

**Solicitation Number: RFP #121923****CONTRACT**

This Contract is between Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Computer Aid, Inc., 1390 Ridgeview Drive, Allentown, PA 18104 (Supplier).

Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that offers cooperative procurement solutions to government entities. Participation is open to eligible federal, state/province, and municipal governmental entities, higher education, K-12 education, nonprofit, tribal government, and other public entities located in the United States and Canada. Sourcewell issued a public solicitation for Technology Products and Services with Related Solutions from which Supplier was awarded a contract in Categories 2 and 3.

Supplier desires to contract with Sourcewell to provide equipment, products, or services to Sourcewell and the entities that access Sourcewell's cooperative purchasing contracts (Participating Entities).

1. TERM OF CONTRACT

A. **EFFECTIVE DATE.** This Contract is effective upon the date of the final signature below.

EXPIRATION DATE AND EXTENSION. This Contract expires February 27, 2028, unless it is cancelled sooner pursuant to Article 22. This Contract allows up to three additional one-year extensions upon the request of Sourcewell and written agreement by Supplier. Sourcewell retains the right to consider additional extensions beyond seven years as required under exceptional circumstances.

B. **SURVIVAL OF TERMS.** Notwithstanding any expiration or termination of this Contract, all payment obligations incurred prior to expiration or termination will survive, as will the following: Articles 11 through 14 survive the expiration or cancellation of this Contract. All other rights will cease upon expiration or termination of this Contract.

2. EQUIPMENT, PRODUCTS, OR SERVICES

A. EQUIPMENT, PRODUCTS, OR SERVICES. Supplier will provide the Equipment, Products, or Services as stated in its Proposal submitted under the Solicitation Number listed above. Supplier's Equipment, Products, or Services Proposal (Proposal) is attached and incorporated into this Contract.

All Equipment and Products provided under this Contract must be new and the current model. Supplier may offer close-out or refurbished Equipment or Products if they are clearly indicated in Supplier's product and pricing list. Unless agreed to by the Participating Entities in advance, Equipment or Products must be delivered as operational to the Participating Entity's site.

This Contract offers an indefinite quantity of sales, and while substantial volume is anticipated, sales and sales volume are not guaranteed.

B. WARRANTY. Supplier warrants that all Equipment, Products, and Services furnished are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Equipment, Products, and Services are suitable for and will perform in accordance with the ordinary use for which they are intended. Supplier's dealers and distributors must agree to assist the Participating Entity in reaching a resolution in any dispute over warranty terms with the manufacturer. Any manufacturer's warranty that extends beyond the expiration of the Supplier's warranty will be passed on to the Participating Entity.

C. DEALERS, DISTRIBUTORS, AND/OR RESELLERS. Upon Contract execution and throughout the Contract term, Supplier must provide to Sourcwell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers relative to the Equipment, Products, and Services offered under this Contract, which will be incorporated into this Contract by reference. It is the Supplier's responsibility to ensure Sourcwell receives the most current information.

3. PRICING

All Equipment, Products, or Services under this Contract will be priced at or below the price stated in Supplier's Proposal.

When providing pricing quotes to Participating Entities, all pricing quoted must reflect a Participating Entity's total cost of acquisition. This means that the quoted cost is for delivered Equipment, Products, and Services that are operational for their intended purpose, and includes all costs to the Participating Entity's requested delivery location.

Regardless of the payment method chosen by the Participating Entity, the total cost associated with any purchase option of the Equipment, Products, or Services must always be disclosed in the pricing quote to the applicable Participating Entity at the time of purchase.

A. **SHIPPING AND SHIPPING COSTS.** All delivered Equipment and Products must be properly packaged. Damaged Equipment and Products may be rejected. If the damage is not readily apparent at the time of delivery, Supplier must permit the Equipment and Products to be returned within a reasonable time at no cost to Sourcewell or its Participating Entities. Participating Entities reserve the right to inspect the Equipment and Products at a reasonable time after delivery where circumstances or conditions prevent effective inspection of the Equipment and Products at the time of delivery. In the event of the delivery of nonconforming Equipment and Products, the Participating Entity will notify the Supplier as soon as possible and the Supplier will replace nonconforming Equipment and Products with conforming Equipment and Products that are acceptable to the Participating Entity.

Supplier must arrange for and pay for the return shipment on Equipment and Products that arrive in a defective or inoperable condition.

Sourcewell may declare the Supplier in breach of this Contract if the Supplier intentionally delivers substandard or inferior Equipment or Products.

B. **SALES TAX.** Each Participating Entity is responsible for supplying the Supplier with valid tax-exemption certification(s). When ordering, a Participating Entity must indicate if it is a tax-exempt entity.

C. **HOT LIST PRICING.** At any time during this Contract, Supplier may offer a specific selection of Equipment, Products, or Services at discounts greater than those listed in the Contract. When Supplier determines it will offer Hot List Pricing, it must be submitted electronically to Sourcewell in a line-item format. Equipment, Products, or Services may be added or removed from the Hot List at any time through a Sourcewell Price and Product Change Form as defined in Article 4 below.

Hot List program and pricing may also be used to discount and liquidate close-out and discontinued Equipment and Products as long as those close-out and discontinued items are clearly identified as such. Current ordering process and administrative fees apply. Hot List Pricing must be published and made available to all Participating Entities.

4. PRODUCT AND PRICING CHANGE REQUESTS

Supplier may request Equipment, Product, or Service changes, additions, or deletions at any time. All requests must be made in writing by submitting a signed Sourcewell Price and Product Change Request Form to the assigned Sourcewell Supplier Development Administrator. This approved form is available from the assigned Sourcewell Supplier Development Administrator. At a minimum, the request must:

- Identify the applicable Sourcewell contract number;
- Clearly specify the requested change;
- Provide sufficient detail to justify the requested change;
- Individually list all Equipment, Products, or Services affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
- Include a complete restatement of pricing documentation in Microsoft Excel with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Equipment, Products, and Services 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 Contract and will be incorporated by reference.

5. PARTICIPATION, CONTRACT ACCESS, AND PARTICIPATING ENTITY REQUIREMENTS

A. PARTICIPATION. Sourcewell's cooperative contracts are available and open to public and nonprofit entities across the United States and Canada; such as federal, state/province, municipal, K-12 and higher education, tribal government, and other public entities.

The benefits of this Contract should be available to all Participating Entities that can legally access the Equipment, Products, or Services under this Contract. A Participating Entity's authority to access this Contract is determined through its cooperative purchasing, interlocal, or joint powers laws. Any entity accessing benefits of this Contract will be considered a Service Member of Sourcewell during such time of access. Supplier understands that a Participating Entity's use of this Contract is at the Participating Entity's sole convenience and Participating Entities reserve the right to obtain like Equipment, Products, or Services from any other source.

Supplier is responsible for familiarizing its sales and service forces with Sourcewell contract use eligibility requirements and documentation and will encourage potential participating entities to join Sourcewell. Sourcewell reserves the right to add and remove Participating Entities to its roster during the term of this Contract.

B. PUBLIC FACILITIES. Supplier's employees may be required to perform work at government-owned facilities, including schools. Supplier's employees and agents must conduct themselves in a professional manner while on the premises, and in accordance with Participating Entity policies and procedures, and all applicable laws.

6. PARTICIPATING ENTITY USE AND PURCHASING

A. ORDERS AND PAYMENT. To access the contracted Equipment, Products, or Services under this Contract, a Participating Entity must clearly indicate to Supplier that it intends to access this Contract; however, order flow and procedure will be developed jointly between Sourcewell and

Supplier. Typically, a Participating Entity will issue an order directly to Supplier or its authorized subsidiary, distributor, dealer, or reseller. If a Participating Entity issues a purchase order, it may use its own forms, but the purchase order should clearly note the applicable Sourcewell contract number. All Participating Entity orders under this Contract must be issued prior to expiration or cancellation of this Contract; however, Supplier performance, Participating Entity payment obligations, and any applicable warranty periods or other Supplier or Participating Entity obligations may extend beyond the term of this Contract.

Supplier's acceptable forms of payment are included in its attached Proposal. Participating Entities will be solely responsible for payment and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.

B. **ADDITIONAL TERMS AND CONDITIONS/PARTICIPATING ADDENDUM.** Additional terms and conditions to a purchase order, or other required transaction documentation, may be negotiated between a Participating Entity and Supplier, such as job or industry-specific requirements, legal requirements (e.g., affirmative action or immigration status requirements), or specific local policy requirements. Some Participating Entities may require the use of a Participating Addendum, the terms of which will be negotiated directly between the Participating Entity and the Supplier or its authorized dealers, distributors, or resellers, as applicable. Any negotiated additional terms and conditions must never be less favorable to the Participating Entity than what is contained in this Contract.

C. **SPECIALIZED SERVICE REQUIREMENTS.** In the event that the Participating Entity requires service or specialized performance requirements not addressed in this Contract (such as e-commerce specifications, specialized delivery requirements, or other specifications and requirements), the Participating Entity and the Supplier may enter into a separate, standalone agreement, apart from this Contract. Sourcewell, including its agents and employees, will not be made a party to a claim for breach of such agreement.

D. **TERMINATION OF ORDERS.** Participating Entities may terminate an order, in whole or in part, immediately upon notice to Supplier in the event of any of the following events:

1. The Participating Entity fails to receive funding or appropriation from its governing body at levels sufficient to pay for the equipment, products, or services to be purchased; or
2. Federal, state, or provincial laws or regulations prohibit the purchase or change the Participating Entity's requirements.

E. **GOVERNING LAW AND VENUE.** The governing law and venue for any action related to a Participating Entity's order will be determined by the Participating Entity making the purchase.

7. CUSTOMER SERVICE

A. PRIMARY ACCOUNT REPRESENTATIVE. Supplier will assign an Account Representative to Sourcewell for this Contract and must provide prompt notice to Sourcewell if that person is changed. The Account Representative will be responsible for:

- Maintenance and management of this Contract;
- Timely response to all Sourcewell and Participating Entity inquiries; and
- Business reviews to Sourcewell and Participating Entities, if applicable.

B. BUSINESS REVIEWS. Supplier must perform a minimum of one business review with Sourcewell per contract year. The business review will cover sales to Participating Entities, pricing and contract terms, administrative fees, sales data reports, performance issues, supply issues, customer issues, and any other necessary information.

8. REPORT ON CONTRACT SALES ACTIVITY AND ADMINISTRATIVE FEE PAYMENT

A. CONTRACT SALES ACTIVITY REPORT. Each calendar quarter, Supplier must provide a contract sales activity report (Report) to the Sourcewell Supplier Development Administrator assigned to this Contract. Reports are due no later than 45 days after the end of each calendar quarter. A Report must be provided regardless of the number or amount of sales 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;
- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;
- Sourcewell Assigned Entity/Participating Entity Number;
- Item Purchased Description;
- Item Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Purchase was invoiced/sale was recognized as revenue by Supplier.

B. ADMINISTRATIVE FEE. In consideration for the support and services provided by Sourcewell, the Supplier will pay an administrative fee to Sourcewell on all Equipment, Products, and

Services provided to Participating Entities. The Administrative Fee must be included in, and not added to, the pricing. Supplier may not charge Participating Entities more than the contracted price to offset the Administrative Fee.

The Supplier will submit payment to Sourcewell for the percentage of administrative fee stated in the Proposal multiplied by the total sales of all Equipment, Products, and Services purchased by Participating Entities under this Contract during each calendar quarter. Payments should note the Supplier's name and Sourcewell-assigned contract number in the memo; and must be mailed to the address above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions. Payments must be received no later than 45 calendar days after the end of each calendar quarter.

Supplier agrees to cooperate with Sourcewell in auditing transactions under this Contract to ensure that the administrative fee is paid on all items purchased under this Contract.

In the event the Supplier is delinquent in any undisputed administrative fees, Sourcewell reserves the right to cancel this Contract and reject any proposal submitted by the Supplier in any subsequent solicitation. In the event this Contract is cancelled by either party prior to the Contract's expiration date, the administrative fee payment will be due no more than 30 days from the cancellation date.

9. AUTHORIZED REPRESENTATIVE

Sourcewell's Authorized Representative is its Chief Procurement Officer.

Supplier's Authorized Representative is the person named in the Supplier's Proposal. If Supplier's Authorized Representative changes at any time during this Contract, Supplier must promptly notify Sourcewell in writing.

10. AUDIT, ASSIGNMENT, AMENDMENTS, WAIVER, AND CONTRACT COMPLETE

A. **AUDIT.** Pursuant to Minnesota Statutes Section 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Contract are subject to examination by Sourcewell or the Minnesota State Auditor for a minimum of six years from the end of this Contract. This clause extends to Participating Entities as it relates to business conducted by that Participating Entity under this Contract.

B. **ASSIGNMENT.** Neither party may assign or otherwise transfer its rights or obligations under this Contract without the prior written consent of the other party and a fully executed assignment agreement. Such consent will not be unreasonably withheld. Any prohibited assignment will be invalid.

C. **AMENDMENTS.** Any amendment to this Contract must be in writing and will not be effective until it has been duly executed by the parties.

D. **WAIVER.** Failure by either party to take action or assert any right under this Contract 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. Any such waiver must be in writing and signed by the parties.

E. **CONTRACT COMPLETE.** This Contract represents the complete agreement between the parties. No other understanding regarding this Contract, whether written or oral, may be used to bind either party. For any conflict between the attached Proposal and the terms set out in Articles 1-22 of this Contract, the terms of Articles 1-22 will govern.

F. **RELATIONSHIP OF THE PARTIES.** The relationship of the parties is one of independent contractors, each free to exercise judgment and discretion with regard to the conduct of their respective businesses. This Contract does not create a partnership, joint venture, or any other relationship such as master-servant, or principal-agent.

