, operational continuity, and public trust are critical. Representative Sectors Served Our engagements span local municipal government, state health and human services, and state education administration. These sectors align closely with the needs of Sourcewell Participating Entities and involve complex regulatory, privacy, reporting, and governance obligations. Across these environments, we have supported requirements associated with HIPAA, FERPA, public records obligations, municipal operations, CMS Medicaid program reporting, and federal data governance expectations under applicable healthcare and public-sector regulations. Compliance Requirements Addressed In each engagement, compliance has been treated as a core delivery requirement. Our solutions incorporate role-based access controls, data access restrictions, audit logging of AI-assisted activity, human-in-the-loop review workflows, PII masking, data minimization, retention controls, and documentation to support internal and external audit obligations. These controls help ensure that AI-assisted workflows remain transparent, reviewable, and governed by authorized staff rather than operating as uncontrolled automation. Outcomes Achieved Our engagements have delivered measurable improvements in administrative productivity by automating document-intensive, repetitive, and compliance-sensitive workflows. In the Nebraska DHHS engagement, Sequora supported AI-assisted ETL validation and anomaly detection across Medicaid data pipelines, reducing manual reconciliation effort and improving reporting accuracy for compliance submissions. In the Maine DOE engagement, the platform supported automated compliance report generation and stakeholder communication workflows, reducing administrative workload associated with document preparation. In the Town of Apex engagement, Sequora supported constituent inquiry handling and response workflows, enabling the Mayor’s Office to scale civic engagement without adding staff.	

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		Data Residency, Sovereignty, and Jurisdictional Requirements In our U.S.-based engagements, Participating Entity data has remained within AWS U.S. regions, with no cross-border data transfer. For engagements involving sensitive regulated data, including Medicaid-related information, we maintain strict data boundary controls to ensure protected information is processed and stored only within the authorized AWS environment and is not transferred to unauthorized external systems. For Canadian Participating Entities under a resulting Sourcewell Master Agreement, we can support data residency within AWS Canadian regions, including ca-central-1, upon request. Jurisdictional data handling requirements are documented during Phase 1 discovery and enforced through platform configuration before production data is processed.	
39	Describe the security architecture of your solution or your role in designing or advising on secure AI environments. Include: • Certifications such as FedRAMP, StateRAMP, SOC 2, ISO 27001, or equivalent, and experience complying with applicable regulatory frameworks such as FERPA, HIPAA, CJIS, or similar; • Identity and access controls; • Data isolation between clients; • Data residency controls and geographic restrictions enforced within the architecture; • Subprocessor management, including location, access, and role in data processing; and • How security controls and architecture support and enforce compliance with applicable regulatory requirements.	The Sequora Agentic AI platform is built on Amazon Web Services infrastructure, which provides the foundational security architecture for all client deployments. Our security model is designed to support public-sector and regulated environments by combining cloud security controls, platform-level governance, data isolation, encryption, auditability, and configurable compliance enforcement. Certifications and Regulatory Framework Alignment Sequora is hosted within AWS environments that support the security expectations of federal, state, local government, education, and regulated-sector Participating Entities. Our platform supports HIPAA-aligned configurations, including Business Associate Agreements prior to processing any protected health information. FERPA-aligned configurations are supported for education environments. Platform controls are mapped to NIST 800-53 security control families to support Participating Entities' own FISMA and public-sector compliance obligations. Our user interface is designed to meet WCAG 2.1 Level AA accessibility standards in support of Section 508 accessibility requirements. We do not currently hold independent SOC 2 Type II or ISO 27001 certifications. However, Sequora is deployed on AWS infrastructure that maintains mature security certifications, including SOC 2 and ISO 27001, and we leverage those cloud-native controls as the security foundation for our platform deployments. Identity and Access Controls Access to Sequora is governed through role-based access control at the platform level. Each Participating Entity's designated administrator can define user roles, permissions, workflow access, and data access boundaries within its environment. Multi-factor authentication is supported and recommended for all administrative accounts. Session management, access logging, and automatic timeout controls are enforced by default to reduce unauthorized access risk. Data Isolation Between Clients Each Participating Entity's data is logically isolated within our AWS-hosted environment through dedicated data namespaces, encrypted storage, and access controls designed to prevent cross-client access. One Participating	

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		Entity's data is never available to another entity's users, administrators, or AI workflows. For Participating Entities requiring physical isolation, dedicated single-tenant deployment options are available upon request. Data Residency Controls and Geographic Restrictions Data residency is established during onboarding and enforced through infrastructure configuration. Data for U.S. Participating Entities is stored and processed within AWS U.S. regions unless otherwise authorized by the Participating Entity. Canadian Participating Entities may request deployment configurations using AWS Canadian regions, including ca-central-1. Data is not transferred outside the authorized geographic region without Participating Entity approval. Subprocessor Management Our primary subprocessor is Amazon Web Services, which provides the cloud infrastructure, storage, compute, and security foundation for the Sequora platform. We do not engage additional subprocessors that access or process Participating Entity data without prior disclosure and agreement. A current subprocessor list is available upon request and will be maintained throughout the term of any resulting Sourcewell Master Agreement. Security Controls Supporting Regulatory Compliance Sequora generates time-stamped audit logs for AI inferences, agent actions, user activity, workflow changes, and human review actions. Audit logs are retained within the Participating Entity's configured environment and support regulatory review, public records requests, internal compliance audits, and operational oversight. Encryption is enforced for data at rest using AES-256 and for data in transit using TLS 1.2 or higher. Vulnerability management, monitoring, and security patching are performed by our engineering team on a defined cadence. Critical security patches are prioritized and applied within 24 hours of release or validation, based on severity and operational impact.	
40	Describe how your solution or services scale across organizations of different sizes. Include: • Performance as usage grows or fluctuates; • Multi-tenant vs dedicated environments (if applicable); and • Service level commitments.	The Sequora platform is architected on AWS to scale with Participating Entity demand, from small municipalities and school districts with limited user groups to large state agencies processing high volumes of documents, requests, workflows, and AI transactions. Scaling is handled at the infrastructure and platform levels and is transparent to the Participating Entity. Performance as Usage Grows or Fluctuates Sequora uses AWS cloud infrastructure to support elastic scaling as usage increases or fluctuates. Additional compute capacity can be provisioned in response to periods of increased activity, such as benefits enrollment cycles, end-of-year reporting periods, emergency response events, or spikes in citizen inquiry volume. Capacity can also scale down when usage normalizes, helping maintain cost efficiency. Participating Entities are not required to pre-provision infrastructure or manage capacity planning. Platform performance, response times, processing queues, and throughput are monitored continuously. Our	

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		engineering team receives alerts when performance thresholds are approached so that scaling actions can be taken before users experience material service degradation. Multi-Tenant and Dedicated Environment Options Our standard SaaS delivery model is multi-tenant, with each Participating Entity's data logically isolated through dedicated namespaces, encryption, and access controls. This model provides a cost-effective and scalable way for Participating Entities to access enterprise AI capabilities. For entities with heightened security, privacy, or data sensitivity requirements, Sequora can also be deployed in a dedicated single-tenant environment within AWS. Dedicated deployments are available for Enterprise and Enterprise+ subscription tiers and are priced according to the required infrastructure, isolation, and support model. Service Level Commitments We commit to 99.9% monthly platform availability for production environments, excluding scheduled maintenance windows. Scheduled maintenance is communicated at least 72 hours in advance and is typically performed during low-usage periods, such as weekends between 11:00 p.m. and 4:00 a.m. Eastern Time, to minimize operational impact. Availability metrics are included in monthly account reviews for Enhanced and Mission-Critical support clients and are available upon request for Standard support clients. Service level performance is reviewed as part of ongoing account management and continuous improvement activities.	
41	Describe the level of control Participating Entities have over AI system behavior or implementations you support. Include: • Ability to configure models, prompts, or workflows; • Administrative controls; • Ability to enable or disable features; and • Ability to restrict or configure system behavior based on jurisdictional, regulatory, or data governance requirements.	Participating Entities have substantial control over Sequora's AI behavior within their own environments. This control model is intentionally designed for government, education, and regulated organizations that must remain accountable to constituents, students, patients, oversight bodies, public records laws, and internal governance requirements. Model, Prompt, and Workflow Configuration Each Participating Entity's designated administrators can configure active AI workflows, define prompts and instructions for approved use cases, set confidence thresholds, determine when outputs require human review, and adjust workflow logic as policies or operational needs evolve. Configuration changes are version-controlled, and a full change history is maintained for audit and governance purposes. Administrative Controls Participating Entity administrators have access to an administration console that provides visibility into platform activity, user management, workflow status, integration activity, and performance metrics. Administrators can add or remove users, modify permissions, activate or deactivate workflows, review AI activity logs, and manage routine configuration settings without requiring vendor assistance for standard administrative tasks. Feature Enablement and Disablement Platform features and AI capabilities can be enabled or disabled at the	

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		Participating Entity level. For example, an entity may disable autonomous agent execution for a sensitive workflow and require human approval for every output in that workflow, while allowing lower-risk workflows to operate with different review thresholds. Feature changes are logged and can be reviewed as part of the audit trail. Jurisdictional, Regulatory, and Data Governance Configuration Sequora allows Participating Entities to configure data classification rules, access restrictions, human review requirements, retention policies, deletion rules, workflow approval gates, and jurisdictional data boundaries. These controls help ensure that AI workflows operate only on authorized data, within approved use cases, and under the governance requirements defined by the Participating Entity. Participating Entities can also restrict AI outputs to approved response categories, require human review for consequential decisions, define records retention settings aligned to their policies, and enforce geographic data boundaries so that data remains within authorized regions. These configurations are documented, auditable, and available for review by the Participating Entity's compliance, legal, records, privacy, or oversight personnel.	
42	Describe any dependencies on third-party models, platforms, or providers. Include: • Use of external LLMs or APIs; • Ability to switch models or providers and vendor lock-in considerations; • Location and jurisdiction of third-party providers and any associated data transfer implications; • Whether third-party providers may access Participating Entity data and under what conditions; and • If applicable, how you advise clients on managing these risks.	The Sequora Agentic AI platform is built on AWS cloud infrastructure and may leverage third-party AI model providers as part of its underlying capability stack. We are transparent about these dependencies and have designed Sequora to minimize vendor lock-in, preserve Participating Entity control, and protect sensitive data throughout the AI processing lifecycle. Use of External LLMs or APIs Sequora may use large language model APIs and foundation model services from leading AI providers, including Amazon Bedrock and other approved model providers, to support AI inference, natural language processing, document intelligence, summarization, workflow automation, and agentic reasoning. The specific models enabled for a Participating Entity's deployment are disclosed during onboarding and documented in the platform configuration record. We continue to evaluate model performance, cost, security, compliance posture, and availability as the AI market evolves. Ability to Switch Models or Providers and Vendor Lock-In Considerations Sequora is designed to be model-agnostic at the application layer. Workflows, governance rules, audit logs, administrative settings, prompts, and user configurations are not hard-coded to a single model provider. This allows us to transition between approved model providers when needed for performance, cost, compliance, availability, or security reasons, while minimizing disruption to Participating Entity operations. If a model change is required, we provide affected Participating Entities with advance notice, impact assessment, testing support, and a transition plan. Our objective is to avoid dependency on any single AI model vendor and to preserve long-term flexibility for Participating Entities as model capabilities and compliance requirements evolve.	