11. INDEMNITY AND HOLD HARMLESS

Supplier must indemnify, defend, save, and hold Sourcewell and its Participating Entities, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell or its Participating Entities, arising out of any act or omission in the performance of this Contract 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 the Equipment, Products, or Services under this Contract to the extent the Equipment, Product, or Service has been used according to its specifications. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

12. GOVERNMENT DATA PRACTICES

Supplier and Sourcewell must comply with the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13, as it applies to all data provided by or provided to Sourcewell under this Contract and as it applies to all data created, collected, received, maintained, or disseminated by the Supplier under this Contract.

13. INTELLECTUAL PROPERTY, PUBLICITY, MARKETING, AND ENDORSEMENT

A. INTELLECTUAL PROPERTY

1. *Grant of License.* During the term of this Contract:

- a. 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 and

promotional materials for the purpose of marketing Sourcewell's relationship with Supplier.

b. Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising and promotional materials for the purpose of marketing Supplier's relationship 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, and agents (collectively "Permitted Sublicensees") in advertising and promotional materials for the purpose of marketing the Parties' relationship to Participating Entities. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this Article 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. Upon written notice to the breaching party, the breaching party has 30 days of the date of the written notice to cure the breach or the license will be terminated.

4. *Termination.* Upon the termination of this Contract 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.

B. **PUBLICITY.** Any publicity regarding the subject matter of this Contract must not be released without prior written approval from the Authorized Representatives. Publicity includes notices, informational pamphlets, press releases, research, reports, signs, and similar public notices prepared by or for the Supplier individually or jointly with others, or any subcontractors, with respect to the program, publications, or services provided resulting from this Contract.

C. **MARKETING.** Any direct advertising, marketing, or offers with Participating Entities must be approved by Sourcewell. Send all approval requests to the Sourcewell Supplier Development Administrator assigned to this Contract.

D. **ENDORSEMENT.** The Supplier must not claim that Sourcewell endorses its Equipment, Products, or Services.

14. GOVERNING LAW, JURISDICTION, AND VENUE

The substantive and procedural laws of the State of Minnesota will govern this Contract. Venue for all legal proceedings arising out of this Contract, or its breach, must be in the appropriate state court in Todd County, Minnesota or federal court in Fergus Falls, Minnesota.

15. FORCE MAJEURE

Neither party to this Contract will be held responsible for delay or default caused by acts of God or other conditions that are beyond that party's reasonable control. A party defaulting under this provision must provide the other party prompt written notice of the default.

16. SEVERABILITY

If any provision of this Contract 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 Contract is capable of being performed, it will not be affected by such determination or finding and must be fully performed.

17. PERFORMANCE, DEFAULT, AND REMEDIES

A. **PERFORMANCE.** During the term of this Contract, the parties will monitor performance and address unresolved contract issues as follows:

1. *Notification.* The parties must promptly notify each other of any known dispute and work in good faith to resolve such dispute within a reasonable period of time. If necessary, Sourcewell and the Supplier will jointly develop a short briefing document that describes the issue(s), relevant impact, and positions of both parties.
2. *Escalation.* If parties are unable to resolve the issue in a timely manner, as specified above, either Sourcewell or Supplier may escalate the resolution of the issue to a higher level of management. The Supplier will have 30 calendar days to cure an outstanding issue.
3. *Performance while Dispute is Pending.* Notwithstanding the existence of a dispute, the Supplier must continue without delay to carry out all of its responsibilities under the Contract that are not affected by the dispute. If the Supplier fails to continue without delay to perform its responsibilities under the Contract, in the accomplishment of all undisputed work, the Supplier will bear any additional costs incurred by Sourcewell and/or its Participating Entities as a result of such failure to proceed.

B. **DEFAULT AND REMEDIES.** Either of the following constitutes cause to declare this Contract, or any Participating Entity order under this Contract, in default:

1. Nonperformance of contractual requirements, or
2. A material breach of any term or condition of this Contract.

The party claiming default must provide written notice of the default, with 30 calendar days to cure the default. Time allowed for cure will not diminish or eliminate any liability for liquidated or other damages. If the default remains after the opportunity for cure, the non-defaulting party may:

- Exercise any remedy provided by law or equity, or
- Terminate the Contract or any portion thereof, including any orders issued against the Contract.

18. INSURANCE

A. REQUIREMENTS. At its own expense, Supplier must maintain insurance policy(ies) in effect at all times during the performance of this Contract 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. *Workers' Compensation and Employer's Liability.*

Workers' Compensation: As required by any applicable law or regulation.

Employer's Liability Insurance: must be provided in amounts not less than listed below:

Minimum limits:

\$500,000 each accident for bodily injury by accident

\$500,000 policy limit for bodily injury by disease

\$500,000 each employee for bodily injury by disease

2. *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 Contract.

Minimum Limits:

\$1,000,000 each occurrence Bodily Injury and Property Damage

\$1,000,000 Personal and Advertising Injury

\$2,000,000 aggregate for products liability-completed operations

\$2,000,000 general aggregate

3. *Commercial Automobile Liability Insurance.* During the term of this Contract, Supplier will maintain insurance covering all owned, hired, and non-owned automobiles in limits of liability not less than indicated below. The coverage must be subject to terms

no less broad than ISO Business Auto Coverage Form CA 0001 (2010 edition or newer), or equivalent.

Minimum Limits:

\$1,000,000 each accident, combined single limit

4. *Umbrella Insurance*. During the term of this Contract, Supplier will maintain umbrella coverage over Employer's Liability, Commercial General Liability, and Commercial Automobile.

Minimum Limits:

\$2,000,000

5. *Professional/Technical, Errors and Omissions, and/or Miscellaneous Professional Liability*. During the term of this Contract, Supplier will maintain coverage for all claims the Supplier may become legally obligated to pay resulting from any actual or alleged negligent act, error, or omission related to Supplier's professional services required under this Contract.

Minimum Limits:

\$2,000,000 per claim or event

\$2,000,000 – annual aggregate

6. *Network Security and Privacy Liability Insurance*. During the term of this Contract, Supplier will maintain coverage for network security and privacy liability. The coverage may be endorsed on another form of liability coverage or written on a standalone policy. The insurance must cover claims which may arise from failure of Supplier's security resulting in, but not limited to, computer attacks, unauthorized access, disclosure of not public data – including but not limited to, confidential or private information, transmission of a computer virus, or denial of service.

Minimum limits:

\$2,000,000 per occurrence

\$2,000,000 annual aggregate

Failure of Supplier to maintain the required insurance will constitute a material breach entitling Sourcwell to immediately terminate this Contract for default.

B. CERTIFICATES OF INSURANCE. Prior to commencing under this Contract, Supplier must furnish to Sourcwell a certificate of insurance, as evidence of the insurance required under this Contract. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcwell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or sent to the Sourcwell Supplier Development Administrator assigned to this Contract. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf.

Failure to request certificates of insurance by Sourcewell, or failure of Supplier to provide certificates of insurance, in no way limits or relieves Supplier of its duties and responsibilities in this Contract.

C. **ADDITIONAL INSURED ENDORSEMENT AND PRIMARY AND NON-CONTRIBUTORY INSURANCE CLAUSE.** Supplier agrees to list Sourcewell and its Participating Entities, including their officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.

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

E. **UMBRELLA/EXCESS LIABILITY/SELF-INSURED RETENTION.** The limits required by this Contract can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

19. COMPLIANCE

A. **LAWS AND REGULATIONS.** All Equipment, Products, or Services provided under this Contract must comply fully with applicable federal laws and regulations, and with the laws in the states and provinces in which the Equipment, Products, or Services are sold.

B. **LICENSES.** Supplier must maintain a valid and current status on all required federal, state/provincial, and local licenses, bonds, and permits required for the operation of the business that the Supplier conducts with Sourcewell and Participating Entities.

20. BANKRUPTCY, DEBARMENT, OR SUSPENSION CERTIFICATION

Supplier certifies and warrants that it is not in bankruptcy or that it has previously disclosed in writing certain information to Sourcewell related to bankruptcy actions. If at any time during this Contract Supplier declares bankruptcy, Supplier must immediately notify Sourcewell in writing.

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 the Canadian government, as applicable; 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 Contract. Supplier further warrants that it will provide immediate written notice to Sourcwell if this certification changes at any time.

21. PROVISIONS FOR NON-UNITED STATES FEDERAL ENTITY PROCUREMENTS UNDER UNITED STATES FEDERAL AWARDS OR OTHER AWARDS

Participating Entities that use United States federal grant or FEMA funds to purchase goods or services from this Contract may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Article, all references to “federal” should be interpreted to mean the United States federal government. The following list only applies when a Participating Entity accesses Supplier’s Equipment, Products, or Services with United States federal funds.

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

B. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with

the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must be in compliance with all applicable Davis-Bacon Act provisions.

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

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

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

Supplier certifies that during the term of this Contract will comply with applicable requirements as referenced above.

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

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

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

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

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

K. ACCESS TO RECORDS (2 C.F.R. § 200.336). Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and

records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this 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.

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

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

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

O. **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this 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 AND VIDEO SURVEILLANCE SERVICES OR 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.

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

22. CANCELLATION

Sourcewell or Supplier may cancel this Contract at any time, with or without cause, upon 60 days' written notice to the other party. However, Sourcewell may cancel this Contract immediately upon discovery of a material defect in any certification made in Supplier's Proposal. Cancellation of this Contract does not relieve either party of financial, product, or service obligations incurred or accrued prior to cancellation.

Sourcewell

Compter Aid, Inc.

DocuSigned by:
Jeremy Schwartz
By: C0FD2A139D06489...
Jeremy Schwartz
Title: Chief Procurement Officer
Date: 3/4/2024 | 9:14 AM CST

DocuSigned by:
D. Abraham Hunter
By: 2822B073E271448...
D Abraham Hunter
Title: Executive Vice President
Date: 3/4/2024 | 8:25 AM CST

RFP 121923 - Technology Products and Services with Related Solutions

Vendor Details

Company Name: Computer Aid, Inc
Does your company conduct business under any other name? If yes, please state: CAI
Address: 1390 Ridgeview Drive
Allentown, Pennsylvania 18104
Contact: Linda Leiby
Email: Linda.Leiby@cai.io
Phone: 570-337-8698
HST#: 23-2180878

Submission Details

Created On: Thursday November 09, 2023 09:25:43
Submitted On: Monday December 18, 2023 16:37:34
Submitted By: Carly Gassert
Email: CAI.Proposals@cai.io
Transaction #: ac17b60e-b6b8-4ebe-84df-98e151e11f54
Submitter's IP Address: 136.228.217.96

Specifications

Table 1: Proposer Identity & Authorized Representatives

General Instructions (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond "N/A" if the question does not apply to you (preferably with an explanation).

Line Item	Question	Response *
1	Proposer Legal Name (one legal entity only): (In the event of award, will execute the resulting contract as "Supplier")	Computer Aid, Inc.
2	Identify all subsidiary entities of the Proposer whose equipment, products, or services are included in the Proposal.	N/A
3	Identify all applicable assumed names or DBA names of the Proposer or Proposer's subsidiaries in Line 1 or Line 2 above.	CAI has operated as Computer Aid, Inc. (CAI) for its entire history. However, when the name Computer Aid, Inc., was already in use in certain locations, we had to register with an alternate name, shown below: Arkansas: CAII, Inc. Maryland: C.A. Systems Company A/K/A Computer Aid, Inc. Minnesota: CAI, Inc. New Hampshire: Computer Aid, Inc. dba CAII New Jersey: Computer Aid, Inc. dba CAII, Inc. New York: CAII Texas: Computer Aid, Inc. dba CA Systems, Inc.
4	Provide your CAGE code or Unique Entity Identifier (SAM):	1K8V3
5	Proposer Physical Address:	1390 Ridgeview Drive Allentown PA 18104
6	Proposer website address (or addresses):	www.cai.io
7	Proposer's Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the "Proposer's Assurance of Compliance" on behalf of the Proposer and, in the event of award, will be expected to execute the resulting contract):	D. Abraham Hunter; Executive Vice President 1390 Ridgeview Drive, Allentown PA 18104 Abe.Hunter@cai.io (717) 651-3070
8	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Gabriela Feliciano; Executive Director - Public Sector 10 S LaSalle St., Ste 1000, Chicago IL 60603 Gabriela.Feliciano@cai.io (773) 627-3163
9	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Rex Johnson, Executive Director, Cybersecurity Cybersecurity Practice 1390 Ridgeview Drive, Allentown PA 18104 Rex.Johnson@cai.io (913) 579-6716 Jim Wootten, VP Technology Solutions ServiceNow Practice 1390 Ridgeview Drive, Allentown PA 18104 Jim.Wootten@cai.io (302) 753-2474 Linda Leiby, Director, MSP CWS Vendor Programs Office 1390 Ridgeview Drive, Allentown PA 18104 Linda.Lieby@cai.io (717) 651-3080

Table 2: Company Information and Financial Strength

Line Item	Question	Response *
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10	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested equipment, products or services.	<p>CAI is a global technology services firm with more than 8,700 associates worldwide and annual revenue of \$1.06B in 2022. For more than 40 years we have partnered strategically with our clients to help them achieve full business potential, using a broad spectrum of modern tools and methods to address their most complex business challenges. CAI's consulting practices and delivery centers provide tailored solutions and managed services that create lasting value across our clients' applications and IT infrastructures. We are a diverse and innovative global team known for providing right-sized strategy, solutions, and ongoing support for our clients.</p> <p>CAI has been a prime vendor on the Sourcwell IT Managed Service and Staff Augmentation Solutions (IT MSSAS) contract since 2017. We have enrolled multiple Participating Entities nationwide and, with Sourcwell's collaboration, have enrolled the State of Iowa as a state-level participant in the Sourcwell program. The combined revenue brought to the IT MSSAS program is in excess of \$257M as of July 2023.</p> <p>CAI's Public Sector division has been supporting state, city, and local government since 1994 and accounts for more than 86% of CAI's annual revenue.</p> <p>We are responding to Category 2 Security, Cloud, Network, and Data Services with Related Solutions and Category 3 IT Lifecycle Services outlined within the RFP.</p> <p>Given the increasingly dynamic and complex nature of the IT landscape, we believe that collaboration with innovative, agile partners is critical to keep pace with technology enhancements. We believe it is essential for Sourcwell to explore relationships with managed services providers (MSPs) that can offer the broadest spectrum of modern services and solutions to mitigate potential risks to systems and data. CAI's alignment with our strategic partners LMNTRIX and ServiceNow allows us to do just that. This partnership will be referred to as "Team CAI".</p> <p>For Team CAI to achieve this mission as an IT leader in the public sector, we must continually develop and implement plans and programs that will enable us to achieve financial strength (fiscal health), strong culture (associate morale), and delighted clients (client satisfaction). CAI is committed to being purpose-driven, prioritizing client success and employee well-being, and serving the community. We recognize that to be truly engaged, you must feel valued for who you are and what you contribute. We are committed to achieving excellence through celebrating our differences and collaborating on opportunities. Empowering our associates to share different ideas, perspectives, and experiences is a driving force for elevating our success.</p> <p>As a purpose-driven organization, CAI also fosters a work environment to support persons with disabilities. For decades, this has included providing accommodation for persons with physical disabilities, e.g., mobility and hearing impairment. Since 2013, we have focused on working with partners to provide training and career opportunities for neurodiverse individuals. In 2020, we became an original signatory of the "CEO Letter on Disability Inclusion" and registered to participate in the Disability Equality Index (DEI). Sponsored by the American Association of People with Disabilities (AAPD) and Disability:IN, the DEI is a benchmarking tool designed to measure corporate programs and policies that enable persons with disabilities to be effective in the workplace. As a signatory, we committed to participating in the DEI index in the years to come; maintaining a positive impact on the unemployment and underemployment of people with disabilities; and continuing to disseminate disability-inclusion information and its impact on business performance so that employees and other employers understand the value individuals with disabilities bring to the workplace. We are pleased to note we achieved the maximum 100 percent score on the DEI index in 2021, 2022, and in 2023. Companies scoring 80 or above are recognized as a "Best Place to Work for Disability Inclusion."</p> <p>At our heart, we are a people business. We work with others to deliver successful initiatives that help organizations move forward. We have developed lasting relationships as trusted advisors and have loyal, long-term clients.</p>
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11	<p>What are your company's expectations in the event of an award?</p>	<p>Our post-award planning starts with Contract Kickoff meetings. This will finalize all contractual documentation between Sourcewell and CAI. New contractual requirements may become part of flow down terms to existing Members, and users of the program, under the Participating Addendum. We will review the Marketing Plan, Attachment C – CAI Marketing Plan, to discuss the proposed outreach to new and existing Members, as well as adjust anything that may be required.</p> <p>The Marketing Plan plays a key role in long-term program success so that CAI may collaborate with Sourcewell to ensure needs are met, appropriate demographics are targeted, and we are providing a valuable service to Members. We will conclude the sessions with understanding Sourcewell's specific participation and activities to promote the program, who the relevant contact points are, and the immediate and long-term goals established for the program.</p> <p>The Contract Kickoff meeting will be scheduled after award and will include a formal agenda with key CAI personnel. Following the meeting, CAI will provide minutes and document any key decisions that may form part of the contract agreement.</p> <p>The second task is developing and conducting Communications. As a current Sourcewell supplier, we have the relationships in place with existing members and we will work with our current Participating Entities to make them aware of this new award and service.</p> <p>The final task will be updating sales training for CAI staff. Training will be provided to this team for any new requirements based upon the agreed contract, as well as any changes within Sourcewell that can be a 'benefit' shared in the sales process.</p> <p>To summarize, key tasks include:</p> <ul style="list-style-type: none"> I Contract Kickoff Meeting with Sourcewell • Finalize contract documents and terms • Review Marketing Plan • Discuss Sourcewell participation and activities I Communication to Existing Participating Entities • Alert Participating Entities to the new contract award • Discuss steps to move to new contract I Communication to Potential Participating Entities • Update websites and documentation referencing new contract • Kick off marketing efforts announcing new contract I Training • Develop and conduct training on the new Sourcewell contract for CAI sales staff
12	<p>Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response.</p>	<p>CAI has provided a letter of our financial strength; please see Attachment B – Letter of Financial Representation.</p>

13	What is your US market share for the solutions that you are proposing?	<p>Accurate market share data can be challenging to calculate and verify for these respective services, especially in rapidly changing markets with highly customized solutions. We offer some strategies we use to gain market share for our solutions in Table 7.</p> <p>CAI has been providing a variety of services to state and local governments for more than 30 years. We retain our customers through our proven track record working with clients to facilitate innovation and to expand their capabilities through the effective use of IT. Our top 25 customers have been with us for an average of 17.6 years.</p> <p>Remaining current on technology is a critical success factor for our ability to support our clients, and we maintain partnerships with most major technology vendors. We are a ServiceNow Elite partner, with a proven track record configuring ServiceNow environments for our clients, including application integration. We have professional ServiceNow certifications in 18 categories, some are listed in this table, Question 17.</p> <p>We offer comprehensive training and educational resources to help customers understand the value and utility of our ServiceNow solutions, increasing the possibility of choosing our offerings over competitors. See the training listed in Table 8 Question 40.</p> <p>The International Data Corporation (IDC) forecasts that worldwide cybersecurity spending will reach \$174.7B in 2024, with security services the largest and fastest-growing market segment. CAI created a Cybersecurity practice to ensure additional support for current and future clients' needs. We stay ahead of the current cyberthreat landscape and partner with cutting-edge cyber technology providers which will allow us to gain additional market share from the current cyber incumbents.</p> <p>CAI uses the National Institute of Standards and Technology's Cybersecurity Framework (NIST CSF) as the standard for our approach along with other key frameworks and practices. NIST CSF was published in February 2014 in response to Presidential Executive Order 13636, "Improving Critical Infrastructure Cybersecurity," which called for a standardized security framework for critical infrastructure in the United States. The CSF integrates current standards and best practices to help organizations manage their cybersecurity risks.</p> <p>To complement NIST CSF and other standards, CAI considers three key elements to a cybersecurity program, discussed below: Governance is how an organization directs, controls, and executes a vulnerability management strategy. Critical elements include executive support, alignment with strategic objectives, and clear operational guidelines understood by all stakeholders. Governance allows an organization to execute a clear plan, outlines actions, defines responsibilities, and authorizes decisions. Technical refers to the organization's infrastructure capability to withstand cybersecurity threats over time and protect key data and assets as users and systems interact. Specifically, to examine the technology's capability to monitor, protect, and remediate vulnerabilities. Operations and Services considers how the organization functions putting the governance and technology elements into action. It is the control of the program and how it is put into practice.</p> <p>Leveraging these three allows us to take a holistic look at an organization's risk by focusing on protecting the most sensitive data, maintaining operations, and tracking the current threat landscape.</p> <p>Team CAI is the best choice for Sourcewell Members. Team CAI is responsive and will tailor a network compliance and security solution to specific Members.</p>
14	What is your Canadian market share for the solutions that you are proposing?	CAI does not provide Category 2 or Category 3 Services to a Canadian entity at present.
15	Has your business ever petitioned for bankruptcy protection? If so, explain in detail.	No.

16	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer whichever question (either a) or b) just below) best applies to your organization.</p> <p>a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned?</p> <p>b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>A) N/A</p> <p>B) CAI is best described as a managed service provider.</p> <p>For Category 2, CAI will provide the Managed Detection and Response (MDR) project/program management while LMNTRIX provides the MDR platform. The MDR platform encompasses requested services across Category 2 a-f. For Category 2, CAI will also provide ancillary and complementary cybersecurity services, including services such as penetration testing, risk assessments, vulnerability assessments, web application testing, incident response, and compliance/maturity roadmaps.</p> <p>For Category 3, CAI is an Elite partner with ServiceNow and leverages the ServiceNow platform to provide IT Lifecycle Services. These include managed IT Asset Management implementations, assessments, audits, operations, support, maintenance and enhancements. CAI also provides ancillary and complementary services across the ServiceNow platform bridging the gap between the enterprise and IT.</p> <p>With over \$257M in CAI's current Managed Service and Staff Augmentation Solutions (IT MSSAS) and SOW sales supporting Members through Sourcewell, CAI is confident that our approach which has worked with other Sourcewell contracts will continue to work as we add additional contracts and capabilities for current and additional Member entities. The following describes our CAI sales staff and account management services and how they will perform on behalf of Sourcewell, ensuring the Members achieve their goals, and are driven by best practices for great results.</p> <p>CAI Sales Staff</p> <p>CAI is a leading provider of IT services to nationwide public sector clients. CAI will be providing services specific to Category 2 and 3 to Sourcewell Members through its large nationwide network of sales staff and sales leaders, all of whom are full-time employees. CAI views all staff that form part of our leadership forum as 'sales', which expands our reach to market and ability to sell the Sourcewell contract. There are more than 200 advocates for the Sourcewell program, promising strong growth. CAI has offices in eight cities and is currently registered to do business in 47 states; our corporate headquarters is located in Allentown, PA.</p> <p>Our full-time staff is nationwide, which allows us to have a good feel for local market conditions when supporting our clients.</p>
17	<p>If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.</p>	<p>CAI is currently licensed to conduct business in 47 states within the United States.</p> <p>Category 2</p> <p>The cybersecurity service team members' certifications include all of the following:</p> <ul style="list-style-type: none"> • Certified Information Security Professional (CISSP) • Offensive Security Certified Professional (OSCP) • Cisco Certified Internetwork Expert (CCIE) • Global Information Assurance Certification (GIAC) • SANS Institute GIAC Cyber Threat Intelligence (SANS GCTI) • Certified Cloud Security Professional (CCSP) • Global Information Assurance Certification (GIAC) Certified Forensic Analyst (GCFA) • GIAC Certified Forensic Examiner (GCFE) • GIAC Reverse Engineering Malware (GREM) • GIAC Network Forensic Analyst (GNFA) • Certified Ethical Hacker (CEH) <p>Category 3</p> <p>The IT Lifecycle team members' certifications include all of the following:</p> <ul style="list-style-type: none"> • IAITAM Certified Asset Management Professional (CAMP) • IAITAM Certified IT Asset Manager (CITAM) • ServiceNow Implementation Specialist – Software Asset Management (SAM) • ServiceNow Implementation Specialist – Hardware Asset Management (HAM) • ServiceNow Implementation Specialist – Discovery • ServiceNow Implementation Specialist – Service Catalog • ITIL 4
18	<p>Provide all "Suspension or Debarment" information that has applied to your organization during the past ten years.</p>	<p>CAI has not been suspended or disbarred during the last 10 years.</p>

Table 3: Industry Recognition & Marketplace Success

Line Item	Question	Response *
19	Describe any relevant industry awards or recognition that your company has received in the past five years	<p>CAI has been fortunate enough to receive the following awards, recognition, and commendations over the last five years:</p> <p>2023</p> <ul style="list-style-type: none"> • "Gold winner in DEI," 8th Annual 2023 Globe Award for American Business • "Top Workplace in the Lehigh Valley" by the Morning Call (10th year in a row) • "Top Workplace" by the Chicago Tribune • "America's Greatest Workplaces for Diversity," Newsweek <p>2022</p> <ul style="list-style-type: none"> • "Place to Work for Disability Inclusion" by Disability:IN • "Top Workplace in the Lehigh Valley" by the Morning Call "Best • "Best Employers for Diversity" by Forbes • "Top Workplace" by the Chicago Tribune <p>2021</p> <ul style="list-style-type: none"> • "Top Workplace in the Lehigh Valley" by the Morning Call • "Top Workplace" by the Chicago Tribune • "Best Place to Work for Disability Inclusion" by Disability:IN <p>2020</p> <ul style="list-style-type: none"> • "Top Workplace in the Lehigh Valley" by the Morning Call • Lutron - Help Desk Delivers During Pandemic • Bristol Myers Squibb - A2W (Autism2Work) Team Exceeds Expectations Commendation <p>2019</p> <ul style="list-style-type: none"> • Adam Heavner Memorial Award • "Top Workplace in the Lehigh Valley" by the Morning Call • Women in Technology Award Finalist, Autumn Frantz • CIO of the Year (Philia), Nominee Steve Heilenman • A2W recognition by Highmark
20	What percentage of your sales are to the governmental sector in the past three years	In the past three years, 86% of CAI's business has been in the governmental sector. *
21	What percentage of your sales are to the education sector in the past three years	In the past three years, 1% of CAI's business has been in the education sector. *
22	List any state, provincial, or cooperative purchasing contracts that you hold. What is the annual sales volume for each of these contracts over the past three years?	<p>CAI has many state and cooperative contracts; we have provided three years of sales as requested for some of CAI's top grossing revenue clients.</p> <p>Sourcewell – US: \$6,062,018.61 (2020), \$10,513,683 (2021), \$11,717,402 (2022)</p> <p>Sourcewell - State of Iowa: \$29,358,203.90 (2020), \$33,030,639 (2021), \$39,358,362 (2022)</p> <p>District of Columbia: \$58,974,784.35 (2020), \$71,503,338 (2021), \$76,647,909 (2022)</p> <p>State of Arkansas: \$7,969,797.04 (2020), \$8,266,675 (2021), \$7,215,165 (2022)</p> <p>State of Delaware: \$14,303,837.49 (2020), \$13,415,074 (2021), \$7,829,667 (2022)</p> <p>State of Georgia: \$91,016,399.00 (2020), \$124,827,090 (2021), \$149,057,888 (2022)</p> <p>State of New Jersey: \$81,561,259.98 (2020), \$98,807,017 (2021), \$126,830,868 (2022)</p> <p>State of North Carolina: \$102,693,683.63 (2020), \$122,328,579 (2021) \$139,508,733 (2022)</p> <p>Virginia Information Technology Agency: \$120,599,829.85 (2020), \$162,375,431 (2021), \$177,771,971 (2022)</p>
23	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	CAI does not hold a GSA contract or SOSA contract. *

Table 4: References/Testimonials

Line Item 24. Supply reference information from three customers who are eligible to be Sourcewell participating entities.