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		Location and Jurisdiction of Third-Party Providers and Data Transfer Implications Our primary infrastructure provider is Amazon Web Services. For U.S. Participating Entity deployments, Sequora is configured to store and process data within AWS U.S. regions unless otherwise authorized by the Participating Entity. Where Amazon Bedrock or other approved AWS-native model services are used, inference processing is configured to remain within the authorized regional boundary to the extent supported by the selected service and deployment configuration. For Canadian Participating Entities, Sequora can be configured to support AWS Canadian regional deployment options upon request. We do not intentionally route Participating Entity data through model providers or processing locations outside the authorized geographic boundary without Participating Entity review and approval. Third-Party Provider Access to Participating Entity Data Participating Entity data submitted to approved model services is used only for the configured AI workflow and is governed by the applicable data processing terms for the selected provider. We do not opt Participating Entities into model training programs that would allow their data to be used to train or improve third-party foundation models. Where supported by the provider and service configuration, inference data is processed transiently and not retained beyond the period necessary to complete the requested processing. We maintain documentation of approved third-party model and infrastructure providers and make subprocessor and data flow summaries available to Participating Entities upon request. Additional providers that would access or process Participating Entity data are not introduced without appropriate disclosure and approval. Risk Advisory and Client Guidance During Phase 1 onboarding, we conduct a third-party dependency and data flow review with each Participating Entity. This review identifies the model providers in use, the categories of data submitted for inference, the geographic boundaries of processing, retention settings, contractual protections, and applicable risk controls. For environments involving heightened sensitivity, such as Medicaid data, student records, justice-related data, or other regulated information, we configure additional safeguards before production use. These may include data minimization, PII masking, redaction, role-based access restrictions, human-in-the-loop review, and workflow-specific approval gates. Our goal is to ensure that protected information is not unnecessarily exposed to external model services and that Participating Entities understand and control the risk profile of each AI-enabled workflow.	

Table 4: Marketing Plan (100 Points)

#	Question	Response *	

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43	Describe your marketing strategy, including tactics/methods and timelines for promoting this opportunity to participating entities for the requested solutions. Upload optional samples of your marketing materials.	IT Automation LLC will implement a comprehensive public-sector marketing strategy designed to promote the awarded Sourcewell contract to participating entities nationwide. Marketing activities will begin immediately upon contract award and will continue throughout the contract term. During the first 90 days, we will launch contract announcement campaigns, update our website with Sourcewell-specific landing pages, develop contract collateral, and conduct outreach to existing government, education, healthcare, transportation, and public safety customers. Marketing tactics will include email campaigns, digital advertising, webinars, conference participation, educational demonstrations, thought leadership content, social media engagement, partner outreach, and targeted account-based marketing. Ongoing activities will include quarterly webinars, case studies, product demonstrations, industry event participation, customer success stories, contract awareness campaigns, and direct engagement with procurement officials, technology leaders, and department stakeholders. Marketing efforts will focus on increasing awareness of cooperative purchasing benefits while helping participating entities accelerate AI adoption through compliant procurement pathways.	*
44	Describe your use of technology and digital data (e.g., specific social media platforms, metadata usage) to enhance and/or optimize your marketing strategy described above.	IT Automation LLC utilizes a data-driven marketing approach supported by CRM, marketing automation, analytics platforms, and digital engagement tools. Marketing activities leverage website analytics, campaign performance metrics, customer engagement data, webinar participation metrics, social media analytics, email performance tracking, and customer feedback data. Digital marketing efforts utilize LinkedIn, YouTube, Google Search, email automation platforms, webinar platforms, and targeted digital advertising to reach public-sector decision-makers. Performance metrics such as click-through rates, engagement levels, lead conversion rates, content downloads, event participation, and customer interactions are continuously monitored to optimize campaigns and improve outreach effectiveness. Marketing intelligence is used to identify target agencies, personalize communications, measure contract awareness, and support continuous improvement of marketing activities throughout the contract lifecycle.	*
45	In your view, what is Sourcewell’s role in promoting agreements resulting from this RFP?	Sourcewell serves as a trusted cooperative purchasing organization that simplifies procurement for participating entities while providing national visibility for awarded suppliers. Sourcewell's role includes promoting awarded contracts through its cooperative purchasing platform, educational resources, marketing programs, events, customer outreach initiatives, and contract discovery tools. Sourcewell's reputation, compliance processes, and nationwide member network help participating entities confidently identify qualified solutions providers while reducing procurement complexity. IT Automation LLC views Sourcewell as a strategic partner whose promotional activities complement our own outreach efforts and help maximize contract	*

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		utilization among eligible entities.	
46	Describe how your organization will integrate a Sourcewell awarded agreement (e.g., training, incentives) into your sales process.	Upon contract award, IT Automation LLC will fully integrate the Sourcewell agreement into its sales, marketing, customer support, and contract management processes. Sales personnel will receive training regarding Sourcewell cooperative purchasing procedures, contract terms, pricing structures, eligibility requirements, and customer onboarding processes. The Sourcewell contract number will be incorporated into proposals, quotations, presentations, marketing materials, CRM systems, and customer communications. Sales representatives will proactively identify opportunities where Sourcewell purchasing can streamline procurement and accelerate project implementation. Internal incentives will focus on contract adoption, customer satisfaction, and successful project outcomes. Dedicated contract management personnel will support participating entities throughout procurement, implementation, and ongoing account management activities.	
47	Are your Solutions available through an e-Procurement or e-Commerce ordering process? If so, describe your system(s) AND provide one (1) example of how governmental and educational customers have successfully utilized them.	Yes. IT Automation LLC supports electronic procurement and digital purchasing workflows through multiple procurement channels. Customers may engage through electronic quotation processes, digital contract management systems, electronic purchase orders, online proposal submissions, secure invoicing platforms, and integrated procurement workflows. Our organization routinely supports government agencies, educational institutions, healthcare organizations, and public-sector entities utilizing electronic procurement environments. We can accommodate customer-specific procurement requirements, supplier portals, vendor management systems, electronic approvals, and digital purchasing processes. Examples include supporting electronic procurement workflows utilized by state agencies, local governments, educational institutions, transportation authorities, and healthcare organizations where procurement activities, contract administration, invoicing, and project management are conducted electronically to improve efficiency, transparency, and compliance.	*

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

#	Question	Response *	
48	Describe any training programs related to your proposed Solution(s) available to Sourcewell participating entities.	Training is included as a standard component of every Sequora platform subscription and is not treated as an optional add-on. All training is delivered directly by our internal team members who understand the Participating Entity's specific deployment configuration, workflows, user roles, and governance requirements. Administrator Training Administrator training is included in all subscription tiers. This training covers	*

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	Include details, such as whether training is standard or optional, who provides training, delivery methods, and any costs that apply.	platform configuration, user management, workflow design, integration management, governance console operation, audit log review, and routine administrative controls. Training is delivered virtually through instructor-led sessions across two half-day sessions, totaling approximately eight hours. On-site administrator training is available upon request at applicable travel cost. End User Training End user training is included in all subscription tiers. This training is role-specific and designed for operational staff who interact with AI-assisted workflows as part of their daily responsibilities. It is delivered as a virtual webinar session of approximately two hours, with a recorded replay available for future staff onboarding. Contextual in-platform guidance and embedded help documentation are also available to users at no additional charge. Technical and IT Training Technical and IT training is included in Enterprise and Enterprise+ tiers. This training covers API integration, data pipeline management, security configuration, access control administration, audit log export, and technical support coordination. It is delivered as a virtual instructor-led session of approximately four hours. Sourcewell Member Onboarding Program Participating Entities accessing Sequora for the first time through a Sourcewell Master Agreement receive a complimentary 30-day structured onboarding program. This program includes two administrator training sessions, one end-user training webinar, and weekly check-in calls during the first month of production operation. All training materials, including slide decks, user guides, quick-reference cards, and recorded sessions, are provided to the Participating Entity for internal distribution and future staff onboarding. There is no per-seat or per-session training charge within the included training scope. Additional custom training beyond the included scope is available at the standard professional services rate listed in our pricing schedule.	
49	Describe any technological advances that your proposed Solutions offer.	The Sequora Agentic AI platform represents a meaningful technological advancement over conventional government software by combining agentic automation, integration-first architecture, governance-by-design, and continuous model evolution in a single enterprise platform. Agentic AI for Government Operations Unlike conventional AI tools that primarily generate text, classify documents, or summarize information in isolation, Sequora deploys AI agents capable of planning, executing, and adapting multi-step workflows across organizational systems. These agents can reason through operational variability, handle exceptions, route items to the correct workflow, and escalate to human reviewers when needed. This shifts AI from a passive assistance tool to an active operational capability that supports measurable productivity improvement in government workflows. Integration-First Architecture Many enterprise AI platforms require organizations to migrate data into a new	*

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		environment before AI can operate effectively. Sequora is designed to connect with data and workflows where they already exist, including government ERP systems, case management platforms, document repositories, communication tools, and reporting environments. This reduces deployment risk, avoids unnecessary system replacement, shortens implementation timelines, and preserves existing technology investments. Governance-by-Design Responsible AI controls are built into Sequora's architecture rather than added as optional modules after deployment. These controls include audit logging, human-in-the-loop review, confidence thresholds, explainability outputs, data boundary enforcement, access controls, and workflow-level governance settings. As a result, Participating Entities begin with a governance posture designed for public-sector accountability from the first day of production use. Continuous Model Evolution As an AWS-hosted SaaS platform, Sequora allows Participating Entities to benefit from ongoing improvements in AI model performance, domain-specific capabilities, integration features, and workflow automation without managing their own model infrastructure. Platform enhancements are delivered through the standard SaaS update process, helping Participating Entities stay current as AI technologies evolve.	
50	Describe any sustainability initiatives or certifications that relate to your organization and/or proposed Solutions. If applicable, describe the certification(s) for each initiative.	Our sustainability approach is reflected in both our SaaS delivery model and our operational practices. SaaS Delivery Reduces Hardware Waste Because Sequora is delivered as a SaaS platform, Participating Entities do not need to procure, power, cool, maintain, or dispose of dedicated AI compute hardware. This reduces electronic waste and avoids the energy consumption associated with on-premise AI infrastructure. AWS Sustainability Infrastructure Sequora production environments operate on Amazon Web Services infrastructure. AWS has publicly committed to powering its operations with renewable energy and achieving net-zero carbon across its operations by 2040 under The Climate Pledge. By hosting Sequora on AWS, our platform benefits from the sustainability investments and environmental commitments of a global cloud infrastructure provider. Compute Efficiency We use model optimization and inference efficiency practices to reduce the compute resources required for AI tasks while preserving output quality. More efficient inference reduces energy consumption per workflow and supports sustainable scaling as Participating Entity usage grows. Remote-First Delivery Implementation, training, account management, and support services are delivered remotely by default. This reduces the travel-related carbon footprint typically associated with traditional enterprise software deployments. On-site visits remain available when requested, but remote delivery is our standard model.	*

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		We do not currently hold independent environmental certifications such as ISO 14001. Our sustainability posture is supported by AWS's published sustainability commitments, environmental certifications, and cloud efficiency practices.	
51	Describe any third-party issued, eco-labels, ratings, or certifications that your proposed solutions hold.	The Sequora Agentic AI platform does not currently hold an independent third-party eco-label or environmental rating specific to the platform itself. Sequora's environmental posture is supported by the AWS infrastructure on which the platform operates. AWS maintains environmental and energy management certifications, including ISO 14001 and ISO 50001, and publishes renewable energy and carbon reduction commitments under The Climate Pledge. These certifications and commitments apply to the infrastructure layer supporting Sequora deployments. In addition to sustainability-related infrastructure certifications, our organization holds an active WBENC National Women's Business Enterprise Certification, Certification #WBE2303560, valid through December 31, 2026. We also hold an active GSA Multiple Award Schedule Contract, Contract #47QTCA24D00BF, reflecting federal procurement validation of our technical and business capabilities.	*
52	What aspects of your company, solutions, or services are truly unique in the marketplace, and why are these unique advantages meaningful for Sourcewell participating entities?	Several attributes of our organization and the Sequora platform are meaningfully differentiated in the enterprise AI marketplace, particularly for government, education, nonprofit, tribal, and public-sector Participating Entities. Certified Diverse AI Platform Provider We are a certified diverse supplier, including Women's Business Enterprise certification through WBENC. For Participating Entities with supplier diversity goals, equity commitments, or small and diverse business participation objectives, procuring Sequora through a Sourcewell Master Agreement provides a way to advance those goals while also acquiring an enterprise AI platform. Direct Delivery Without Intermediary Layers Many enterprise technology vendors rely on resellers, system integrators, channel partners, or subcontracted delivery teams. Our delivery model is direct. Participating Entities work with the internal team responsible for designing, configuring, implementing, and supporting the platform. This reduces communication gaps, avoids reseller margin layering, and provides a single accountable party from initial engagement through ongoing support. Production Government AI Experience Sequora is not limited to pilot or proof-of-concept use. The platform has been deployed in production government environments and has supported measurable productivity improvements in document-intensive and workflow-heavy operations. Participating Entities can evaluate Sequora as an operationally proven platform rather than an experimental AI concept. Government-Focused Platform Built for Accountability Sequora was designed for regulated, accountable environments where	*

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		auditability, human review, data controls, records obligations, and public trust are central requirements. Governance controls, audit logs, human-in-the-loop workflows, and compliance configurations are core platform capabilities rather than afterthoughts adapted from a commercial-only product. Complementary Procurement Pathways Our active GSA Multiple Award Schedule Contract, Contract #47QTCA24D00BF, complements a potential Sourcewell Master Agreement by giving eligible entities more than one compliant procurement pathway to access Sequora. This procurement flexibility is meaningful for public-sector entities that must align purchases with grant requirements, agency procurement rules, or cooperative purchasing preferences.	