Entity Name *	Contact Name *	Phone Number *	
Cleveland Metropolitan School District *At CAI, we take immense pride in the work we do and the successful outcomes we deliver for our clients. To this end, if awarded a contract, we request your agreement to allow us to feature your project as a reference. This will help us demonstrate our capabilities and expertise, while also showcasing the trust and satisfaction our clients have in our services. References will be handled with utmost discretion and respect for your organization.	Jeanelle Greene, Executive Director	(216) 838-0488	*
Metropolitan Water District of Southern California (MWD)	Charlie Eckstrom, Chief Information Officer	(310) 428-0179	*
PACE Suburban Bus	Charlie Eckstrom, Chief information Officer	(847) 228-2347	*

Table 5: Top Five Government or Education Customers

Line Item 25. Provide a list of your top five government, education, or non-profit customers (entity name is optional), including entity type, the state or province the entity is located in, scope of the project(s), size of transaction(s), and dollar volumes from the past three years.

Entity Name	Entity Type *	State / Province *	Scope of Work *	Size of Transactions *	Dollar Volume Past Three Years *	
State of Georgia	Government	Georgia - GA	CAI provides the MSP solution and contractor management services to provide IT contingent labor to the State of Georgia. This program required the transition of more than 600 seated contractors to a fixed markup pricing model requiring new negotiated wage and bill rates for every engagement. We have provided services to the State of Georgia through various cooperative contracts since 2017 using a network of 939 Contractors. We manage Contractors; provide reporting and account management; manage and maintain the e-procurement application; provide support and escalation; screen and interview; and ensure that contractual compliance, service level agreements (SLAs), and key performance indicators (KPIs) are met.	4099 engagements	\$364,901,377	*

<p>Virginia Information Technology Agency (VITA)</p>	<p>Government</p>	<p>Virginia - VA</p>	<p>CAI provides the MSP solution and contractor management services to provide IT contingent labor to VITA. CAI has supported the VITA contract for 15 years and through successful recompetes of the contract. We provide T&M staff augmentation services as well as statement of work (SOW) services via a network of 549 Contractors. We currently work with 57 agencies across the Commonwealth, supporting those agencies with 50 discrete labor categories that are further broken into four skill levels. The rate card is also divided into two regions: Northern Virginia, which takes into consideration the market effects of the Capital area; and the remainder of the Commonwealth. The rates are 'not to exceed' rates. The program is driven by SLAs and KPIs which include like requirements such as Resume Submittal Response Time, Round 1 Fill Rate, Attrition Rates, and Customer Satisfaction Surveys, along with Accurate Billing and System Availability. CAI has maintained SLA targets, often exceeding them. These are measured on a quarterly basis. Customer satisfaction and subcontractor performance are also measured. We use automated processes driven by the VMS so that feedback can be provided independent of CAI, ensuring the integrity of the results. On June 28, 2021, CAI was awarded a new contract providing a continuation of services for a further five years, with an option of a further five years.</p>	<p>8053 engagements</p>	<p>\$460,747,231.85</p>
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State of North Carolina	Government	North Carolina - NC	<p>CAI holds the contract to provide all temporary IT staff augmentation Resources to the State of North Carolina via an MSP solution, which meets contractual SLAs, KPIs, and reporting targets; and provides continuous improvement and quality management at the core of its service. We work with a Contractor network, established rates, and supply qualified candidates to hiring managers on a timely basis. CAI supports 43 agencies across the state currently and has 790 Resources engaged. The network of Contractors is sizable, with 546 currently enrolled. Our performance is measured through a series of SLAs that target items such as approval time, resume submission to agency time, invoicing accuracy, payment accuracy, and vendor management system (VMS) availability. With CAI's program, the time it takes to fill each role has been reduced from two to three months to about six weeks (including PO creation and candidate notice to current employer), and the reporting capabilities have improved. CAI provides a team of four which includes two account managers, a program/contract lead, and an engagement manager who maintains the subcontractor network, PO process, and invoicing tasks via the VMS applications. The MSP requires CAI to provide agency consultation and job description creation, response management and performance oversight, candidate evaluation, interview facilitation, invoicing, and help desk support as needed. We are working with a large user community, a high volume of Contractors, and many agencies. The State struggled with capacity to manage the MSP itself, with shortfalls in Resources, extended time to hire, as well as no basic data collection to measure growth and success of its program. CAI provided this capability from Day 1, exceeding newly imposed metrics in the first year and retaining that performance level throughout. We have created processes, improved quality year on year, and established monthly and quarterly review meetings to ensure that program goals and customer satisfaction remain on target.</p>	6028 engagements	\$364,530,995.63
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State of New Jersey	Government	New Jersey - NJ	CAI provides the MSP solution and contractor management services to provide IT contingent labor to the State of New Jersey. We have provided services to the State of New Jersey through various cooperative contracts since 2008 utilizing a network of 242 Contractors. We manage Contractors; provide reporting and account management; manage and maintain the e-procurement application; provide support and escalation; screen and interview; and ensure that contractual compliance, SLAs, and KPIs are met.	5375 engagements	\$307,199,144.98	*
District of Columbia	Government	District of Columbia - DC	CAI provides the MSP solution and contractor management services to provide IT contingent labor to the District of Columbia. We manage Contractors; provide reporting and account management, provide support and escalation; screen and interview; and ensure contractual compliance, SLAs, and KPIs are met.	2941 engagements	\$207,126,031.00	*

Table 6: Ability to Sell and Deliver Service

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

Line Item	Question	Response *
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26	Sales force.	<p>CAI is a leading provider of consultative and solution-based IT services to nationwide public sector clients, non-profit organizations, and commercial sector clients. Our experienced and trained sales force is fully prepared to consult with Members through varying mediums as we take the Category 2 and 3 services to the market. With multiple solutions delivered across Team CAI, we have the knowledge and experience to address the questions and issues Members may raise. Team CAI's combination of technical skills and consultation expertise presents confidence throughout the assessment and consulting activities. The success of our solutions to date has been built upon the trusted partnership made with each of our clients; this ensures that client expectations are carefully managed, and the client has a clear path forward based on the results of the consulting activities.</p> <p>CAI will be selling the Sourcewell Technology Products and Services, specifically those under Category 2 and 3 – which include cyber and IT asset management (ITAM) services, through our network of more than 200 sales advocates nationwide. CAI has offices in eight cities and is currently registered to do business in 47 states. CAI's structure is such that all leaders, sales staff, and client-facing delivery staff are considered 'sales' staff. As an example, CAI's delivery teams supporting the Pennsylvania Turnpike Commission (PTC) have made sales through the Sourcewell program by using the cooperative contract as a tool for PTC to procure staff under the IT MSSAS that the PTC would otherwise have had to staff via a competitive task order or request for proposal. The expeditious and efficient approach provided by Sourcewell has certainly played a key role in enabling PTC to quickly address their needs.</p> <p>Rather than telling our prospects what they need, we ask prospects thought provoking questions designed to help them identify their own pain points while we understand their infrastructure and where the risks may occur. Through a consultative sales approach, Members steer themselves into making the best decision for themselves. The benefits the CAI Team sees from a more engaged approach to selling our services include:</p> <ul style="list-style-type: none"> • Increased revenue through both new and existing clients • A shorter sales cycle • Competitive advantage over the competitors • A stronger client relationship where trust is generated early and retained throughout <p>Our company is headquartered in Allentown, PA; we also have offices in Newark, DE; Richmond, VA; Tallahassee and Coconut Creek, FL; Chicago, IL; Des Moines, IA; and Irvine, CA – a total of eight US offices.</p>
27	Dealer network or other distribution methods.	<p>Team CAI's delivery model is simple and poses minimal risk to the Member but is expansive in nature, offering a nationwide reach. With a consultative approach, the CAI Team leads the engagement, with the right blend of skilled staff performing the assessment. We do not rely on a dealer network or other distribution methods to engage with the Member. Consultation is primarily delivered in a remote setting so that we can quickly engage with Members as they reach out to us, or we target through our marketing activities.</p>

28	Service force.	<p>Sourcewell Members benefit from Team CAI to effectively protect their technology investment.</p> <p>Category 2 Working with our account management, Team CAI is fully focused on planning and executing services related to cybersecurity. Team CAI's experts support clients nationwide and are part of the support mechanism behind the managed detection and response (MDR) solution. The 24x7 Cyber Defense Center (CDC) and two malware analysis labs proactively target newly emerging threats for clients. Our teams work remotely, offering the expert coverage needed to support each Member as we collaborate and consult with them.</p> <p>In its most recent report, Gartner predicts that by 2025, 50% of organizations will be using MDR solutions as a component of their threat containment and mitigation capabilities (https://www.gartner.com/en/documents/4003080).</p> <p>Category 3 The CAI ServiceNow Practice was formally established in 2012 in response to customer demand for high-quality ServiceNow consulting and implementation services. Since that time, CAI has engaged in many implementations across varying industries, as well as numerous support engagements, platform development projects, consulting engagements, assessments, and client training initiatives. CAI is an Elite Partner to ServiceNow, a status less than 10% of all ServiceNow Partners receive, recognizing our investment in training and client success across the wide platform in areas such as ITAM, IT Service Management (ITSM), IT Business Management (ITBM), IT Operations Management (ITOM), Human Resources (HR), and Security. Our strong focus on governance, road mapping, and return on investment (ROI) enables us as a long-term partner to provide strategic direction and guidance to our clients, far beyond implementation and support. We are also an Authorized Training Partner.</p> <p>Currently, CAI has nearly 50 ServiceNow experts on staff with broad expertise spanning the ServiceNow platform. We have also implemented ServiceNow internally within CAI, so we completely understand how vital it is to ensure that the platform supports the business process, and that our resources have the expertise and availability to meet our client's goals and objectives.</p>
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>Our proposed solution has the following steps: 1. Initiate contact and receive answers the questions designed to understand their infrastructure and respective needs to create the scope of work and associated pricing, 2. Create the Participating Addendum and obtain approval and signature. These steps assume the entity is already a Sourcewell Member.</p> <p>1. Initiate Contact Members can engage Team CAI through any channel of communication best suited to them. To confirm the needs and discuss requirements, a baseline set of questions will be asked by the CAI Team. Our role is to ensure the ordering process has enough information to support the creation of a Participating Addendum tailored to the member's needs, as well as expedite the process.</p> <p>2. Create the Participating Addendum Once the above ordering steps have been completed, Team CAI will tailor a Participating Addendum according to the discussions with the member and information provided from the questionnaire. The Participating Addendum for the service will lay out the respective scope requested by the member with a detailed quote and total costs for the life of the contract. Our pricing table grants Members additional discounts based on the annual contract value of the solution that has been created and agreed upon for the Participating Addendum.</p>

30	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	<p>CAI identifies three key components that enable the Sourcewell Participating Entity to fully utilize the contract to its utmost capability with satisfying results. The key components are Account Management, Operations Support, and established Service Levels. These components form the basis of our customer service and support program. CAI's experience across a multitude of services contracts and clients, our proven record of implementing and delivering successful programs, our ability to adapt our programs to changes in the industry, and our commitment to industry best practices is unparalleled by other Contractors.</p> <p>Account Management We have Account Management teams at region, state, and local Sourcewell Member levels who provide the advice and guidance in using the service and are also the first point of contact for the Sourcewell Member. Each Account Manager will ensure that any contractual service levels and metrics are being met and identify resolutions if those service levels are falling short. The team will work alongside the client, develop a trusted partnership, and be proactive in the management of the service. With this approach, we can manage and support the day-to-day business while having access to additional Resources during peak periods of activity to ensure customer satisfaction.</p> <p>Operations Support From an operational standpoint, the support structure for our services will be tailored to the scope, complexity, and level of need each member requires. The initial information is gathered after the member initiates contact. The team leverages a shared pool of expert support resources to provide full shift coverage, as well as on-demand consultants that are scheduled as required to complete cyclical tasks and ad hoc security engagements. The model would also include regular access to security and asset management experts that help our clients stay abreast of market changes and new threats, periodically evaluate and optimize service delivery and costs, and provide leadership in architecting and deploying additional solutions.</p> <p>Service Levels Each Sourcewell Participating Entity, through its Participating Addendum of the Sourcewell cooperative contract, can work with CAI to create Service Level Objectives (SLOs) based upon their unique business needs. The reason we do this is to ensure that the service level reflects the size and scope of each Sourcewell Participating Entity, and their anticipated usage. The SLOs are reviewed quarterly, and changes can be made to type, scope, and frequency if the SLO or metric does not measure the most valuable information that the Sourcewell Participating Entity needs.</p> <p>CAI has significant experience creating and delivering against SLOs and will provide input and feedback during the kickoff meeting so that the Sourcewell member can construct SLOs for the most benefit.</p> <p>Please see response in Table 9B, Item 54 for more details on SLO targets.</p> <p>Response Time Capabilities and Commitments CAI is committed to responding to all inquiries from members within two to three business days.</p>
31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in the United States.	CAI will fully support all geographic areas of the United States, including Hawaii and Alaska. We have a nationwide presence as a company, and we are fully confident and committed to exceed requirements for Participating Entities across the United States.
32	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	CAI is willing to provide services to Canadian Sourcewell participating entities in partnership with our Canadian business partner.
33	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed contract.	CAI will support all geographic areas of Sourcewell Participating Entities in the United States and Canada.
34	Identify any Sourcewell participating entity sectors (i.e., government, education, not-for-profit) that you will NOT be fully serving through the proposed contract. Explain in detail. For example, does your company have only a regional presence, or do other cooperative purchasing contracts limit your ability to promote another contract?	CAI will fully support all Sourcewell Participating Entity sectors including government, education, and not-for-profit. The services we are proposing in Category 2 and 3 transverse all sectors. We have a nationwide presence, and we are fully confident in our ability and committed to exceed requirements across all Participating Entity sectors and locations.
35	Define any specific contract requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	We do not have any current competing cooperative contracts that restrict CAI in promoting the Sourcewell Contract should we be awarded a contract.

Table 7: Marketing Plan

Line Item	Question	Response *
36	Describe your marketing strategy for promoting this contract opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>CAI has experience developing successful marketing plans across all our solutions. We understand how to drive business to the contract because we offer the features, benefits, and value of a program in a way that resonates with the Sourcewell Member.</p> <p>CAI understands that Sourcewell works closely with its vendors to promote and educate both the vendor and the Sourcewell Member on the benefits and use of the contract. We understand that Sourcewell advertises awarded contracts in select specific publications; this includes the award in the Contract Directory, so Sourcewell Members know who we are and how to contact us. This also includes that we attend exhibitions, maintain a web presence, and conduct other strategic activities.</p> <p>CAI's marketing strategy will be to continue to collaborate with specific activities and execute further complementary tasks that reach the Sourcewell Member verticals with a tailored approach that gains interest for members with the need of a managed detection and response (MDR) or an Asset Management solution. This approach has contributed to our successes to date. Such verticals will include state and local government, education, and non-profit entities, among others. As new verticals arise during the contract, CAI will develop new strategies to reach those markets. Our discovery process will identify marketing tactics in addition to those discussed below, as well as identify ways to improve and quantify the success of the marketing strategy.</p> <p>To ensure success, CAI will continue to educate our sales representatives so that they fully understand and promote the cooperative way of selling, and the value that brings to the Member and procurement process. A cooperative approach benefits each Member through increased purchasing power; CAI's goal will be to increase the number of Members participating in the Sourcewell Technology Products and Services with Related Solutions contract. This will be measured and reported during the lifecycle of the contract, so that Sourcewell can see an upward growth curve.</p> <p>We will continue to work with Sourcewell Members to provide pricing that is within their reach, adjusting accordingly to the environment. Our service and pricing model is modular in nature allowing the member to only purchase based on their needs. This offers a broad solution to onboarding new Members and getting them active. We can further tailor pricing with additional discounts at the individual member level when needed.</p> <p>In conjunction with this flexibility, CAI is also able to tailor terms and conditions per the individual Member via a specific Participating Addendum. This allows us to work with specific service levels or performance metrics, local or state law, or national laws that benefit the Member and the way they are governed.</p> <p>A strong marketing approach will promote the benefits and advantages to cooperative purchasing so that the rewards are clear to Sourcewell. We will target existing Sourcewell Members, and prospective entities that are not current Sourcewell Members. Our marketing will present the benefits of Sourcewell Membership. CAI and its partners have established clients and potential clients that would be part of our initial market targeting. This will also include targeting new verticals to expand the collective reach of the contract as much as possible.</p> <p>CAI has a distinct advantage as a current Sourcewell provider. We continually develop, learn, and understand new market and technology trends through our existing clients and marketing efforts. This allows CAI to recognize a trend or change in the IT industry that will impact existing or future clients and gives us the ability to prepare for future needs prior to the customer addressing their own requirements and processes. These traits make CAI an invaluable partner – using our experience and capability to guide a customer's navigation of the IT industry as a time and cost saving exercise.</p>

37	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>CAI targets several social media platforms when developing its digital marketing strategy. We have an established presence on those most popularly used by public sector, including LinkedIn where we have over 70,000 followers.</p> <p>Facebook provides a casual but broad-reaching environment. Our Facebook business page concentrates on the visual aspect, inviting viewers to interact and 'follow' the page. It includes industry-related articles, thought leadership content, images, videos, and other items. The tone is light with Facebook, encouraging feedback and conversation, so that we can understand the audience better. https://www.facebook.com/CAIinsights/</p> <p>LinkedIn is one of the most professional social media marketing platforms. LinkedIn Groups is a great venue for entering into a professional dialog with people in similar industries; it provides a place to share content with like-minded individuals. We will encourage customers to recommend our Sourcewell offerings. Recommendations make the offerings appear more credible and reliable for new Members. CAI continues to engage with our client audience by sharing thought leadership articles, webinar replays, trending news affecting our clients, and LinkedIn Live Events where we interact live with our viewers. https://www.linkedin.com/company/cai-insights</p> <p>X (formerly known as Twitter) is the social media marketing tool that allows CAI to broadcast updates. We will follow tweeters within the Sourcewell community, industry, or related fields, to help gain new followers. We will offer a mix of official tweets about news updates with some compelling tweets, facts, and other items to appeal to the Sourcewell community. An effective way to gain a good following is to re-tweet a positive customer testimonial or quote which builds confidence in the user community. Using X as a social media marketing tool revolves around dialog and communication. https://twitter.com/CAI_Insights</p> <p>More can be found in Attachment C – Marketing Plan.</p>
38	In your view, what is Sourcewell's role in promoting contracts arising out of this RFP? How will you integrate a Sourcewell-awarded contract into your sales process?	<p>Sourcewell and CAI will act in partnership to promote the Technology Products and Services contract to the Participating Entities. With access to more than 80,000 prospective entities and doing business with 50,000 registered entities, Sourcewell can help CAI get in front of its member base to promote these services as the right choice for network compliance and security services and IT lifecycle management.</p> <p>We would look for Sourcewell - through its typical communications such as social media, exhibitions, and other outreach activities – to promote the benefits of the Service and socialize the CAI name as the prime vendor and point of contact. As a partnership, promotional activity must be two-way to be successful; Sourcewell can provide contact opportunities and CAI can drive revenue where Sourcewell will gain revenue in return.</p> <p>CAI will work with Sourcewell to develop new marketing collateral and presentations so that the Sourcewell has the right material to present the features and benefits to the security/IT organization or individual when an opportunity arises. CAI will use the existing Sourcewell Member base to reaffirm its contact list to create the opportunity to grow these services. As part of our efforts to socialize our services, on award, CAI will provide training and education for our personnel reaching all our Sales and Marketing and account teams nationwide. This will maximize the opportunity for CAI personnel to promote the new services to our clients and potential new clients.</p> <p>Our marketing team follows a standard process for campaign workflow to execute Sourcewell-related campaigns. Our campaign workflow is further highlighted in Attachment C – Marketing Plan.</p>
39	Are your products or services available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.	<p>Due to the complexity of requirements, and customized nature of these solutions, Security, Cloud, Network and Data Services and IT Lifecycle Services are not available through an e-procurement ordering process; however, we are committed to providing a white glove approach to generating scope and pricing for each member agency based on their respective needs. When speaking with customers leveraging these current services, they are appreciative of the white glove service we provide when scoping, implementing, and operating these services. Due to the complex nature of the services, customers can ask questions and receive detailed answers that are directly relevant to their respective needs to ensure proper business outcomes.</p> <p>Contact us through our website www.cai.io or directly to the contact listed in Question 8.</p>

Table 8: Value-Added Attributes

Line Item	Question	Response *
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40	<p>Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcwell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.</p>	<p>Category 2</p> <p>The following value-add services are included as a part of the managed detection and response (MDR) service:</p> <ul style="list-style-type: none"> • Assigned Investigations Manager • Active Directory Audit • Firewall Rule Audits • Adversary simulation and breach attack simulation which mimics more than 600 real-world APT attacks • Full monthly/Quarterly reviews <p>As an additional value-added service, CAI provides custom cybersecurity training for our clients, based on the audience. For example, we have a one-hour general cybersecurity training designed as an introduction to cybersecurity concepts and standards. Its four segments address:</p> <ul style="list-style-type: none"> • Understanding cybersecurity • Threats, vulnerabilities, and risk • Information and security controls (including NIST standards and examples) • Other sources of information (next steps) <p>As an additional charge, we provide penetration testing, tabletop exercises (TTXs), incident remediation assistance, and other forms of direct support. The spectrum of services includes, but is not limited to, traditional vulnerability assessments, network penetration testing, and web application testing. We also assess mobile applications and hybrid/cloud environments for vulnerability. Where appropriate, we work with clients to prevent and remediate social engineering attacks, e.g., phishing, baiting, etc. We help clients set up training programs to prevent these malicious attacks in email, text messages, etc. We also assess the physical security of client buildings and advise on best practices in the workplace. CAI is a member's one stop shop for cybersecurity services.</p> <p>Category 3</p> <p>Training is all directly or tangentially related to category 2 or 3 and the services we are offering. CAI is an Authorized Training Partner for ServiceNow. We teach 11 courses of varying duration, following a curriculum defined by ServiceNow.</p> <ul style="list-style-type: none"> • ServiceNow Administration Advanced • ServiceNow Administration Fundamentals • ServiceNow Application Development Fundamentals • ServiceNow Configuration Management Database Fundamentals • ServiceNow Hardware Asset Management Fundamentals • ServiceNow ITSM Fundamentals • ServiceNow ITSM Implementation • ServiceNow Performance Analytics Fundamentals • ServiceNow Platform Implementation • ServiceNow Project Portfolio Management (PPM) Fundamentals • ServiceNow Software Asset Management Fundamentals <p>CAI is a member's one stop shop for IT lifecycle and ServiceNow needs across the enterprise.</p>
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41	Describe any technological advances that your proposed products or services offer.	<p>Category 2</p> <p>The managed detection and response (MDR) solution is a more robust and cutting-edge solution than the outdated logs-only approach to cyber defense, as used by many Security Incident and Event Management (SIEM) systems currently in the market.</p> <p>The MDR solution architecture is a holistic, modular, fully integrated, multi-vector, and hyperconverged platform. This means that the network sensors, endpoints, deceptions, network forensic sensor, and dark web monitoring all share intelligence and context, communicating with each other to quickly validate the threat.</p> <p>The proposed MDR service provides*:</p> <ul style="list-style-type: none"> • Full validation of incidents • Network monitoring and response • Endpoint monitoring, response, and remediation and endpoint forensics • Global threat intelligence integration • Distributed and dynamic deceptions overlay • Dark web monitoring capabilities • Full logging capabilities for governance and compliance needs <p>*Provided services are dependent on specific modules purchased.</p> <p>The architecture is a modular system with seven modules, further described in Table 14B. This allows customers to purchase discrete components to satisfy their cybersecurity needs and budgets.</p> <p>Category 3</p> <p>When it comes to CAI's ServiceNow solution, CAI has over 10 years' experience implementing, supporting, and maintaining the platform. Our approach includes focusing on delivering the platform out of the box, while implementing the myriad of automation built within the platform to receive the full value and cost savings to your organization. The AI capabilities in the platform enable you to deliver relevant information, make predictions and recommendations, and automate repetitive tasks so that employees and customers can finally focus on areas humans excel at: creative thinking, customer interactions, and unpredictable work.</p> <p>ServiceNow's AI driven features in the platform improves productivity and efficiency to elevate real world experiences. These include:</p> <ul style="list-style-type: none"> • Delivery and Better Customer Service to make it easy for users to get what they need with a 24/7 Virtual Agent that understands their requests in natural language. • Detect Major Incidents Quickly and identify critical issues by proactively identifying similarities across open incidents or cases. • Route and Prioritize Work classify requests, so incidents, cases, and tasks automatically get to the right team, at the right time. • Discover Hidden Patterns to continuously group clusters of related items to uncover trends and the best opportunities for improvement. • Optimize Knowledge Bases to deflect tickets and reduce call volume by uncovering knowledge gaps and preventing duplicate content. • Quickly Identify Opportunities to Automate to end the struggle with how and when to turn-on automation solutions from ServiceNow and increase deflection while lowering mean-time-to-resolve (MTTR). • Recommend Actions and Deliver Answers to connect the dots for agents by suggesting relevant tasks and content that help them solve issues faster. • Empower Users with AI-driven searches to enable highly accurate and relevant search results for an enhanced user experience. • Supercharge Productivity to maximize the user workflow across the platform. <p>ServiceNow, Asset Management function, IT asset management (ITAM), and IT operations management (ITOM) provide an automated discovery of assets through their discovery function. This automation is able to find all assets from desktops, applications, and servers that are connected to the network creating efficiencies and automated cost savings. In addition, with the automation, the platform enables one platform with an integrated asset lifecycle that includes the entire asset lifecycle:</p> <ul style="list-style-type: none"> • Request • Purchase • Deploy • Monitor • Service • Retire
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42	Describe any "green" initiatives that relate to your company or to your products or services, and include a list of the certifying agency for each.	<p>CAI is committed to demonstrating good stewardship regarding our environment. We recognize the impact our organization and our associates can have on the environment due to our diverse locations, our resource consumption, and our interactions worldwide with individuals, businesses, and other government agencies. As an organization, CAI is committed to:</p> <ul style="list-style-type: none"> • Complying with all applicable local, state, national, and international polices as they relate to environmental management and our business practices • Integrating environmental management principles into our business plans and activities • Minimizing the impacts of our activities on the environment as much as possible • Raising awareness of, and commitment to, environmental management among our associates through recycling programs, community activities, and corporate policies • Reducing paper usage <p>CAI's current sustainability efforts include:</p> <ul style="list-style-type: none"> • While CAI does not currently have a Carbon Neutral Certification, we have a Corporate Social Responsibility (CSR) policy and participate in EcoVadis, the world's largest and most trusted provider of business sustainability ratings. CAI maintains this Sustainability Rating through our client AstraZeneca. For both 2022 and 2023, CAI has submitted an annual survey and received a rating. • CAI has decreased its physical facility footprint by 32% since 2020. • In 2020, CAI moved to a work-from-anywhere policy for corporate associates. In addition, many of CAI's clients also moved to a remote or hybrid work environment. As a result of CAI's policy change and our clients' changes, CAI has significantly reduced employee commuting, physical facility count and usage, and disposable waste; thereby significantly reducing our carbon footprint. • During the 2010s and 2020s CAI intentionally transitioned to cloud services. CAI has moved critical business operations functions, such as HR, Finance, Talent Acquisition, Customer Management, and Document Management to the cloud. This transition has significantly reduced our on-premises physical asset requirements. • The partners we have selected to provide cloud services are environmentally responsible companies, each company having science-based targets to improve their carbon footprints by the year 2030, (e.g., Workday, PPL, and Salesforce). • CAI has intentionally reduced our need for business travel by encouraging remote, video-based meetings both internally and with our clients. In addition, CAI now develops much of our marketing content to be consumed via social media channels, reducing the need for business travel or paper documents. • CAI is working towards an Environmental Sustainability program/policy by Q1 2024.
43	Identify any third-party issued eco-labels, ratings or certifications that your company has received for the equipment or products included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	CAI is not proposing any equipment or products that require eco-labels, ratings, or certifications.
44	Describe any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation of certification (as applicable) in the document upload section of your response.	We understand the significance and value of Women or Minority Business Entity (WMBE), Small Business Entity (SBE), and veteran-owned businesses as part of a government entity's approach to equal opportunities. This proposal does not involve any WMBE, SBE, or veteran-owned businesses.