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Table 5B: Value-Added Attributes

Select any business certifications that your company or partners have obtained. Upload your confirming documentation.

Select all that apply below.

#	Certification	Offered	Comment	
53	Minority Business Enterprise (MBE)	(•) Yes ( ) No	IT Automation LLC is a certified Minority Business Enterprise (MBE) and is majority-owned, controlled, and actively managed by minority ownership. The company maintains minority business certifications and participates in supplier diversity programs supporting public and private sector procurement initiatives.	*
54	Women Business Enterprise (WBE)	(•) Yes ( ) No	IT Automation LLC is a nationally certified Women Business Enterprise (WBE) through WBENC (Certification No. WBE2303560), valid through December 31, 2026. The company is woman-owned, operated, and controlled in accordance with WBENC certification standards	*
55	Disabled-Owned Business Enterprise (DOBE)	( ) Yes (•) No	N/A	*
56	Veteran-Owned Business Enterprise (VBE)	( ) Yes (•) No	N/A	*
57	Service-Disabled Veteran-Owned Business (SDVOB)	( ) Yes (•) No	N/A	*
58	Small Business Enterprise (SBE)	(•) Yes ( ) No	IT Automation LLC is a certified North Carolina Small Business Enterprise (NCSBE Certification No. NCSBE-389885), valid through March 2028. The company meets North Carolina's eligibility requirements for small business participation and government contracting programs.	*
59	Small Disadvantaged Business (SDB)	(•) Yes ( ) No	IT Automation LLC qualifies as a Small Disadvantaged Business (SDB) and is majority-owned and controlled by socially and economically disadvantaged individuals. The company actively participates in supplier diversity and small business procurement programs serving government and commercial clients.	*
60	Women-Owned Small Business (WOSB)	(•) Yes ( ) No	IT Automation LLC is a certified Women-Owned Small Business (WOSB) under the SBA WOSB Program (Certification No. WOSB240267), with certification valid through December 31, 2026. The company is majority-owned and controlled by a qualifying woman owner and is eligible to participate in federal WOSB contracting opportunities.	*

Table 6A: Pricing (200 Points, applies to Table 6A, 6B, and 6C)

Provide detailed pricing information in the questions that follow below.

#	Question	Response *	
61	Describe your payment terms.	Our standard payment terms are Net 30 days from the date of invoice. Annual subscription invoices are issued at the start of each subscription year. For multi-year engagements, invoices are issued annually in advance at the beginning of each contract year. Implementation services, if billed separately from the subscription, are invoiced upon completion of defined project milestones as agreed in the statement of work. We do not require advance payment in full for multi-year subscriptions and do not charge interest on balances paid within Net 30 terms.	*
62	Describe your accepted payment methods. For credit card/procurement card (pCard), describe any fees associated with these methods.	We accept the following payment methods from Sourcewell participating entities: ACH/electronic funds transfer (preferred), check, and government purchase card (pCard) or procurement credit card. No additional fees or surcharges are assessed for payments made by government purchase card or procurement card. We recognize that many government entities are required to use pCards for purchases below certain thresholds, and we accommodate this without penalty.	
63	Describe available leasing, financing, or as-a-service options, including key features and any third-party providers or financial partners used.	The Sequora Agentic AI platform is offered exclusively as a Software-as-a-Service (SaaS) subscription — which is itself an as-a-service model providing participating entities with full platform access, ongoing updates, and support for an annual subscription fee, without capital expenditure or long-term asset ownership obligations. We do not offer traditional hardware leasing or third-party financing arrangements, as our SaaS delivery model eliminates the need for participating entities to finance or lease physical assets. The annual subscription model with a predictable 3% escalation cap provides a fully operational, budget-plannable alternative to capital procurement that aligns with most government operating budget cycles. We do not use third-party financial partners or leasing companies in connection with our proposed Solutions.	*
64	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.	The following standard transaction documents will be used in connection with the Sourcewell master agreement. Template versions will be uploaded in the document upload section of our proposal: Purchase Order Acknowledgment: Issued by us within three business days of receiving a participating entity's Purchase Order, confirming the order details, subscription tier, pricing, and implementation start date. Statement of Work: A project-specific document executed prior to implementation commencement, defining scope, deliverables, timeline, required participating entity resources, and acceptance criteria. Used for all new deployments and significant scope expansions. Service Level Agreement: Documents our platform availability commitments, support response time SLAs, escalation protocols, and service credit provisions applicable to the participating entity's support tier. Business Associate Agreement: Executed prior to any engagement involving protected health information, in compliance with HIPAA requirements. Available as a standard template upon request. Annual Renewal Notice: Issued 60 days prior to each subscription anniversary date, confirming the renewal term, updated pricing reflecting the 3% annual escalation, and any scope changes requested by the	*

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		participating entity. All transaction documents are supplementary to and consistent with the Sourcewell Master Agreement. In the event of any conflict between our standard transaction documents and the Sourcewell Master Agreement, the Sourcewell Master Agreement governs.	
65	Provide details of any quantity or volume discounts, as well as any rebate programs that are available in addition to the proposed pricing structure discounts.	We offer volume-based pricing discounts structured into our subscription tier model. As participating entities grow their user base or consumption volume, they automatically progress into lower per-unit pricing tiers — reducing the effective per-user monthly rate as scale increases. Specifically, per-user rates step down from $150 per user per month at the Starter tier, to $100 at Professional, to $60 at Enterprise, reflecting the volume discount embedded in our tier structure. For Enterprise+ participating entities representing state-level or multi-department deployments with significant anticipated volume, we offer custom pricing negotiations that may include additional discounts below our published not-to-exceed rates. Participating entities may always negotiate pricing below the master agreement not-to-exceed rates directly with us. We do not currently offer a formal rebate program separate from our tier-based volume pricing structure.	*
66	Describe your method of facilitating non-contracted products or related services and define the associated costs/fees.	Participating entities may request services or capabilities that fall outside the scope of the Sourcewell master agreement — such as highly customized workflow development, bespoke system integrations not covered by our standard connector library, or specialized compliance consulting for unique regulatory frameworks. These non-contracted services are facilitated through a separate statement of work and are priced at our standard professional services rate of $[insert your hourly rate] per hour, or at a fixed project fee agreed in advance with the participating entity. Non-contracted services are clearly distinguished from master agreement subscription services on all invoices. Participating entities are under no obligation to purchase non-contracted services, and their access to the Sequora platform subscription is not contingent on purchasing any additional services.	*
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.	Our submitted pricing covers the full cost of the Sequora platform subscription, included usage allocations, standard integrations, and the support tier associated with each subscription level. The following elements are not included in the base subscription pricing and would represent additional costs if applicable to a participating entity's engagement: Travel expenses: On-site visits for implementation, training, or support are available upon request. Travel, lodging, and per diem costs are billed at actual cost with no markup, in accordance with applicable federal or state per diem rates, and require participating entity pre-approval. Custom development: Bespoke workflow development, custom integration connectors for non-standard systems, or purpose-built AI model fine-tuning beyond our standard catalog are priced separately at our professional services rate. Consumption overages: Usage beyond the included monthly allocations for document processing, agent executions, API calls, and storage is billed at the consumption rates disclosed in our pricing schedule. Mission-Critical support add-on: Available for Starter and Professional tier	*

		subscribers at $3,000 per environment per year where not already included in the subscription tier. There are no freight, shipping, or physical delivery charges associated with our SaaS platform.	
68	Describe and define the costs/fees associated with your freight, shipping, and delivery program(s) in the contiguous United States.	Not applicable. The Sequora Agentic AI platform is delivered exclusively as a SaaS solution. There are no physical goods, hardware, or materials shipped to participating entities as part of our proposed Solutions. Accordingly, there are no freight, shipping, or physical delivery charges for participating entities in the contiguous United States.	*
69	Describe and define the costs/fees associated with your freight, shipping, and delivery program(s) for Alaska, Hawaii, Canada, or any offshore delivery.	Not applicable. The Sequora Agentic AI platform is delivered exclusively as a SaaS solution accessible via internet connection. There are no physical goods, hardware, or materials shipped to participating entities regardless of their location. Participating entities in Alaska, Hawaii, Canada, US territories, or any other location access the platform identically to contiguous US entities — through a browser-based interface and API — with no freight, shipping, or delivery charges of any kind.	*
70	Describe any unique distribution, delivery, or deployment methods offered in your proposal.	Our SaaS delivery model on AWS is itself our unique deployment method, and it carries several advantages that distinguish our approach from traditional enterprise software delivery: Zero-Infrastructure Deployment: Participating entities access the full Sequora Agentic AI platform through a standard web browser and API — no servers, compute hardware, software installations, or infrastructure procurement required. A new participating entity can be fully onboarded and operating in production within weeks, not months, without any capital expenditure. Elastic Scaling on Demand: AWS infrastructure automatically scales to meet each participating entity's workload in real time. A small municipality and a large state agency access the same platform with the same performance characteristics — the infrastructure scales to fit them, not the other way around. Continuous Delivery of Updates: Because Sequora is SaaS, platform improvements, security patches, and new AI capabilities are delivered automatically to all participating entities through our continuous deployment pipeline. There are no version upgrade projects, no migration efforts, and no scheduled downtime for major releases. Participating entities are always on the current version. Canadian Data Residency on Request: For Canadian participating entities, we offer a deployment configuration that routes all data storage and AI inference processing through AWS Canadian regions (ca-central-1), providing data residency within Canada without any change to the user experience or platform capabilities.	*
71	Describe any self-audit processes or programs that you will employ to verify that Sourcewell participating entities have obtained Agreement pricing and to verify compliance with	We will employ the following self-audit processes to verify that all transactions under the Sourcewell master agreement are conducted at or below the not-to-exceed pricing and in compliance with all Agreement terms: Transaction Logging: Every purchase order received from a participating entity referencing the Sourcewell master agreement is logged in our internal contract management system at time of receipt, capturing the entity name, entity type, Agreement reference number, solution	*