45	<p>What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?</p>	<p>Category 2</p> <p>Team CAI's proposed model is consultative in nature and will be tailored to the participating entity's specific security needs. Depending on the modules chosen, the Cyber Defense Center (CDC) uses the managed detection and response (MDR) solution to continuously monitor all endpoint activity, conduct adversary hunting, validate and contain breaches, and encrypted attacks. The intrusion analysts delve deep into the inner workings of endpoints and expose anomalous behaviors. The techniques include live memory analysis, direct physical disk inspection, network traffic analysis, and endpoint state assessment. The service does not require signatures or rules. Instead, leveraging unique endpoint behavioral monitoring and advanced machine learning, it dives deep into your endpoints to better analyze and identify zero-day, new, and hidden threats that other endpoint security solutions miss entirely.</p> <p>We support Zero-Trust to provide compliance. In targeted and data breach attacks, attackers can compromise a single device within an organization, and then use the "hopping" method to move laterally across the network using stolen credentials. To meet this, our solution:</p> <ol style="list-style-type: none"> Checks for credential dumping and lateral movement. Requires that any device connecting to any organizational resources must authenticate and must be clean before access is allowed. <p>We also use endpoint sensors to check user behaviors, machine learning, and security analytics to continuously monitor the state of devices and take actions if necessary. One of the unique ways we mitigate or limit breaches is by host-isolating compromised machines regardless of location. This limits the blast radius in seconds to prevent further damage.</p> <p>We also check for different types of software usage on endpoints (approved/unapproved) and automate and share context/intelligence across the entire technology stack (endpoints/network sensors) with incident response capabilities.</p> <p>Category 3</p> <p>As the workplace continuously evolves, it is critical to keep accurate track of software, hardware, and cloud resources. CAI leverages Gartner's magic quadrant leader of end-to-end Asset Management platform, ServiceNow. The platform includes built-in best practice workflows, minimizes waste, and avoid costs for IT assets that are not being used to full capacity. Our solution helps IT teams to surface actionable insight to proactively reclaim or optimize software, hardware, and cloud resources that are not fully utilized. And because this utilization can be verified, our IT leaders are in a better position to negotiate with vendors and purchase only what the business truly needs. As a result, third party support and software maintenance costs can be reduced, along with technology debt.</p> <p>Our end-to-end Asset Management solution is unique with our enterprise solution that takes a centralized focus by integrating all assets into a CMDB on one platform that is accessible anywhere.</p> <p>With CAI's asset management service, stakeholders can improve IT efficiency by optimizing inventory to speed up employee onboarding, asset utilization, and service delivery. IT teams can also enable strategic and proactive tech refresh planning with visibility into lifecycle details to determine whether to refresh, upgrade, or sunset assets. They gain actionable insights to facilitate informed business decisions.</p> <p>Additionally, the ServiceNow platform not only enables best in class Asset Management functionality, but also provides Gartner's leading ITSM capability, enabling your assets to be linked from the incident, request, or change directly to the asset in then integrated CMDB. This enterprise integrated functionality enables organizations to manage all of their IT Operations, Incident, Assets, Security, and Project Management on one platform versus multiple different applications with limited integration.</p>
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Table 9A: Warranty

Describe in detail your manufacturer warranty program, including conditions and requirements to qualify, claims procedure, and overall structure. You may upload representative samples of your warranty materials (if applicable) in the document upload section of your response in addition to responding to the questions below.

Line Item	Question	Response *
46	Do your warranties cover all products, parts, and labor?	The offerings proposed for this contract in Category 2 and Category 3 are managed services, therefore all required maintenance and configuration of the solutions will be included at no additional cost throughout the duration of the service. As long as the service is under contract, all maintenance and support not considered enhancements will be guaranteed.
47	Do your warranties impose usage restrictions or other limitations that adversely affect coverage?	Our service/warranty does not apply to any non-conformance caused by the Member's misuse, alteration, or modification of the provided platform or software, or any other cause beyond the control of CAI. Since the Category 2 and 3 services are managed services, day-to-day operations of the service will be executed in conjunction with both CAI and the member.
48	Do your warranties cover the expense of technicians' travel time and mileage to perform warranty repairs?	If the Member notifies CAI of any non-conformance of the provided service, CAI will cover the expense to promptly correct such non-conformance as is part of the overall service offering and will be described in future contracts with each respective member agency.
49	Are there any geographic regions of the United States or Canada (as applicable) for which you cannot provide a certified technician to perform warranty repairs? How will Sourcewell participating entities in these regions be provided service for warranty repair?	CAI will fully support all geographic areas of Sourcewell participating entities. We have a nationwide presence as a company, and we are fully confident we can meet and exceed requirements across Participating Entity geographic locations.
50	Will you cover warranty service for items made by other manufacturers that are part of your proposal, or are these warranties issues typically passed on to the original equipment manufacturer?	CAI's offerings for Categories 2 and 3 are managed services in partnership with OEM software providers. As mentioned in the answer for Question 46 – as long as the service is under contract, all maintenance and support not considered enhancements will be guaranteed.
51	What are your proposed exchange and return programs and policies?	Exchange and return does not apply to the CAI services for Category 2 and 3 being proposed for this contract.
52	Describe any service contract options for the items included in your proposal.	Additional contract options are not required for the services we are providing in Category 2 and 3; however, based on respective need of the member agencies, CAI will work to ensure required options are added per respective laws/guidelines at the member level.

Table 9B: Performance Standards or Guarantees

Describe in detail your performance standards or guarantees, including conditions and requirements to qualify, claims procedure, and overall structure. You may upload representative samples of your performance materials (if applicable) in the document upload section of your response in addition to responding to the questions below.

Line Item	Question	Response *
53	Describe any performance standards or guarantees that apply to your services	Our solution operates with service level objectives (SLOs), please see the answer for Question 54 below.
54	Describe any service standards or guarantees that apply to your services (policies, metrics, KPIs, etc.)	<p>Below is a list of the most common Service Level objectives (SLOs) we see with our clients today. Our goal with our clients is to manage our effectiveness as a vendor in preventing and being responsive to security events as needed, as well as measuring the availability of the platforms which protect our clients' digital assets.</p> <p>Incident/Problem SLOs</p> <ul style="list-style-type: none"> • Urgent or Priority 1 Incident Response Time: < 1 hours • High or Priority 2 Incident Response Time: < 2 hours • Medium or Priority 3 Incident Response Time: < 7 hours • Low or Priority 4 Incident Response Time: < 24 hours • Security Incident Containment Time: < 4 hours • Security Incident Resolution Time: < 72 hours <p>Security Platform/Service SLOs</p> <ul style="list-style-type: none"> • Security System/Platform Availability: > 99.9% • Patching: > 99.0% • Service Requests (within the allotted time): > 98.0% <p>We will work with each individual member to adjust SLOs, as needed, based on their respective needs/requirements.</p>

Table 10: Payment Terms and Financing Options

Line Item	Question	Response *
55	Describe your payment terms and accepted payment methods.	CAI's standard payment terms are net 30. However, we understand that Sourcwell Participating Entities may have differing requirements for payment terms and therefore we are flexible, dependent on Entity purchasing guidelines or requirements. Payment terms will be finalized in each Participating Addendum. CAI prefers electronic payment, to ensure accuracy and expedite the process. However, we can accommodate payment by check should it be required or necessary in unusual circumstances. We can also accept P-card, and ACH payments.
56	Describe any leasing or financing options available for use by educational or governmental entities.	Not applicable to the services we are proposing.
57	Describe any standard transaction documents that you propose to use in connection with an awarded contract (order forms, terms and conditions, service level agreements, etc.). Upload a sample of each (as applicable) in the document upload section of your response.	<p>The CAI team does not have standard forms for Category 2 services due to the highly customized nature of the offering. We will work with each member to tailor the service around their respective needs for Category 2 services.</p> <p>Within Category 3 services, there is a standard order form pertaining specifically to license purchases. The order includes required terms and conditions from ServiceNow that are to be signed by the member during the license purchase process. The order form has been included as Attachment E Category 3 License Order Form.</p>
58	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcwell participating entities for using this process?	Yes. CAI can accept the P-card procurement and payment process. Fees will apply in the use of the P-card. We will work with each Sourcwell Participating Entity to understand their procurement guidelines and how the guidelines apply to transactions under the Sourcwell Contract. Applicable P-card fees will be resolved in the Participating Agreement.

Table 11: Pricing and Delivery

Provide detailed pricing information in the questions that follow below. Keep in mind that reasonable price and product adjustments can

be made during the term of an awarded Contract as described in the RFP, the template Contract, and the Sourcewell Price and Product Change Request Form.

Line Item	Question	Response *
59	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	<p>Category 2 CAI takes a consultative approach to the managed detection and response (MDR) offering due to the complexity of each Member's specific environment. Due to the variability of the environments of each Member we have structured the pricing with a series of discounts for the total amount of the annual contract value (ACV). Final pricing for each Member agency at the participating addendum level will be constructed based on specifics for each Member environment. As described throughout this response, the MDR solution is modular in nature and can be customized to fit the needs, maturity, and budget of Member agencies.</p> <p>Additional discounts will also be applied to Members that sign up for multi-year contracts.</p> <p>The cyber services presented that are ancillary and complementary to the MDR solution, i.e., penetration testing, assessments, roadmaps, etc., will be derived from the provided rate card included in Attachment A Category 2 Pricing. These services can be completed via a time and materials (T&M) or fixed price basis at the discretion of the Member entity. We will confer with each respective Member on needs and approach. The tiered discounts by ACV will also apply to the ancillary and complementary cyber services.</p> <p>Category 3 CAI's managed solution for Category 3 includes services leveraging the ServiceNow platform. We have provided a detailed rate card for roles needed to provide the service. These services can be completed via a T&M or fixed price basis at the discretion of the Member entity. Tiered discounts will apply based on the ACV of services, not including license pricing. Additional discounts will be applied to Members that sign up for multi-year contracts.</p> <p>We have also provided respective ServiceNow license pricing from the current GSA schedule pricing for 'not to exceed' prices. For Category 3 license pricing, there will be additional spot discounts at the Member level with respect to the size and needs of that individual Member.</p> <p>Our services rates and discussion on licenses are included in Attachment A Category 3 Pricing. These rates can be leveraged for IT Asset Management and complementary services, leveraging the ServiceNow platform. Services include implementation, day-to-day operations, and support/enhancements.</p> <p>Additionally, CAI offers Members the ability to purchase ServiceNow and the applicable licenses to run the entire platform, enabling full integration of end-to-end IT operations.</p> <p>ServiceNow Ancillary and Complementary Services include, but are not limited to:</p> <ul style="list-style-type: none"> • ITAM – IT Asset Management • ITOM – IT Operations Management • ITSM – IT Service Management • SPM – Strategic Portfolio Management • HR – Human Resource Case Management • SecOps – Security Case Management • CSM – Customer Service Management <p>Final pricing for each Member agency at the participating addendum level will be constructed based on specifics for each Member environment for implementation, operations, and licensing. As described throughout this response, the ServiceNow platform has many ancillary and complementary services to ITAM. The solution can be customized to fit the needs, maturity, and budget of Member agencies.</p>

60	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	CAI has provided a pricing solution based on tiered annual contract value amounts. The pricing for the Members is customized based on the type of entity, and size and specific needs of each Member agency. Therefore we have proposed a scaled discount structure ranging from 2-5% on an annual basis; increased discounts will apply for multi-year contracts. For both Category 2 and 3 services, we will leverage a white glove approach to ensure all needs are met for the Member agencies during the scoping and operations phases of the contracts.	*
61	Describe any quantity or volume discounts or rebate programs that you offer.	CAI has presented pricing discounts based on the annual contract value ranging from 2-5%. For Category 2, the larger the engagement for MDR, the greater the discount. For Category 3, we will leverage the same approach and provide discounts based on total scope of the requested service. There will also be additional discounts for multi-year contracts.	*
62	Propose a method of facilitating "sourced" products or related services, which may be referred to as "open market" items or "nonstandard options". For example, you may supply such items "at cost" or "at cost plus a percentage," or you may supply a quote for each such request.	This question does not apply to the services that are offered in this Proposal for Category 2 & 3. The components of the managed services are part of the end-to-end solution and pricing.	*
63	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	All pricing is included in Attachment A Category 2 Pricing and Attachment A Category 3 Pricing. Across both Categories 2 and 3 pricing will be customized based on respective Member needs and requested scope. All pricing will be transparent to the Member with no additional charges. We assume Sourcewell Members are tax-exempt organizations; however, if the Member is not tax-exempt, there would be additional sales taxes not included in pricing in Attachment A Category 2 Pricing and Attachment A Category 3 Pricing. We will work with each Member agency to determine their tax exemption status.	*
64	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	Freight, delivery, and shipping costs are not applicable to the services CAI is proposing on this Contract.	*
65	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	Freight, delivery, and shipping costs are not applicable to the services CAI is proposing on this Contract.	*
66	Describe any unique distribution and/or delivery methods or options offered in your proposal.	CAI's proposed model is consultative in nature and will be tailored to the Member's specific needs, and delivery is performed virtually. Question 45 has more on this unique virtual service.	*

Table 12: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
67	a. the same as the Proposer typically offers to an individual municipality, university, or school district.	Please see Attachment A – Category 2 Pricing and Attachment A – Category 3 Pricing.