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	the resulting Agreement.	purchased, and price charged. This log serves as the primary audit record for all Sourcewell transactions. Price Verification at Order Entry: Our order entry process includes a mandatory pricing verification step in which the account manager responsible for the transaction confirms that the quoted price does not exceed the applicable not-to-exceed rate for the subscribed tier as listed in the master agreement pricing schedule. Orders cannot be processed without this confirmation step being completed and documented. Quarterly Transaction Review: Prior to each quarterly report and administrative fee remittance to Sourcewell, our designated Sourcewell program manager conducts a reconciliation of all transactions recorded in the contract management system against invoices issued and payments received. Any discrepancies are identified, investigated, and corrected before the quarterly report is submitted. Annual Internal Audit: Once per calendar year, we will conduct a comprehensive internal audit of all Sourcewell transactions, verifying that each transaction was placed by an eligible participating entity, priced at or below the master agreement not-to-exceed rate, correctly classified by entity type, and accurately reported to Sourcewell in the applicable quarterly period. Participating Entity Verification: Upon receiving a purchase order referencing the Sourcewell master agreement, we verify that the purchasing entity appears in the Sourcewell participating entity database before processing the order. Orders from non-participating entities are not processed under the master agreement pricing. Corrective Action: If our self-audit identifies any instance in which a participating entity was charged above the master agreement not-to-exceed rate, we will issue a corrective credit to the affected entity within 30 days of identification and report the correction to Sourcewell in the next quarterly submission.	
72	Provide a list of internal metrics that will be tracked to measure the success of a resulting Agreement.	We will track the following internal metrics on a quarterly basis to measure the performance, growth, and quality of our Sourcewell master agreement: Transaction Volume: Total number of purchase orders received from Sourcewell participating entities per quarter and cumulative since award, broken down by entity type (local government, state agency, K–12, higher education, nonprofit, tribal). Total Sales Volume: Total dollar value of transactions completed under the master agreement per quarter and cumulative, reported in both USD and CAD as applicable. Geographic Coverage: Number of US states and Canadian provinces in which sales have been made under the agreement, tracked quarterly to measure expansion of our participating entity footprint. New Entity Activation Rate: Number of net-new participating entities accessing the Sequora platform through the Sourcewell agreement per quarter, distinguishing first-time Sourcewell buyers from entities that may have previously engaged us through another vehicle. Subscription Renewal Rate: Percentage of participating entity subscriptions renewed at each annual anniversary, as a measure of client satisfaction and platform value delivered. Platform Adoption Metrics: Average number of active AI workflows, users, and data integrations per participating entity deployment, tracked	*

		to measure depth of platform utilization. Support SLA Compliance: Percentage of support tickets resolved within the committed SLA timeframe by support tier, tracked monthly and reviewed quarterly. Administrative Fee Accuracy: Variance between reported transaction volume and actual invoiced revenue, verified through our quarterly reconciliation process, with a target of zero variance. Participating Entity Satisfaction: Results of annual client satisfaction surveys conducted with all active Sourcewell participating entity accounts, measuring overall satisfaction, platform value, and likelihood to recommend.	
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 an Administration Fee of 2% of all completed transactions to Sourcewell participating entities utilizing the resulting master agreement, calculated as a percentage of the total invoice value of each completed transaction within the preceding Reporting Period as defined in the Sourcewell Master Agreement. The Administration Fee will be remitted to Sourcewell quarterly, accompanied by a transaction report in the format specified by Sourcewell, detailing all sales made to participating entities during the applicable reporting period. The Administration Fee is paid exclusively by us to Sourcewell and will not be separately assessed, itemized, or recovered from participating entities in any form — the not-to-exceed prices submitted with this proposal are the all-in prices to participating entities, with the Administration Fee absorbed within our pricing structure. We confirm our understanding that the Administration Fee applies to all transactions under the master agreement regardless of how the participating entity initiates the purchase, and that we are obligated to report and remit fees on all such transactions including those initiated through our website, direct outreach, or any other channel where the Sourcewell master agreement is referenced as the procurement vehicle.	*

Table 6B: Pricing Model

Select one or more pricing option(s) below and provide a description of each chosen model, as appropriate to the Proposer's Primary Lot and commercial model. Proposers may use more than one pricing model. Refer to RFP Section III for pricing structure requirements and Section III.B for Pricing Narrative requirements. ***Proposers must submit a separate price sheet and a Pricing Narrative, regardless of the pricing model selected.***

#	Model Options	Model Requirements	Supplier's Model Selection *	Model Description *	
74	Option 1: Line-Item Pricing	If proposed pricing is Line-Item Pricing, Proposer must submit:	○ Yes ◉ No	Not applicable. We do not propose line-item pricing as our primary pricing model. All Solutions are delivered under a subscription and consumption-based model as described in Line Item 76.	*

		A. the list/MSRP for each line item; B. the ”Master Agreement Price;" and C. if proposed pricing includes a percentage discount, provide that discount and describe its application.			
75	Option 2: Percentage Discount from Catalog or Published Rate Card	If proposed pricing is percentage discount off a catalog or category of offerings, Proposer must submit: A. a percentage discount(s); and B. either (1) an active URL to a current published online catalog, OR (2) a complete price file with current pricing.	○ Yes ◉ No	Not applicable. We do not propose pricing as a percentage discount from a published catalog or rate card. All Solutions are priced directly under the subscription and consumption-based model described in Line Item 76.	*
76	Option 3: Subscription and Consumption-Based Pricing	If proposed pricing is subscription or consumption based pricing, Proposer must submit: A. the pricing unit (e.g., per user/month, per API call, etc.); B. not-to-exceed rate per unit; and C. if proposed pricing includes a percentage discount, provide that discount and describe its application. Note: Where consumption pricing is tiered, all tiers must be disclosed.	◉ Yes ○ No	We propose a subscription and consumption-based pricing model for the Sequora Agentic AI platform, structured as follows: A. Pricing Units: Platform Subscription — priced per environment per year, tiered by user count: Starter Tier (1–50 users): $1,800 per year ($150 per user per month base rate) Professional Tier (51–250 users): $6,000 per year ($100 per user per month base rate) Enterprise Tier (251–1,000 users): $15,000 per year ($60 per user per month base rate) Enterprise+ Tier (1,000+ users / multi-department): Custom quote based on scope Consumption-Based Units (usage beyond included tier allocations): Document processing: per document processed Agent task executions: per 1,000 executions API calls: per 10,000 calls Additional storage: per GB per month Additional user licenses: per user per month B. Not-to-Exceed Rates per Unit: Document processing: $0.08 per document (NTE); $0.06 per document at >10,000/month; $0.04 per document at	*

				>50,000/month Agent task executions: $1.50 per 1,000 executions (NTE); $1.00 per 1,000 at >100,000/month API calls: $0.50 per 10,000 calls (NTE); $0.35 per 10,000 at >1,000,000/month Additional storage: $0.023 per GB per month (NTE) Additional user license — Professional tier: $45 per user per month (NTE) Additional user license — Enterprise tier: $35 per user per month (NTE) Mission-Critical support add-on: $3,000 per environment per year (NTE) C. Annual Escalation: All subscription and consumption rates are subject to a fixed annual escalation of 3% from the base year rate, applied at each annual contract anniversary. The escalation is capped at 3% — it will not exceed this amount regardless of market conditions. All tiers and consumption rates escalate uniformly at the same 3% rate. Example: Starter tier base rate of $1,800 in Year 1 becomes $1,854 in Year 2, $1,910 in Year 3, and so on throughout the master agreement term. Discount Application: Volume discounts are embedded in the tier structure — as user counts or consumption volumes increase, lower per-unit rates apply automatically without requiring a separate discount negotiation. Participating entities may additionally negotiate pricing below the published not-to-exceed rates based on their specific volume, multi-year commitment, or program requirements. A complete price sheet with all tiers, consumption rates, and Year 1 through Year 5 escalated rates is submitted as a separate upload in Step 2 of this proposal.	
77	Option 4: Managed Services and Recurring Fees	If proposed pricing is managed services and recurring fees, Proposer must submit: A. billing basis; B. scope of included services; C. any assumptions, limitations, tiers, minimums, or other conditions affecting the proposed pricing (i.e. pricing per month, per environment, per model, per user, etc.); and D. if proposed pricing includes a percentage	(•) Yes ( ) No	Select Yes for Line Item 77 (Managed Services and Recurring Fees, since your annual subscription is effectively a recurring managed service), and No for Line Items 78, 79, and 80. Here are the descriptions: Line Item 77 — Option 4: Managed Services and Recurring Fees Selection: Yes Model Description: Our annual subscription model constitutes a managed service with recurring fees, as the Sequora platform is fully hosted, operated, maintained, and supported by our team on behalf of participating entities. We include this option in addition to Option 3 to fully reflect the managed nature of our SaaS delivery model.	*

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		discount, provide that discount and describe its application.		A. Billing Basis: Annual, invoiced at the start of each subscription year. Consumption overages are invoiced monthly in arrears based on actual usage beyond included tier allocations. B. Scope of Included Services: Each annual subscription includes the following managed services at no additional charge beyond the subscription fee: platform hosting and infrastructure management on AWS; continuous security monitoring and patching; model performance monitoring and drift detection; platform updates and new feature releases; governance console access and audit log management; standard data connector maintenance; and the support tier associated with the subscribed plan (Standard, Enhanced, or Mission-Critical). C. Assumptions, Limitations, Tiers, and Conditions: Subscription pricing is per environment per year, tiered by user count as defined in Line Item 76 Each subscription environment is scoped to a single participating entity's deployment Included monthly usage allocations (documents processed, agent executions, API calls, storage) are defined per tier; overages are billed at consumption rates disclosed in Line Item 76 Minimum subscription term is one year, with annual renewal at the 3% escalated rate No minimum commitment beyond the first annual subscription year is required Subscriptions may be upgraded to a higher tier at any point during the subscription year, with pricing prorated for the remainder of the term Subscriptions may not be downgraded mid-year but may be adjusted at the annual renewal date D. Percentage Discount: Volume discounts are embedded in the tier structure as described in Line Item 76. No separate percentage discount applies to the managed service fees beyond the tier-based volume pricing already disclosed.	
78	Option 5: Time-and-Materials Rates	If proposed pricing is based on time and material rates, Proposer must submit: A. not-to-exceed hourly or daily rates by role, labor category, or service type; and C. if proposed pricing includes a percentage discount, provide that discount and describe its	○ Yes ◉ No	Not applicable as a primary pricing model. Where non-contracted professional services are required beyond the scope of the subscription (such as custom workflow development or specialized integrations), these are available at our standard professional services rate as disclosed in Line Item 66. Our primary proposed pricing model is subscription and consumption-based as described in Line Items 76 and 77.	*

		application.			
79	Option 6: Outcome- or Transaction -Based Pricing	If proposed pricing is outcome- or transaction-based, Proposer must submit: A. unit of outcome; B. not-to-exceed rate per unit; C. any volume thresholds that affect per-unit pricing; and D. if proposed pricing includes a percentage discount, provide that discount and describe its application.	○ Yes ◉ No	Not applicable. We do not propose outcome- or transaction-based pricing as a standalone model. However, our consumption-based pricing component (agent executions priced per 1,000 tasks, documents priced per unit processed) shares characteristics with transaction-based pricing and is fully disclosed in Line Item 76.	*
80	Option 7: Other	If proposed pricing does not fit within the models above, Proposer must fully describe their pricing model.	○ Yes ◉ No	Not applicable. Our pricing is fully described under Option 3 (Subscription and Consumption-Based, Line Item 76) and Option 4 (Managed Services and Recurring Fees, Line Item 77). No additional pricing model is proposed.	*

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Table 6C: Pricing Offered

#	The Pricing for this Proposal is: *	Specify the basis for the pricing offered, include unique circumstances or justifications	
81	As good as or better than pricing typically offered through our existing cooperative contracts, state contracts, or agencies.	The pricing offered under this Sourcewell master agreement is better than our best publicly available pricing for the following reasons: The Sourcewell cooperative purchasing model aggregates demand across 50,000+ participating entities in the United States and Canada, representing a combined anticipated transaction volume of $150 million annually for Lot 1 alone. This scale of collective purchasing power justifies pricing below what any individual participating entity — regardless of size — could negotiate independently through a standalone procurement. Our submitted not-to-exceed rates reflect this volume advantage and are set below the rates we would offer to a single organization procuring the Sequora platform outside of a cooperative agreement. Additionally, the Sourcewell master agreement reduces our cost of sale significantly. The cooperative procurement vehicle eliminates the need for us to respond to individual competitive solicitations from each participating entity, reducing our business development, proposal preparation, and legal review costs per transaction. We pass these savings directly to participating entities through our Sourcewell pricing, resulting in rates that are more favorable than our standard commercial pricing for equivalent subscription tiers and consumption volumes. Our annual 3% escalation cap further strengthens the value of this pricing over the ten-year master agreement term — participating entities are protected from market-rate price increases that would otherwise apply to renewals negotiated outside of a cooperative agreement structure. The combination of below-market base rates, embedded volume discounts through our tier structure, and a capped escalation rate represents pricing that is demonstrably better than what participating entities could obtain through any publicly available channel.	*

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

Indicate below if the listed Lots and Lot subcategories are offered within your proposal. Provide additional comments in the text box provided, as necessary.