Table 13: Audit and Administrative Fee

Line Item	Question	Response *
68	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed Contract with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing, that the Vendor reports all sales under the Contract each quarter, and that the Vendor remits the proper administrative fee to Sourcewell. Provide sufficient detail to support your ability to report quarterly sales to Sourcewell as described in the Contract template.	CAI has self-audit methods we use throughout our process to ensure compliance with the Sourcewell contract. The administrative fees are generated through CAI's financial system, Workday, and validated with the agreed upon administrative fee for this contract. We will leverage the same business process and auditing methods currently in place from our current Sourcewell contract to ensure compliance for Sourcewell and its participating entities.
69	If you are awarded a contract, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the contract.	With the experience of working with Sourcewell, CAI will continue to develop the internal metrics we use to measure and monitor how successful the program is and any developing trends so we can capitalize further. <ul style="list-style-type: none"> We will track the successes of our marketing efforts using metrics on the number of contacts during a marketing campaign, how many resulted in conversations and how many led to engagement of CAI and Sourcewell to deliver the services through the resulting contracts. We use Workday to track our financials. Our financial team created PowerBI reports to track growth month over month, and year over year. We produce forecasts three to six months in advance and compare our actuals against our forecasts each month. We implemented Salesforce in 2020 to manage and measure our ability to capture, retain, and grow new business opportunities. Salesforce has helped CAI refocus and strategize our approach to our clients new and old alike. Greater accountability is given to client success and satisfaction through our specific workflows. The new opportunities are reviewed and measured so that we can provide the correct level of engagement and support, to ensure we are always responsive and efficient with accountability for success held by senior management.
70	Identify a proposed administrative fee that you will pay to Sourcewell for facilitating, managing, and promoting the Sourcewell Contract in the event that you are awarded a Contract. This fee is typically calculated as a percentage of Vendor's sales under the Contract or as a per-unit fee; it is not a line-item addition to the Member's cost of goods. (See the RFP and template Contract for additional details.)	CAI is proposing a 1% Sourcewell administrative fee to be calculated as a percentage of our sales under this contract.

Table 14A: Depth and Breadth of Offered Equipment Products and Services

Proposers must designate if they are seeking an award in Category 1 only or Categories 2 and/or 3. As stated in Section II. B.1. of "REQUESTED EQUIPMENT, PRODUCTS, OR SERVICES," Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases."

Proposers submitting a proposal in Category 1 must include at least one solution in each of Categories 1, 2, and 3 within its singular proposal. For example, if a Proposer offers solutions within the scope of Category 1, 2 and 3 the Proposer should designate it is seeking an award in Category 1. Proposers seeking award in Category 2 and/or 3 must include at least one solution offered within the scope of the desired Category.

Line Item	Category 1	Category 2	Category 3
71	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No

Table 14B: Depth and Breadth of Offered Equipment Products and Services

Line Item	Question	Response *
72	Provide a detailed description of the equipment, products, and services that you are offering in your proposal.	Category 2 CAI, together with the LMNTRIX managed detection and response (MDR) platform, provides services to clients nationwide, depending on budget and cybersecurity needs. The solution provides a portal which allows staff to create, update, and

close tickets. This communications portal, an interface to the LMNTRIX MDR Grid, provides an overview of the client's entire network with the ability to cut through the static in order to respond to the highest priority threats via deep forensics and powerful collaboration tools. Please see Attachment D – MDR Communications Portal.

In addition to the MDR services (discussed in detail further down in this table), CAI provides these ancillary and complementary services:

Governance Services. Our practice is grounded in the Cybersecurity Framework (CSF) and related standards such as Payment Card Industry Data Security Standard (PCI DSS), ISO/IEC 27000, CIS controls, and ISACA Cybersecurity Maturity Model Certification (CMMC). We perform risk assessments related to IT controls. For example, we work with clients to map their processes to the relevant standards; identify potential weaknesses; and develop compliance roadmaps. We also work directly with clients to update and implement cybersecurity-related policies and procedures. For supervisory control and data acquisition (SCADA) and other industrial systems, we also apply relevant standards, e.g., North American Electric Reliability Corporation (NERC) and its critical infrastructure protection (CIP) cybersecurity reliability standards.

Technical Services. We provide penetration testing, TTXs, incident remediation assistance, and other forms of direct support. The spectrum of services includes traditional vulnerability assessments, network penetration testing, and web application testing. We also assess mobile applications and hybrid/cloud environments for vulnerability. Where appropriate, we work with clients to prevent and remediate social engineering attacks, e.g., phishing, baiting, etc. We help clients set up training programs to prevent these malicious attacks in email, text messages, etc. We also assess the physical security of client buildings and advise on best practices in the workplace.

The IBM/Poneman Institute's annual Cost of a Data Breach Report (<https://www.ibm.com/security/data-breach>) indicates the average time to detect a threat in the logs is 280+ days and the average time to remediate is 315+ days. A logs-only approach to cyber defense is outdated, as evidenced by all of the known data breaches (California DMV, CVS Health, Equifax, Home Depot, Target, Marriott Hotels, Okta, Cloudflare, Capital One Bank, etc.). All of these entities were logging everything, had multiple controls, and were unable to detect the threat in a timely manner. Threat actors were inside these large Fortune 500 level organizations on average more than eight months before being detected within the logs.

The MDR solution architecture is a holistic, modular, fully integrated, multi-vector, and hyperconverged platform. This means that our network sensors, endpoints, deceptions, network forensic sensor, and dark web monitoring all share intelligence and context. All of these sensors are communicating with each other to quickly validate the threat. The architecture is a modular system with seven modules, defined below. This allows clients to purchase discrete components to satisfy their cybersecurity needs.

DETECT Network Detection and Response (NDR) Sensor. The DETECT NDR module is deployed at all network ingress/egress (Internet) points using a Switched Port Analyzer (SPAN)/ Test Access Point (TAP) to inspect all incoming and outgoing Internet traffic. This network sensor is deployed in SPAN/TAP mode (resides behind the firewall) and monitors your internal network, critical assets, and other DMZs/ segments. The DETECT NDR sensor has 10 Engines including data leakage detection, web security, IPS, anti-malware, anti-spam, bot-detection, additional email spam detection security, threat intelligence, sandbox analysis, and web application security. We monitor inspection and blocking of malicious DNS requests, blocking based on categories, denylisting, and allowlisting. Also, we assess and monitor SQL databases, servers, and associated applications for vulnerabilities related to cross site scripting, SQL injection, and prevention of data loss.

DETECT addresses the following NIST Framework areas: DE.CM-1, DE.CM-4, DE.DP1, DE.AE-2, DE.AE-4, DE.DP-3, DE.DP-4, DE.DP-5, ID.RA-3, ID.RA-4, ID.RA-5, ID.RA-6, PR.AT-3, PR.IP-8, RS.AN-1, RS.AN-2, RS.MI-2, RS.MI-3, and RS.RP-1.

INTELLIGENCE module. INTELLIGENCE provides early warning detection through the aggregation of over 800 million Indicators of Compromise (IOCs). This threat intelligence is directly integrated into every component of the solution architecture and updated every five minutes. LMNTRIX would integrate threat intelligence application programming interface (API) into customer-owned next-gen perimeter firewalls allowing us to update the 3rd party dynamic threat feed for compatible firewalls instantly. This threat API integration with customer perimeter firewalls such as those from Fortinet, Palo Alto, Checkpoint, etc. allows us to enrich perimeter firewalls without needing to change existing firewall rules, thus providing some level

of managed firewall services. Additionally, INTELLIGENCE is also directly integrated into Infoblox/Cisco umbrella, allowing us to ensure malicious URLs do not resolve. It allows for ongoing daily operationalization of blocking known IPs or websites which are spreading malware or ransomware or are engaged in email phishing attempts. INTELLIGENCE addresses the following NIST Framework areas: DE.DP1, DE.AE-2, DE.AE-4, DE.DP-3, DE.DP-4, DE.DP-5, ID.RA-3, ID.RA-4, ID.RA-5, ID.RA-6, PR.AT-3, PR.IP-8, RS.AN-1, RS.AN-2, RS.MI-2, RS.MI-3, RS.RP-1, and ID.RA-2.

RESPOND Endpoint Detection and Response (EDR) Agent. The RESPOND EDR module is a full stack endpoint agent which provides prevention, detection, and response, as well as automated threat hunting with built-in intelligence feeds directly at every endpoint, working on-network or off-network. It is a tamper resistant agent which is a replacement for your existing AV, Next-Gen AV, EDR/EPP, or threat hunting software. The RESPOND EDR protects against ransomware and malware and allows the LMNTRIX team to host isolate endpoints immediately and to remotely respond to, contain, and remediate incidents. The RESPOND EDR also provides for virtual patching at the endpoints through our continuously updated threat intelligence, allowing internal teams more time to perform patch management. The LMNTRIX Respond EDR also forensically records information at each endpoint for retrospective hunts and analysis purposes. The EDR supports MS Windows, MacOS, Linux, and Solaris; we also provide a gold image for any VDI such as Citrix VDI and Oracle database servers.

The service does not require signatures or rules. Instead, leveraging unique endpoint behavioral monitoring and advanced machine learning (ML), the team dives deeper into the client's endpoints to better analyze and identify zero-day, new, and hidden threats that other endpoint security solutions miss entirely.

RESPOND addresses the following NIST Framework areas: DE.CM-4, DE.DP1, DE.AE-2, DE.AE-4, DE.DP-3, DE.DP-4, DE.DP-5, ID.RA-3, ID.RA-4, ID.RA-5, ID.RA-6, PR.AT-3, PR.IP-8, RS.AN-1, RS.AN-2, RS.MI-2, RS.MI-3, RS.RP-1, PR.DS-5, RS.MI-1, and RS.MI-2.

ThinkGrid SIEM. ThinkGrid is a replacement for your logging/Security Incident and Event Management (SIEM) needs as it uses a big data search and analytics engine enabling scalability, reliance, and extremely simple management. This is a fully managed, cloud deployed software and service. By allowing scalable and unlimited log collection, ThinkGrid is ideal for large log management and compliance use cases. ThinkGrid uses machine learning algorithms, threat intelligence/reputational feeds, and graph analysis to identify abstract relationships, anomalies, and trends. Primary use cases are excessive log management, log retention, search, analytics, and compliance. ThinkGrid is a cloud based SIEM and can retain data for any amount of time required for compliance (1 year, 3 years, 7 years, etc.). LMNTRIX's MDR service does not need nor uses a SIEM for detection and response, thus allowing ThinkGrid to be focused exclusively on log collection and retention for compliance and regulatory requirements.

ThinkGrid addresses the following NIST Framework areas: DE.DP1, DE.AE-2, DE.AE-3, DE.AE-4, DE.DP-3, DE.DP-4, DE.DP-5, ID.RA-3, ID.RA-4, ID.RA-5, ID.RA-6, PR.AT-3, PR.IP-8, RS.AN-1, RS.AN-2, RS.MI-2, RS.MI-3, and RS.RP-1.

DECEIVE Dynamic and Distributed Deceptions. DECEIVE enshrouds your entire network – from every endpoint to every server and network component – in a deceptive parallel universe. From the instant an attacker penetrates your network, all they can see is an elusive mirage where every single data packet is unreliable. It is a post breach strategy to consistently detect the presence of human adversaries on customer networks with little to no false positives. There are four components to the DECEIVE module which include decoys, breadcrumbs, tags, and personas. Each is designed to address a different insider threat and human adversary threat type; together they form a powerful defense.

DECEIVE addresses the following NIST Framework areas: DE.DP1, DE.AE-2, DE.AE-4, DE.DP-3, DE.DP-4, DE.DP-5, ID.RA-3, ID.RA-4, ID.RA-5, ID.RA-6, PR.AT-3, PR.IP-8, RS.AN-1, RS.AN-2, RS.MI-2, RS.MI-3, and RS.RP-1.

Packets Hunt Network Sensor. The Packets Hunt is a Network Forensics Sensor deployed using a TAP or SPAN session across the environment, providing network packet capture for full fidelity network forensics. Packets Hunt detects threats in real time and automatically replays stored packets to discover previously unknown threats through the correlation of proprietary research intelligence, machine learning, flow-based traffic algorithms, and multiple third-party threat intelligence feeds. Packets Hunt allows for daily forensics, automated retrospection (looking backwards in time), and automated network hunting and network containment.