#	Lot Description	Lot Subcategory	Offering? *	Comment *	
82	Lot 1: AI Products and Platforms If the proposer's primary deliverable is a technology product, such as an AI platform, infrastructure system, or software solution that		(•) Yes ( ) No	IT Automation offers an enterprise-grade Artificial Intelligence platform designed for government, education, healthcare, public safety, and regulated industries. The platform provides AI-powered automation, document intelligence, workflow orchestration, enterprise knowledge management, conversational AI, decision support, analytics, and responsible AI governance through SaaS, private cloud, hybrid, and on-premises deployment models.	*

	Participating Entities procure and operate, the proposer should respond under Lot 1: AI Products and Platforms.				
83		AI Platforms and Infrastructure	(•) Yes ( ) No	The proposed Enterprise AI Platform provides scalable AI infrastructure supporting enterprise search, retrieval-augmented generation (RAG), document intelligence, workflow automation, knowledge management, AI assistants, analytics, and integration with enterprise systems. The platform supports cloud-native, hybrid, and private deployment architectures with enterprise security and governance controls.	*
84		Intelligent Automation Platforms and Agentic AI	(•) Yes ( ) No	The platform includes intelligent automation and agentic AI capabilities that automate business processes, orchestrate workflows, manage task execution, analyze documents, generate insights, support decision-making, and enable AI-powered virtual assistants. Agent-based workflows can be configured to support constituent services, case management, document processing, operational support, and enterprise knowledge retrieval.	*
85	Lot 2: AI Professional Services If the proposer's primary deliverable is human expertise, including advisory, consulting, implementation, or managed services, the proposer should respond under Lot 2: AI Professional Services.		( ) Yes (•) No	The primary deliverable offered under this proposal is an enterprise AI technology platform. While implementation, configuration, training, and support services are available as complementary services, the principal offering is a software platform rather than standalone professional services.	*
86		AI Strategy, Governance, and Enterprise Transformation	(•) Yes ( ) No	The platform includes governance, compliance, auditability, security controls, responsible AI policies, human-in-the-loop workflows, model oversight, and operational governance capabilities that support enterprise AI adoption and organizational transformation initiatives.	*
87		AI-Enabled Managed Services	(•) Yes ( ) No	Managed support services are available to assist participating entities with platform administration, monitoring, maintenance, updates, security management, user support, model optimization, and operational performance management as part of ongoing platform operations.	*
88		AI Software Development and Engineering	(•) Yes ( ) No	The platform supports custom AI solution development, workflow engineering, system integration, API development, enterprise automation, conversational AI deployment, document intelligence implementation, and	*

				integration with existing enterprise applications and data sources.	
89	Lot 3: Integrated AI Delivery If (a) the proposer delivers both AI technology and AI professional services as a unified commercial offering, (b) serves as the single accountable party for both under one contract, and (c) maintains primary responsibility for the design, integration, performance, and delivery of the integrated AI solution, and remains fully accountable for outcomes, even when third-party components are used, the proposer should respond under Lot 3: Integrated AI Delivery.		◉ Yes ○ No	The proposed Enterprise AI Platform can be delivered as a fully integrated, turnkey solution under a single contract with unified prime accountability for design, implementation, integration, training, ongoing support, and measurable outcomes. While this proposal leads with Lot 1 - AI Products and Platforms, as the primary offering, demonstrated integrated delivery capability is evidenced through production engagements such as the Town of Apex Civic Engagement Platform, where full prime accountability was held for both the technology platform and all associated delivery services. Participating Entities seeking a single accountable party for end-to-end AI solution delivery from platform deployment through operational performance may engage under Lot 3 as a unified integrated offering.	*

Table 7B: Responsible AI & Governance (175 Points)

All questions apply to all Lots. Proposers should tailor responses to reflect their role as a product/platform provider, services provider, or integrated delivery provider.

#	Question	Response *	
90	Describe your approach to data ownership, usage, and retention. Include: • Data sources and ingestion methods, including whether data is provided by the Participating Entity, third parties, or generated within the system; • Whether Participating Entity data or outputs are	Line Item 90 — Data Ownership, Usage, and Retention: Our approach to data ownership, usage, and retention is built on a foundational principle: participating entity data belongs exclusively to the participating entity. We are a platform operator, not a data owner, and every policy described below reflects that position. Data Sources and Ingestion Methods: All data processed by the Sequora platform originates from the participating entity or their authorized systems — we do not introduce third-party data sources into a participating entity's environment without their explicit knowledge and authorization. Data enters the platform through the following methods: direct API integration with the participating entity's existing enterprise systems; secure file transfer (SFTP) for batch document ingestion; browser-based uploads by authorized entity users through the platform interface; and webhook or event-driven integration for real-time data flows from connected systems. In all cases, the participating entity controls what data is connected to the platform, which systems are integrated, and what	*

	used for model training, improvement, or fine-tuning (default vs opt-in and conditions); • Data retention and deletion practices; • Ownership of outputs; and • If applicable, how you advise clients on establishing these policies.	data categories are accessible to AI workflows. We do not scrape, harvest, or independently collect participating entity data from any source outside of the explicitly configured integrations. Whether Participating Entity Data or Outputs Are Used for Model Training: Participating entity data and AI-generated outputs are never used for model training, improvement, or fine-tuning without explicit, affirmative opt-in consent from the participating entity. Our default position is that all participating entity data processed through the Sequora platform is used solely to deliver the AI services requested by that entity, and for no other purpose. We do not use one participating entity's data to improve model performance for another entity. We do not aggregate participating entity data across clients for training purposes. If a participating entity wishes to opt into a model improvement program — for example, to contribute anonymized workflow data toward fine-tuning a domain-specific government model — this is available as an explicit, separately documented opt-in arrangement with clearly defined terms, data categories, anonymization standards, and the right to withdraw consent at any time. Participation in any such program has no bearing on the participating entity's subscription pricing, service levels, or access to platform features. Data Retention and Deletion Practices: Data retained within the Sequora platform is governed by the participating entity's configured retention policies, which are set during Phase 1 onboarding and can be modified by the entity's administrators at any time. Our default retention settings are as follows: AI inference inputs and outputs are retained for 90 days to support audit review and quality assurance, after which they are automatically purged unless the participating entity configures a longer retention period. Audit logs are retained for a minimum of 12 months by default, with configurable extension to meet the participating entity's records retention obligations. Knowledge base content and workflow configurations are retained for the life of the active subscription. Upon subscription termination, all participating entity data is retained in an exportable state for 60 days following the termination date, after which it is securely deleted from our systems in accordance with NIST 800-88 media sanitization guidelines. Participating entities may request accelerated deletion at any time, which we will complete within 30 days of a written request. Deletion is confirmed in writing to the participating entity upon completion. Ownership of Outputs: All AI-generated outputs produced by the Sequora platform in response to participating entity data and workflows are owned exclusively by the participating entity. We assert no intellectual property rights, ownership claims, or usage rights over any outputs generated on behalf of a participating entity. This includes documents drafted, data extracted, decisions supported, reports generated, and any other content produced by the platform in the course of delivering services. Our ownership interest is limited to the underlying platform software, models, and proprietary technology — none of which is transferred to participating entities, but none of which grants us any claim over the outputs those components produce on the participating entity's behalf. How We Advise Clients on Establishing These Policies: During Phase 1 onboarding, we conduct a dedicated data governance session with each participating entity's designated data steward, compliance officer, or legal contact. In this session we review the entity's applicable regulatory obligations (HIPAA, FERPA, state records retention laws, public	

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		records requirements), map those obligations to the platform's configurable retention and access controls, and produce a documented data governance configuration record that captures the agreed settings and the regulatory basis for each decision. For participating entities that do not have established AI data governance policies, we provide a template AI Data Governance Policy framework — covering data classification, retention schedules, access controls, model usage restrictions, and incident response — that the entity can adopt, adapt, and present to their oversight bodies as evidence of responsible AI governance. We recommend that participating entities review and reaffirm their data governance configuration annually, and we include this review as a standing agenda item in our annual capability roadmap sessions.	
91	Describe how your solution or services support AI and data sovereignty. Include: • Where data is stored, processed, and transmitted; • Whether any data, metadata, or model interactions are subject to foreign jurisdiction or legal access (e.g., through ownership, hosting, or subprocessors); • Ability to ensure that AI models and inference processing remain within defined geographic or jurisdictional boundaries; • Ability to restrict data to specific jurisdictions; • Support for on-prem, private cloud, or restricted environments; and • If applicable, how you enable clients to meet these requirements.	Line Item 91 — AI and Data Sovereignty: Data sovereignty is a foundational design requirement for government AI deployments, not an optional configuration. Our approach ensures that participating entities have clear, enforceable, and auditable control over where their data lives, where it is processed, and who can legally access it. Where Data is Stored, Processed, and Transmitted: All data storage, AI inference processing, and data transmission for US participating entities occurs exclusively within AWS US regions (us-east-1 and us-east-2 by default, with us-west-2 available upon request). No participating entity data traverses international network boundaries during normal platform operation. Data at rest is encrypted using AES-256 within AWS S3 and RDS storage services. Data in transit is encrypted using TLS 1.2 minimum across all API connections, browser sessions, and system integrations. AI model inference — including the submission of participating entity data to AI model endpoints — is processed within the same AWS regional boundary as the participating entity's data storage environment, ensuring that data does not leave the authorized geographic region at any point in the inference pipeline. For Canadian participating entities, all data storage, processing, and transmission occurs within AWS Canadian regions (ca-central-1) upon request, ensuring compliance with PIPEDA and applicable provincial privacy frameworks including Quebec Law 25. Canadian data does not transit through or reside in US regions under this configuration. Foreign Jurisdiction and Legal Access Risks: We have assessed our organizational structure, hosting arrangements, and subprocessor relationships with specific attention to foreign jurisdiction exposure. Our primary infrastructure provider is Amazon Web Services, a US-domiciled company headquartered in Seattle, Washington, operating under US law. AWS is not subject to the data access provisions of foreign governments through its US operational structure for data stored and processed in US regions. We are a US LLC incorporated in North Carolina, with no foreign parent company, no foreign ownership interests, and no contractual relationships with subprocessors domiciled in jurisdictions whose laws could compel access to participating entity data without US legal process. We do not use subprocessors located outside the United States for any function involving participating entity data. Our AI model providers — accessed through Amazon Bedrock within the AWS environment — are US-domiciled services operating under US law. We do not route participating entity data through AI model APIs operated by entities subject to foreign data access laws such as China's National Intelligence Law, Russia's data	*

		localization requirements, or similar foreign legal frameworks that could expose participating entity data to compelled government access outside of US judicial process. Ensuring AI Models and Inference Remain Within Geographic Boundaries: Our inference architecture is configured so that all model inference calls for a participating entity's environment are routed exclusively to model endpoints operating within the AWS region designated for that entity's deployment. We enforce this boundary at the platform configuration level — inference requests cannot be routed to out-of-region endpoints without an explicit administrative reconfiguration requiring our engineering team's involvement. For participating entities with specific inference boundary requirements — such as state agencies operating under data residency statutes that apply to all data processing, not just storage — we document the inference routing configuration as part of the compliance record established during Phase 1 onboarding, providing auditable evidence that inference processing remained within the authorized boundary throughout the engagement. Ability to Restrict Data to Specific Jurisdictions: Participating entities can request jurisdiction-specific data residency configurations at the time of onboarding. Supported configurations include US-only (all data stored and processed within AWS US regions), Canada-only (all data stored and processed within AWS ca-central-1), and state-specific preferences where a participating entity's legal counsel determines that a particular AWS US region best satisfies their jurisdictional requirements. These configurations are enforced at the infrastructure level through AWS region-locking controls, not merely as policy commitments. Data residency configuration is documented in the entity's data governance record and can be verified by the entity's compliance staff through AWS CloudTrail logs available upon request. We do not offer data residency configurations outside of AWS US and Canadian regions at this time. Support for On-Premises, Private Cloud, or Restricted Environments: Our current primary delivery model is SaaS on AWS. For participating entities with requirements that cannot be met within an AWS-hosted environment — such as classified environments, air-gapped networks, or agencies under state laws mandating on-premise data processing — we offer the following options: Private cloud deployment: We can deploy a dedicated, single-tenant instance of the Sequora platform within a participating entity's own AWS account or approved cloud environment, providing physical data isolation with the entity maintaining direct control over their cloud infrastructure configuration and access policies. On-premise deployment consultation: For entities with strict on-premise requirements, we assess feasibility on a case-by-case basis during the pre-sales discovery process. On-premise deployments require the participating entity to provide qualifying compute infrastructure and involve a custom scoping and pricing process outside our standard subscription tiers. We will not commit to on-premise delivery timelines or pricing without a completed technical discovery. Restricted environment advisory: For participating entities operating within restricted network environments — such as state government networks with outbound internet restrictions or federal enclave requirements — we provide a technical integration assessment during Phase 1 to identify the specific connectivity requirements for SaaS access and advise on approved network configurations, proxy settings, and allowlist requirements to enable platform	

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		access within the entity's security perimeter. How We Enable Clients to Meet Sovereignty Requirements: We integrate data sovereignty planning into our standard onboarding process rather than treating it as a specialized add-on. During Phase 1 discovery, we conduct a dedicated sovereignty and residency assessment with each participating entity covering: the applicable federal and state data residency statutes, the entity's internal data classification policies, the specific data categories that will be processed by the platform, the inference routing configuration required to satisfy residency obligations, and the audit evidence we will provide to support the entity's own compliance reporting. The outcomes of this assessment are documented in a Data Sovereignty Configuration Record — a plain-language document describing where the entity's data is stored, where it is processed, who can access it, under what legal framework, and what technical controls enforce those boundaries. This document is designed to be presented directly to the entity's legal counsel, CISO, or oversight body as evidence of sovereignty compliance, without requiring those audiences to interpret technical infrastructure documentation themselves.	
92	Describe your organization's Responsible AI governance framework. Include: • Policies governing AI development, deployment, or advisory services; • Roles and oversight (e.g., ethics boards, risk committees); • How governance is enforced; and • How governance policies align with applicable legal, regulatory, and sector-specific requirements, including those relevant to highly regulated industries.	Line Item — Responsible AI Governance Framework: Our Responsible AI governance framework is not a document that lives in a policy folder — it is an operational structure that governs every decision we make about how the Sequora platform is built, configured, deployed, and monitored on behalf of participating entities. We have organized our governance around six enforceable principles, supported by defined roles, embedded platform controls, and explicit alignment to the regulatory frameworks that govern our government and education clients. Policies Governing AI Development, Deployment, and Advisory Services: Our Responsible AI Policy establishes binding organizational commitments across three domains: Development Policy: All AI models and agentic workflows introduced into the Sequora platform undergo a structured pre-deployment review covering intended use case, training data provenance, demographic bias testing, output accuracy benchmarking, and explainability assessment before being made available to participating entities. Models that fail bias testing thresholds or cannot produce human-interpretable output rationales are not released into production regardless of their accuracy performance. This policy applies to models we develop internally, models accessed through third-party APIs such as Amazon Bedrock, and any domain-specific fine-tuned models developed in collaboration with participating entities. Deployment Policy: Every Sequora deployment operates under a Deployment Governance Configuration — a documented set of platform settings defining which AI capabilities are active, what confidence thresholds trigger human review, which data categories are accessible to AI workflows, what output categories are permitted, and what audit logging is enabled. This configuration is established during Phase 1 onboarding, reviewed and approved by the participating entity's designated authority, and stored as an auditable record. No AI capability is activated in a participating entity's production environment without explicit configuration approval. Changes to the deployment configuration require documented authorization and are logged in the audit trail. Advisory Policy: When we advise participating entities on AI governance, data	*

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		classification, or responsible AI implementation — as part of our onboarding process or ongoing account management — we apply the same responsible AI standards to our advisory outputs that we apply to our platform. We do not advise participating entities to adopt AI configurations that we would not ourselves operate under. We proactively flag governance risks we observe in a participating entity's operational environment, even when those risks fall outside our direct platform scope. Roles and Oversight: Responsible AI Officer: We have designated a Responsible AI Officer within our leadership team who holds organizational accountability for maintaining our Responsible AI Policy, reviewing pre-deployment model assessments, investigating AI-related incidents or complaints, and advising our engineering and account management teams on emerging governance requirements. The Responsible AI Officer reviews all new model introductions and any significant changes to platform AI capabilities before they are released. Engineering Governance Review: Our engineering team operates under a mandatory governance checkpoint in our software development lifecycle. Before any AI capability change is promoted from staging to production, it must pass a governance review confirming that bias testing has been completed, audit logging is functioning, human review escalation pathways are operational, and the change does not introduce new data access beyond what is authorized in affected participating entities' Deployment Governance Configurations. Account Management Responsibility: Each participating entity's assigned account manager serves as the day-to-day governance liaison, responsible for monitoring platform behavior reports, communicating governance updates to the entity, facilitating the annual governance configuration review, and escalating any entity-reported governance concerns to the Responsible AI Officer within one business day. Client Governance Authority: We recognize that participating entities — not us — hold ultimate governance authority over AI-assisted decisions within their organizations. Our platform is designed to support, not supplant, that authority. Every participating entity's designated administrator has full access to the Governance Console, can modify governance configurations within their environment at any time, and can suspend or disable any AI workflow without our involvement. How Governance is Enforced: Our governance framework is enforced through a combination of platform-level technical controls, operational processes, and documented accountability structures — not merely through policy statements: Technical enforcement: Human-in-the-loop review queues are enforced at the platform level for all workflow categories designated as high-stakes by the participating entity or by our default governance configuration. Confidence thresholds below which AI outputs are automatically routed to human review cannot be disabled by end users — only by authorized administrators through a documented configuration change. Audit logging is non-optional and cannot be disabled by any user, including administrators. PII masking and data boundary controls are enforced at the infrastructure level, not the application level, preventing circumvention through application-layer configurations. Operational enforcement: Our quarterly internal audit process reviews a sample of AI-assisted decisions across active deployments, verifying that human review is functioning as configured, that output distributions are consistent with expected behavior, and that no anomalous patterns suggest	

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		model drift, adversarial manipulation, or governance control bypass. Findings are documented and remediated within defined timeframes. Contractual enforcement: Our master agreement terms and statement of work templates include explicit responsible AI commitments — covering audit log availability, human review requirements, data boundary controls, and incident notification obligations — that are enforceable by participating entities and by Sourcewell under the master agreement structure. Incident response: Any AI-related incident — including unexpected output behavior, potential bias manifestation, data boundary breach, or adversarial attack attempt — triggers our documented AI Incident Response Protocol. The Responsible AI Officer is notified within one hour of incident detection. Affected participating entities are notified within 24 hours. Root cause analysis is completed within 72 hours for critical incidents and 14 days for standard incidents, with findings and remediation actions documented and provided to the participating entity. Alignment with Legal, Regulatory, and Sector-Specific Requirements: Our governance framework is explicitly mapped to the regulatory environments in which our participating entities operate: NIST AI Risk Management Framework (AI RMF): Our governance structure aligns to the NIST AI RMF's four core functions — Govern, Map, Measure, and Manage. Our Responsible AI Policy, Deployment Governance Configuration, bias testing protocol, and incident response process correspond directly to the NIST AI RMF's prescribed organizational practices for trustworthy AI deployment. HIPAA: For health and human services participating entities, our governance framework enforces data minimization, access controls, audit logging, and breach notification obligations consistent with HIPAA's Security Rule and Privacy Rule requirements as they apply to AI-assisted processing of protected health information. FERPA: For education participating entities, our governance framework restricts AI access to student records to authorized purposes, enforces disclosure controls on AI-generated outputs containing student data, and maintains audit logs sufficient to support FERPA compliance reporting and parent or student access requests. CJIS Security Policy: For public safety participating entities, our governance framework applies the personnel screening, access control, audit logging, and data handling requirements of the FBI CJIS Security Policy to all AI-assisted processing of criminal justice information. Emerging State AI Governance Laws: We actively monitor emerging state-level AI governance legislation — including transparency requirements, algorithmic accountability laws, and automated decision-making restrictions — and update our Deployment Governance Configuration defaults and our Responsible AI Policy as new legal obligations come into effect in jurisdictions where our participating entities operate. Participating entities are notified of legally material governance updates within 30 days of our determination that an update is required. Executive Order and Federal Guidance Alignment: Our governance framework incorporates principles from federal AI governance guidance including the Office of Management and Budget's memoranda on responsible AI in federal agencies and the National Institute of Standards and Technology's guidance on AI trustworthiness. While these frameworks do not directly bind our organization as a vendor, aligning to them ensures that our platform governance posture is consistent with the standards our federal and	

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		state government participating entities are themselves required to meet.	
93	Describe how you identify, assess, and mitigate risks associated with AI. Include: • Bias detection and mitigation; • Ongoing monitoring in production or client environments; • Incident response and escalation processes; and • Consideration of regulatory, legal, or compliance risks in addition to technical risks.	Our approach to AI risk management treats risk identification, assessment, mitigation, and monitoring as continuous operational disciplines across the full AI lifecycle. We assess risks before deployment, monitor risks during production use, and apply documented remediation and lessons learned after incidents. Our risk management framework addresses technical, operational, legal, regulatory, compliance, and third-party dependency risks. Bias Detection and Mitigation Before any AI model or agentic workflow is activated in a Participating Entity's production environment, we conduct a structured bias and fairness assessment based on the intended use case, available data, and potential impact on individuals or protected groups. This assessment may evaluate outputs across relevant dimensions such as race, gender, age, geography, language, socioeconomic indicators, or other applicable categories where lawful, appropriate, and supported by available data. For higher-risk use cases, such as workflows involving benefits, education records, public services, health information, enforcement, eligibility, or other consequential outcomes, we apply a more detailed review process. Lower-risk use cases, such as document formatting, routing, summarization, or internal administrative support, are reviewed under a proportionate risk-based process. Where bias or disparate output patterns are identified, we apply mitigation techniques such as prompt refinement, training data review, output filtering, confidence thresholds, human review requirements, workflow restrictions, or model replacement. Workflows that present unresolved bias risk are not promoted to production until the risk is addressed or the use case is restricted to an acceptable operating context. Bias monitoring continues after deployment. Sequora can monitor output patterns, confidence scores, review rates, and exception trends over time to identify potential emerging bias, data drift, or model degradation. Significant anomalies are flagged for engineering review and, where applicable, communicated to the Participating Entity's designated administrator. Ongoing Production Monitoring Production AI workflows are continuously monitored for accuracy indicators, confidence score distribution, response latency, error rates, workflow completion rates, and human review queue activity. Automated alerts notify our engineering team when defined thresholds are exceeded. We monitor data drift by comparing the statistical characteristics of incoming data against the baseline established during deployment. When input data patterns materially change, the affected workflow is flagged for review to prevent model performance degradation before it impacts operations. Human review queues are also monitored. A sudden increase in human review volume may indicate declining model confidence, changed input	*

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		patterns, workflow misconfiguration, or emerging operational risk. Sustained high review rates trigger further assessment and may result in reconfiguration, additional training, or model tuning recommendations. Sequora also includes controls to detect potential adversarial inputs, including prompt injection attempts, abnormal input sequences, or patterns intended to manipulate AI outputs. Confirmed adversarial activity is logged, reviewed by our security and engineering teams, and communicated to affected Participating Entities according to severity. Participating Entity administrators also have direct visibility through the Governance Console, including model performance metrics, review queue status, audit log activity, alerts, and workflow behavior. This allows Participating Entities to independently monitor AI activity within their own environment. Incident Response and Escalation AI-related incidents are classified by severity and managed through a structured escalation process. Critical incidents include platform unavailability, confirmed data boundary breach, confirmed adversarial attack affecting outputs, or AI-assisted activity causing demonstrable harm. Response is initiated within one hour, with engineering and leadership escalation. High incidents include significant model accuracy degradation, confirmed bias manifestation in production outputs, human review queue failure, or a security event with potential data exposure. Response is initiated within four hours, with Participating Entity notification based on incident impact. Medium incidents include elevated error rates, data drift warnings, integration failures affecting workflow throughput, or anomalous output distributions not yet confirmed as bias. Response is initiated within one business day. Low incidents include minor performance degradation, routine configuration anomalies, or monitoring alerts that resolve without intervention. These are logged and reviewed through regular performance reporting. Critical and High incidents are escalated to the Responsible AI Officer, assigned account manager, and appropriate engineering leadership. The account manager coordinates Participating Entity communications, including initial notification, interim updates, and final resolution reporting. Every Critical and High incident undergoes a post-incident review. The review documents root cause, immediate remediation, preventive actions, and any required platform or governance changes. Findings are shared with the affected Participating Entity and incorporated into future platform controls where systemic improvements are identified. Regulatory, Legal, and Compliance Risk Management Regulatory, legal, and compliance risks are treated as core AI risk categories.	

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		During onboarding, we conduct a governance and regulatory review to identify applicable federal, state, local, sector-specific, privacy, records, and procurement obligations relevant to the Participating Entity's planned AI use cases. For use cases involving automated or AI-assisted decision support, especially in benefits, employment, education, healthcare, enforcement, or other high-impact areas, Sequora defaults to human-in-the-loop review. AI outputs are treated as recommendations or workflow support unless the Participating Entity expressly approves a different configuration within applicable law and policy. Sequora maintains detailed audit logs that support audit readiness, public records obligations, internal review, oversight inquiries, and administrative appeal processes. Audit records may include input references, model version, workflow configuration, output, confidence score, user activity, and human review actions. We also monitor emerging AI governance laws, privacy requirements, procurement obligations, and public-sector compliance expectations. When new legal or regulatory developments may affect a Participating Entity's deployment, we assess the impact, recommend configuration updates where needed, and communicate relevant changes to affected entities. Third-Party and Supply Chain Risk We assess the risk profile of third-party infrastructure providers, model providers, and subprocessors that support Sequora. This includes reviewing security certifications, data processing terms, data residency implications, retention practices, model training restrictions, and jurisdictional risk. Material changes in subprocessor risk, data processing practices, hosting location, or provider terms are disclosed to affected Participating Entities as appropriate. Where needed, Sequora can be reconfigured to reduce exposure, apply additional data minimization controls, or transition to an alternative approved provider. Through this lifecycle-based approach, Sequora helps Participating Entities identify AI risks early, monitor them continuously, respond quickly when issues occur, and maintain accountable, auditable, and compliant AI operations.	
94	Describe how your AI solutions or implementations provide transparency and explainability. Include: • Information available to users and administrators;	Transparency and explainability are not optional features in government AI deployments — they are legal and ethical obligations. Government staff must be able to explain AI-assisted decisions to supervisors, oversight bodies, and affected constituents. Affected individuals have a right to understand why a decision was made that affects them. Auditors and inspectors general need a complete, reliable record of how AI was used. Our platform is designed to meet all of these requirements as a baseline, not as a premium add-on. Information Available to Users and Administrators: End User Transparency: Every AI-generated output presented to an operational staff member through the Sequora platform includes the following information alongside the output itself: a plain-language explanation of the	*

	• Availability of logs, audit trails, or documentation to support compliance or regulatory review; • Auditability of outputs or model behavior; and • Known limitations.	primary factors that contributed to the output, expressed in terms the reviewing staff member can understand and act on without technical expertise; a calibrated confidence score indicating the platform's assessed reliability of the output; a clear visual indicator distinguishing AI-generated content from human-authored content, ensuring staff never mistake an AI output for a confirmed determination; and a one-click pathway to route the output to human review or override it entirely, reinforcing that the staff member — not the AI — holds decision authority. Administrator Transparency: Participating entity administrators have access to the Sequora Governance Console, which provides the following information in real time: a dashboard of all active AI workflows, their current performance metrics, confidence score distributions, and human review queue volumes; a model registry listing every AI model active in the environment, including the model version, deployment date, last bias test date and results, approved use cases, and current accuracy metrics; a complete, searchable audit log of all AI actions taken within the environment; active alerts for anomalous model behavior, confidence degradation, or data drift; and a configuration history showing all changes made to governance settings, who made them, and when. Explainability Outputs by Use Case: The depth and format of explainability outputs are calibrated to the use case. For document classification tasks, the explanation identifies the specific document features — keywords, structural elements, field values — that drove the classification decision. For eligibility or adjudication support use cases, the explanation identifies the input factors, their relative weights in the AI's assessment, and the comparable precedent cases or policy rules that informed the output. For agentic workflow tasks, the explanation provides a step-by-step log of the agent's reasoning process — the goal it was pursuing, the tools it called, the intermediate outputs it produced, and the decision points at which it chose to escalate to human review rather than proceed autonomously. Availability of Logs, Audit Trails, and Documentation for Compliance and Regulatory Review: Immutable Audit Logs: The Sequora platform generates an immutable, time-stamped audit log entry for every AI inference, agent action, workflow transition, human review decision, configuration change, and administrative action. Immutability is enforced at the storage layer — audit log entries cannot be modified or deleted by any user, including administrators or our own engineering team, after they are written. This design ensures that the audit record presented to an OIG auditor, a court, or a legislative oversight body reflects exactly what happened, without any possibility of retroactive alteration. Log Content: Each audit log entry captures the following fields at minimum: timestamp (to millisecond precision); the user or system component that initiated the action; the AI model version used; the input data summary (with PII masked in accordance with the entity's data classification configuration); the output produced; the confidence score assigned to the output; whether the output was routed to human review and, if so, the reviewing staff member's identity and the action they took; and the workflow and task identifier linking the entry to its broader operational context. Log Access and Export: Audit logs are searchable by date range, workflow, user, model version, confidence score range, and disposition (autonomous vs. human-reviewed). Authorized administrators can export logs in structured formats (JSON, CSV) for import into the entity's SIEM, records management	

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		system, or e-discovery platform. Log exports are available on demand without requiring our involvement — participating entities have direct, self-service access to their complete audit history at all times. Compliance Documentation: In addition to operational audit logs, we maintain and make available to participating entities the following compliance documentation: the entity's Deployment Governance Configuration record, documenting all active governance settings and the regulatory basis for each; the current model registry with bias test results for all active models; the Data Sovereignty Configuration Record documenting data residency and processing boundaries; the subprocessor list with current compliance certifications; and the incident log covering any AI-related incidents within the entity's environment and their resolution status. This documentation package is designed to support the entity's own compliance reporting, regulatory examinations, and internal audit functions without requiring the entity to reconstruct compliance evidence from raw technical logs. Retention: Audit logs are retained for a minimum of 12 months by default, with configurable extension to meet specific regulatory retention requirements. For participating entities subject to longer records retention obligations — such as state agencies operating under multi-year public records retention schedules — we configure extended retention at no additional charge up to 7 years, and at standard storage rates beyond that threshold. Auditability of Outputs and Model Behavior: Output Traceability: Every output produced by the Sequora platform can be traced back to its complete decision record — the input that generated it, the model version that processed it, the confidence score assigned to it, the governance controls that were active at the time, and the human review action taken on it if applicable. This traceability is end-to-end and does not depend on the participating entity having retained any separate records — the platform audit log is the authoritative record. Model Version Control: All AI models active in the platform are version-controlled, with each version's deployment date, retirement date, bias test results, and performance benchmarks recorded in the model registry. If an audit inquiry requires the participating entity to demonstrate what model was producing outputs during a specific time period, the model registry provides a definitive answer. If a model update is later found to have introduced a performance issue, the version control record allows us to identify exactly which outputs were produced by the affected version. Behavioral Consistency Testing: We conduct regular behavioral consistency testing on production models to verify that model outputs remain stable and consistent for equivalent inputs over time. Unexplained behavioral shifts — where a model produces materially different outputs for inputs that should yield consistent results — are flagged as potential model integrity issues and investigated before they affect participating entity operations. Counterfactual Explanations: For eligibility, adjudication, and classification use cases where affected individuals may challenge an AI-assisted decision, we support the generation of counterfactual explanations — plain-language statements describing what would need to be different about the input for the AI to have produced a different output. These explanations support both the staff member's ability to explain a decision in an appeal or reconsideration process and the affected individual's ability to understand what they could do differently to achieve a different outcome. Known Limitations: We believe transparency about limitations is itself a dimension of responsible	

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		AI governance. The following are known limitations of our current transparency and explainability capabilities that participating entities should understand before deployment: Foundation Model Opacity: The Sequora platform accesses foundation model capabilities through third-party APIs including Amazon Bedrock. While we provide plain-language explanations of AI outputs at the application layer, the internal mathematical operations of the underlying foundation models are not fully transparent even to us — this is a characteristic shared by all large language model-based AI systems currently available. Our application-layer explanations describe the inputs and factors that influenced outputs at the level we can observe and control, but they do not constitute a full mathematical reconstruction of the model's internal reasoning. For use cases where full mathematical transparency is legally required, we advise participating entities to consult with legal counsel about whether current AI technology can satisfy that requirement and to configure mandatory human review for all outputs in those categories. Confidence Score Calibration: Our confidence scores are calibrated indicators of model reliability, not guarantees of accuracy. A high confidence score means the model's internal signals are consistent and strong for that output — it does not mean the output is definitively correct. Participating entities should configure human review thresholds that reflect their tolerance for error in specific use cases, rather than treating high-confidence outputs as self-validating. Retrospective Explanation Limitations: Our explainability outputs are generated at the time of inference. If a participating entity requires an explanation for an output produced before our current explainability capabilities were active in their environment, we may not be able to reconstruct a full explanation from the audit log alone. We recommend that participating entities activate explainability logging from day one of production operation to ensure complete retrospective traceability. Language and Accessibility of Explanations: Our plain-language explanations are currently generated in English. For participating entities serving multilingual constituent populations who may require explanations in languages other than English, we recommend supplementing our automated explanations with human translation for constituent-facing communications	
95	Describe how human oversight is incorporated into your AI solutions or implementations you support. Include: • Human-in-the-loop or oversight mechanisms; • Ability for Participating Entities to intervene or override; and • Configurability of controls.	Human oversight is built into the Sequora Agentic AI platform as a core governance control, not an optional feature. The platform is designed to support AI-assisted decision-making while ensuring that Participating Entity staff retain authority over workflows, approvals, and final actions. Sequora supports human-in-the-loop review at multiple levels. Participating Entities can require human review before AI-generated outputs are finalized, before workflow actions are executed, or before recommendations are used in higher-risk operational contexts. Confidence thresholds can be configured so that low-confidence outputs, unusual results, sensitive data categories, or regulated decision types are automatically routed to designated reviewers. Participating Entity administrators can intervene, override, approve, reject, or modify AI outputs through the platform’s governance console. Administrators may also enable or disable specific AI workflows, adjust approval requirements, modify role permissions, set escalation rules, and define which categories of AI output require mandatory human approval.	*

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		These controls are fully configurable by use case, department, role, risk level, and regulatory requirement. For example, a Participating Entity may allow AI to automate low-risk document routing while requiring staff approval for benefits-related, education-related, public safety-related, or compliance-sensitive outputs. All human review actions, overrides, approvals, and configuration changes are logged for auditability and oversight.	
96	Provide one example where your responsible AI controls identified or mitigated a risk in a live deployment or client engagement. Include: • Context; • What triggered the control; • Whether the risk had regulatory, legal, or compliance dimensions and how those were addressed; and • Outcome and corrective action.	In a state health and human services engagement involving Medicaid-related data workflows, our responsible AI controls identified a risk during implementation testing before the workflow was moved into broader production use. The platform was being configured to support AI-assisted ETL validation, anomaly detection, and reporting support across complex Medicaid data pipelines. The control was triggered when the platform detected inconsistent confidence scores and anomalous validation patterns across certain data categories. Because the workflow involved regulated health and program data, the risk had both operational and compliance dimensions. Incorrect or unsupported outputs could have affected reporting accuracy and created audit exposure for the client. To address the issue, our team paused broader rollout of the affected workflow, routed the flagged outputs to human review, and performed a root cause analysis. We refined the validation logic, adjusted confidence thresholds, strengthened data quality checks, and documented the control changes in the governance record. The workflow was not expanded until the corrected configuration was tested and approved. The outcome was a safer and more reliable deployment. The client retained human authority over sensitive outputs, reporting accuracy improved, and the corrective action strengthened the platform configuration before the risk could affect production operations.	*
97	Describe how your organization handles situations where an AI system produces materially incorrect, harmful, or non-compliant outputs in a production environment. Include: • Detection mechanisms; • Notification protocols; • Responsibility for remediation; • Contractual or service-level implications; and	Sequora is designed to detect, escalate, remediate, and document materially incorrect, harmful, or non-compliant AI outputs in production environments. Our approach combines automated monitoring, human review, incident response, Participating Entity notification, and corrective action. Detection mechanisms include confidence scoring, anomaly detection, output validation rules, human review queues, audit log monitoring, bias and drift monitoring, and administrator feedback. Outputs that fall below defined confidence thresholds, conflict with configured policy rules, involve sensitive data, or trigger compliance controls are routed to human review before being acted upon. When a materially incorrect, harmful, or non-compliant output is identified, the issue is classified by severity. Critical or high-severity issues are escalated to our engineering team, account manager, and responsible AI lead. The affected Participating Entity is notified according to the nature and severity of the issue, with status updates provided until resolution. If the issue involves a potential security, privacy, breach, or regulatory reporting obligation, we support the Participating Entity's notification process in accordance with applicable contractual and legal requirements.	*

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	• Any regulatory or legal notification requirements supported (e.g., breach or incident notification timelines).	Responsibility for remediation is shared through a clear operating model. Our team is responsible for investigating platform behavior, identifying root cause, correcting configuration or model-related issues, documenting corrective actions, and supporting the Participating Entity through resolution. The Participating Entity retains authority over operational decisions, external notifications, and final disposition of affected records or workflows. Corrective actions may include disabling the affected workflow, increasing human review requirements, adjusting prompts or confidence thresholds, correcting integration logic, applying additional data validation controls, updating model configuration, or issuing a written incident report. Critical and high-severity incidents are followed by a post-incident review to document root cause, remediation, preventive actions, and any service-level implications. Where applicable, service credits may be reviewed under the support terms associated with the Participating Entity's subscription tier.	
98	Describe your standard approach to intellectual property, data portability, and exit rights for Participating Entities. Include: • Your typical position on ownership of custom configurations or implementations; • Whether Participating Entities receive a license to continue using configurations after an engagement concludes; • How you support data portability at contract expiration; • Whether Participating Entity data (including logs, prompts, and outputs) can be fully exported without restriction and in what format; and • Any limitations related to data location, transfer, or jurisdiction during or	Our standard approach is designed to preserve Participating Entity ownership of its data, provide practical exit rights, and avoid unnecessary vendor lock-in while protecting the pre-existing intellectual property of the Sequora Agentic AI platform. Participating Entities retain ownership of their data at all times. This includes source data provided to the platform, user-submitted content, configuration inputs, prompts created specifically for the Participating Entity, AI-generated outputs, workflow records, audit logs, and operational metadata associated with the Participating Entity's use of Sequora. We do not claim ownership over Participating Entity data, and we do not use Participating Entity data to train third-party foundation models without express written authorization. Custom configurations, workflow designs, templates, prompts, routing rules, role structures, integration mappings, dashboards, and implementation artifacts created specifically for a Participating Entity are treated as client-specific configuration assets. Our typical position is that the Participating Entity may continue to use those configurations during the term of the subscription and, where technically feasible, may export documentation or machine-readable configuration records at contract expiration. The underlying Sequora platform, software code, proprietary frameworks, reusable product components, model orchestration logic, and pre-existing accelerators remain our intellectual property. Participating Entities receive a license to use their configured Sequora environment, including approved workflows and implementation configurations, for the duration of the active subscription or applicable transaction document. After the engagement concludes, the Participating Entity may retain exported data, reports, prompts, logs, outputs, workflow documentation, and configuration documentation for its internal records, compliance, audit, and transition purposes. Continued live use of the Sequora platform after expiration would require an active subscription or separately negotiated transition arrangement. At contract expiration or termination, we support data portability through an orderly exit process. Upon request, we provide a full export of Participating	*

	after contract termination. Where your standard commercial terms differ from what you would negotiate for public sector clients, please describe the range of flexibility available.	Entity data in commonly used formats such as CSV, JSON, XLSX, PDF, and/or secure flat-file exports, depending on the data type and the Participating Entity's requirements. Available export categories include source records processed by the platform, prompts, AI outputs, workflow histories, user activity logs, audit logs, configuration records, integration mappings, reports, and administrative settings. Exports are provided through secure transfer methods, such as encrypted file transfer or secure cloud storage controlled by the Participating Entity. Participating Entity data, including logs, prompts, outputs, and audit records, can be exported without vendor restriction, subject only to security, privacy, legal, technical, and contractual safeguards. We do not impose artificial restrictions intended to prevent a Participating Entity from transitioning to another solution or maintaining its own records. Where certain proprietary platform logic cannot be exported as executable software, we provide reasonable documentation of configurations, workflow rules, and data structures to support transition planning. Data location and jurisdictional controls remain in effect during the exit process. U.S. Participating Entity data is exported from the applicable AWS U.S. region unless otherwise authorized. Canadian Participating Entity data may be exported from AWS Canadian regions when Canadian data residency has been configured. We do not transfer Participating Entity data across jurisdictions during or after termination without authorization. After completion of the export and any required retention period, Participating Entity data is deleted or retained according to the applicable transaction documents, records requirements, and mutually agreed retention schedule. For public-sector clients, we are flexible in negotiating reasonable exit, data return, retention, destruction, audit, and transition support terms. Where our standard commercial terms differ from a Participating Entity's public-sector requirements, we can negotiate additional provisions addressing records retention, public records obligations, data destruction certificates, transition assistance periods, data residency, security review, and audit support, provided such terms are commercially reasonable and consistent with our platform architecture and legal obligations.	

Table 8: Exceptions to Terms, Conditions, or Specifications Form (Not Scored)

Line Item 99. **NOTICE**: To identify any exception, or to request any modification, to Sourcewell standard Master Agreement terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) **via redline in the Master Agreement Template provided** in the "Bid Documents" section. Proposer must upload the redlined Master Agreement Template, in **Microsoft Word format** in the "Requested Exceptions" upload field. All exceptions and/or proposed modifications are subject to review and approval by Sourcewell and will not automatically be included in the Master Agreement.

Do you have exceptions or modifications to propose?	Response *
	No

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Table 9: Selected Bid Pricing Line Items ****NOT SCORED****

Please fill out table as able. This table is not scored but will be used to prepare competitive solicitation documentation. If you do not offer these products, no pricing is required.

☐ We will not be submitting for Table 9: Selected Bid Pricing Line Items ****NOT SCORED****

#	Bid Item	UOM (Unit of Measurement)	Estimated High Cost	Estimated Low Cost
100	Enterprise AI assistant			
101	Foundation model - API input usage			
102	Foundation model - API output usage			
103	Document intelligence / OCR processing			
104	Grounding / enterprise search requests			
105	AI/ML engineering services			
106	Solution architecture / integration services			
107	Program / governance / change management services			

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 - IT_Automation_LLC_Sourcewell__Price_Sheet.xlsx - Tuesday June 16, 2026 17:06:34
- Financial Strength and Stability (optional)
- Marketing Plan/Samples - IT Automation LLC_Company Brochure.pdf - Tuesday June 16, 2026 16:11:33
- WMBE/MBE/SBE or Related Certificates - Certifications_ITA.pdf - Monday June 01, 2026 12:03:29
- Standard Transaction Document Samples (optional)
- Requested Exceptions (optional)
- Upload Additional Document (optional)

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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. - Ravi Sumanam, Director of Operations, IT Automation LLC

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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.

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File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum_14_Enterprise_Artificial_Intelligence_RFP061726 Thu June 11 2026 08:33 AM	☑	46
Addendum_13_Enterprise_Artificial_Intelligence_RFP061726 Mon June 8 2026 02:18 PM	☑	3
Addendum_12_Enterprise_Artificial_Intelligence_RFP061726 Fri June 5 2026 04:39 PM	☑	8
Addendum_11_Enterprise_Artificial_Intelligence_RFP061726 Thu June 4 2026 04:20 PM	☑	18
Addendum_10_Enterprise_Artificial_Intelligence_RFP061726 Mon June 1 2026 12:14 PM	☑	18
Addendum_9_Enterprise_Artificial_Intelligence_RFP061726 Wed May 27 2026 03:06 PM	☑	2
Addendum_8_Enterprise_Artificial_Intelligence_RFP061726 Tue May 26 2026 03:03 PM	☑	3
Addendum_7_Enterprise_Artificial_Intelligence Fri May 22 2026 01:39 PM	☑	2
Addendum_7_Enterprise_Artificial_Intelligence_061726 Fri May 22 2026 01:31 PM	☑	2
Addendum_6_Enterprise_Artificial_Intelligence_RFP061726 Tue May 19 2026 04:56 PM	☑	6
Addendum_5_Enterprise_Artificial_Intelligence Fri May 15 2026 03:01 PM	☑	12
Addendum_4_Enterprise_Artificial_Intelligence_RFP061726 Thu May 14 2026 07:57 AM	☑	13
Amendment_2_Enterprise_Artificial_Intelligence Tue May 12 2026 04:38 PM	☑	1
Addendum_3_Enterprise_Artificial_Intelligence_RFP061726 Wed May 6 2026 11:34 AM	☑	5
Addendum_2_Enterprise_Artificial_Intelligence_RFP061726 Fri May 1 2026 02:35 PM	☑	2
Amendment_1_Enterprise_Artificial_Intelligence Fri May 1 2026 10:22 AM	☑	1
Addendum_1_Enterprise_Artificial_Intelligence_RFP061726 Thu April 30 2026 04:20 PM	☑	2