Packets Hunt addresses the following NIST Framework areas: DE.CM-4, DE.DP1, DE.AE-2, DE.AE-4, DE.DP-3, DE.DP-4, DE.DP-5, ID.RA-3, ID.RA-4, ID.RA-5, ID.RA-6, PR.AT-3, PR.IP-8, RS.AN-1, RS.AN-2, RS.MI-2, RS.MI-3, RS.RP-1, and RS.AN-3.

RECON Dark/Deep Web Monitoring. RECON is a service that delivers powerful early warnings of hacking and fraud attacks via a sophisticated cyber intelligence operation. Scanning a wide range of sources (e.g., deep and dark web, cyber-

crime forums, Internet Relay Chat (IRC) channels, social media, app stores, paste sites), it provides near-real-time alerts about cyber-threats. By converting security intelligence into actionable data, the RECON platform enables our customers to detect unknown threats and minimize their dangerous exposure.

Mobile Endpoint Security. Mobile Security is an advanced mobile threat defense solution for enterprises, providing persistent, on-device protection to both corporate-owned and BYOD devices. Mobile Security detects threats across the kill chain: device, network, phishing, and application attacks. No matter the mobile device, from tablet to phones, Mobile Security provides complete security coverage across Android, iOS, and ChromeOS.

Comprehensive device attribution enables enterprises to have a complete picture of their mobile endpoint security and shores up zero trust architectures. On-device, machine learning-based detection provides prevention against the latest mobile threats, including zero-day malware. Mobile Security detects both known and unknown threats, including zero-day, phishing, and network attacks, by analyzing slight deviations to a mobile device's various system parameters. Once deployed on a mobile device, Mobile Security begins protecting the device against all primary attack vectors, even when the device is not connected to a network. Mobile Security covers iPads, iPhones, Chromebooks, and Android phones.

Mobile Endpoint Security addresses the following NIST Framework areas: AU-9, CM-11, CM-7, IA-3, MP-6, MP-7, SA-13, SA-13, SC-11, SC-28, SC-3, SI-3, SI-4, and SI-7.

Cloud Security. This service correlates cloud security posture management with actual runtime events to uncover breaches as they occur. It monitors the full runtime picture of dynamic threats and alerts the client only when there is an actual threat to remediate. The service finds static and dynamic activities using rule- and ML-based detectors to understand personalized, relevant behavior in "peacetime" and finds contextual threats at runtime. The service uses APIs to ingest direct run-time data and events and correlates logs and activities from any cloud/any source. When detecting a potential threat, it creates a single storyline for related events, thereby mitigating false positives and saving significant time. Cloud Security also address compliance, governance, and visibility. The service provides all of the following:

- Cloud Security Posture Management

Provides compliance verification, governance enforcement, misconfiguration detection, excessive permissions checking, and other standard CSPM functions.

- Cloud Detection and Response

Detects malicious behavior by learning over time to focus not on what is suspicious, but what is suspicious and relevant.

- Cloud Infrastructure Entitlement Management

Extends zero trust beyond monitoring basic user access to focus on access attempts that represent anomalous behavior, i.e., filtering.

Cloud Security combines cloud network observability and identity threat detection into a single process, thereby helping expose anomalies that other services miss. It also provides cross-cloud visibility into exploits in real time and enables the MDR team to act immediately, in contrast to other investigations that may take days to validate.

The Cloud Security platform "listens" to the activity during peacetime to determine what is normal behavior. It creates baseline ML models for users, clouds, roles, and applications, which then triangulate behavior in the runtime and flag deviations. These contextualize deviations as validated incidents, making it easy to identify threat actors. Remediation addresses misconfigurations, compliance issues, and other public exposures. Threat response addresses real-time prevention for runtime events. Additional custom rules will be created by the team and only execute when all the criteria for execution are met. Attacks are not comprised of one mega event; they are made up of several smaller activities. We leverage AI and ML to correlate activities and clearly show how an attack is unfolding in a strategic and sequenced manner for advanced root cause analysis.

CAI is well-equipped to serve as a cybersecurity partner for participating entities given our strong background in supporting local government organizations. We currently provide cybersecurity services to local government agencies across the country; some of our successes with these clients include developing cybersecurity strategy, assessing current cyber maturity, identifying gaps, developing road maps and remediation plans, creating IR plans, conducting TTXs, operating MDR services, and optimizing IT infrastructure.

CAI is a thought leader in the cybersecurity industry and has produced articles on various topics, including A Breakdown of the Presidential Cyber Executive Order; the National Cybersecurity Strategy; protecting operational technology (OT); and TSA updates. These articles can be found on our website: <https://www.cai.io/services/cybersecurity>.

		<p>Category 3 CAI is proposing IT Lifecycle Services, including IT asset management services, IT data center decommissioning, and IT asset disposal. For IT asset management we are partnering with ServiceNow, a Leader in the Gartner Magic Quadrant.</p> <p>CAI's partnership with ServiceNow is highly robust and extremely productive. Our ServiceNow offerings include:</p> <ul style="list-style-type: none"> • Platform Support and Extension • Platform Development • Version Upgrades • Security Operations • Implementation Services • Health Check Assessments • Consulting Services • End User Training • Authorized Training Partner • Authorized License Reselling <p>For all partners, ServiceNow maintains a publicly available website summarizing the capabilities and competence of the firm. CAI's profile appears at the following link: https://www.servicenow.com/partners/partner-finder/computer-aid-inc.html.</p> <p>Our customer satisfaction score is 4.5/5. This is the experience we will leverage in supporting Sourcewell and its Members. The offering also includes ancillary and complementary ServiceNow services that span the Member agencies enterprise, which are shown below.</p> <ul style="list-style-type: none"> • ITAM – IT Asset Management • ITOM – IT Operations Management • ITSM – IT Service Management • SPM – Strategic Portfolio Management • HR – Human Resource Case Management • SecOps – Security Case Management • CSM – Customer Service Management
73	Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.	N/A, the services are described previously in Question 72.

Table 15A: Category 1 - Depth and Breadth of Offered Equipment Products and Services

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

Line Item	Category or Type	Offered *	Comments
74	Computer hardware, including desktops, laptops, tablets, and related devices;	<input type="radio"/> Yes <input checked="" type="radio"/> No	
75	Networking, server, and data storage equipment, including servers, server appliances, racks and cabinets, data storage or data protection devices, and switching technology;	<input type="radio"/> Yes <input checked="" type="radio"/> No	
76	Peripherals, accessories, components, and options, including printers, scanners, monitors, audio visual, digital signage, virtual reality, Esports equipment, unified communication hardware, mobility hardware, cabling, modems, routers, switches, power management, and supplies;	<input type="radio"/> Yes <input checked="" type="radio"/> No	
77	Software related to the purchase of the equipment described in Lines 74-76 above;	<input type="radio"/> Yes <input checked="" type="radio"/> No	
78	Configuration, software implementation, hardware installation, support, assessment, training, and asset lifecycle services related to the purchase of the equipment or software described in Lines 74-77 above; and	<input type="radio"/> Yes <input checked="" type="radio"/> No	
79	Security, cloud, network, data, IT asset lifecycle services, and solutions described in Categories 2 and 3.	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Table 15B: Category 1 - Industry Specific Questions

Table 15B: Industry Specific Questions relate to products and services offered in Category 1 (see Table 15A).

Line Item	Question	Response
80	Describe your capability to report Sourcewell member purchases of products with environmentally preferred attributes (e.g., eco-labeled, rated, or certified).	N/A
81	Identify any reseller certification(s) (or similar third-party validation of technical expertise) that your organization has attained, if any.	N/A
82	Describe your maintenance solutions for software products, such as maintenance agreements, software upgrades, continuous updates, patches, and fixes.	N/A
83	Describe your website and the ease-of-use for customers, including order placement, payment, order tracking, etc.	N/A

Table 16A: Category 2 - Depth and Breadth of Offered Equipment Products and Services

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

Line Item	Category or Type	Offered *	Comments
84	Cybersecurity services, such as cyber risk assessments, program strategy and operations, zero trust, skills and training, penetration testing, threat and vulnerability management, content security, network visibility and endpoint detection, log aggregation and correlation, disaster response and recovery, and managed cybersecurity;	<input checked="" type="radio"/> Yes <input type="radio"/> No	CAI offers cybersecurity services through cyber risk assessments, strategy development, zero trust implementation, skills training, penetration testing, and threat management. We also ensure content security, network visibility, endpoint detection, log correlation, disaster recovery, and managed cybersecurity for robust client protection.
85	Physical security services, such as site assessment, upgrade planning and execution design, installation, integration, access control, video management, and managed physical security services;	<input checked="" type="radio"/> Yes <input type="radio"/> No	CAI offers security site assessments, access control, and advisement.
86	Cloud, such as Infrastructure as a Service (IaaS), Platform as a Service (PaaS), Software as a Service (SaaS), and strategy, design, migration, deployment, and managed cloud solutions;	<input checked="" type="radio"/> Yes <input type="radio"/> No	Our MDR solution is PaaS and SaaS within a managed service, as described in answers throughout our response.
87	Network, such as maintenance and monitoring, edge computing, SD-WAN and LAN, and data center networking;	<input checked="" type="radio"/> Yes <input type="radio"/> No	Our MDR solution covers requests for this category.
88	Data, such as data modernization, data backup, data and document processing and storage, and assessment, validation, production, and management of AI and machine learning solutions; and	<input checked="" type="radio"/> Yes <input type="radio"/> No	Our MDR solution covers requests for this category.
89	Related solutions, such as endpoint security products, network security technologies, identity and access management technologies, security analytics, data security products, IP video monitoring systems, intelligent controllers, mission control systems, electronic locks, network infrastructure, and server room technology.	<input checked="" type="radio"/> Yes <input type="radio"/> No	Our MDR solution covers requests for this category.

Table 16B: Category 2 - Industry Specific Questions

Table 16B: Industry Specific Questions relate to products and services offered in Category 2 (see Table 16A).

Line Item	Question	Response
90	Describe how you help organizations with their zero-trust programs, if applicable.	<p>We support Zero-Trust to provide compliance. In targeted and data breach attacks, attackers can compromise a single device within an organization, and then use the "hopping" method to move laterally across the network using stolen credentials. To meet this our solution:</p> <ul style="list-style-type: none"> a. Checks for credential dumping and lateral movement b. Requires that any device connecting to any organizational resources must authenticate and must be clean before access is allowed <p>We also use endpoint sensors to check user behaviors, machine learning, and security analytics to continuously monitor the state of devices and take actions if necessary. One of the unique ways we mitigate, or limit breaches is by host isolating compromised machines regardless of location. This limits the blast radius in seconds to prevent further damage.</p> <p>We also check for different types of software usage on endpoints (approved/unapproved) and automate and share context/intelligence across the entire technology stack (endpoints/network sensors) with incident response capabilities.</p>
91	Describe how you deliver cybersecurity solutions in accordance with the National Institute of Standards and Technology (NIST) framework, if applicable.	<p>CAI uses the National Institute of Standards and Technology's Cybersecurity Framework (NIST CSF) as the standard for our approach along with other key frameworks and practices. NIST CSF was published in February 2014 in response to Presidential Executive Order 13636, "Improving Critical Infrastructure Cybersecurity," which called for a standardized security framework for critical infrastructure in the United States. The CSF integrates current standards and best practices to help organizations manage their cybersecurity risks.</p> <p>To complement NIST CSF and the other standards, CAI considers three key elements to a cybersecurity program, discussed below:</p> <p>Governance is how an organization directs, controls, and executes a vulnerability management strategy. Critical elements include executive support, alignment with strategic objectives, and clear operational guidelines understood by all stakeholders. Governance allows an organization to execute a clear plan, outlines actions, defines responsibilities, and authorizes decisions.</p> <p>Technical refers to the organization's infrastructure capability to withstand cybersecurity threats over time and protect key data and assets as users and systems interact. Specifically, to examine the technology's capability to monitor, protect, and remediate vulnerabilities.</p> <p>Operations and Services considers how the organization functions putting the governance and technology elements into action. It is the control of the program and how it is put into practice. Leveraging these three allows us to take a holistic look at an organization's risk by focusing on protecting the most sensitive data, maintaining operations, and tracking the current threat landscape.</p> <p>Team CAI is the best choice for the Sourcewell Members. Team CAI is responsive and will tailor a network compliance and security solution to specific Members.</p>

92	Please list any certifications or testing results you or your partner(s) hold which show security posture in your proposed solutions, if applicable.	<p>Our security service team members' certifications include all of the following:</p> <ul style="list-style-type: none"> • Certified Information Security Professional (CISSP) • Offensive Security Certified Professional (OSCP) • Certified Ethical Hacker (CEH) • Certified Information Systems Auditor (CISA) • Certified Information Security Manager (CISM) • Project Management Professional (PMP) • Certified Information Privacy Professional (CIPT) • Certified Business Continuity Professional (CBCP) • CompTIA Security+, Project+, Linux+, Network+, A+ • AWS Security, Solution Architect, Cloud Practitioner • Cisco Certified Internetwork Expert (CCIE) • Global Information Assurance Certification (GIAC) • SANS Institute GIAC Cyber Threat Intelligence (SANS GCTI) • Certified Cloud Security Professional (CCSP) • Global Information Assurance Certification (GIAC) Certified Forensic Analyst (GCFA) • GIAC Certified Forensic Examiner (GCFE) • GIAC Reverse Engineering Malware (GREM) • GIAC Network Forensic Analyst (GNFA) • CyberSecurity Institute CyberSecurity Forensic Analyst (CSFA) • eLearnSecurity Certified Reverse Engineer (eCRE) <p>Organizational certifications:</p> <ul style="list-style-type: none"> • We follow the Statement on Standards for Attestation Engagements (SSAE) 18 by the American Institute of Certified Public Accountants (AICPA) for business process audits, including the System and Organization Controls (SOC) report. Our most recent audit is a SOC 2 Type 1 for the period ending September 30, 2022. The report was finalized in December 2022. The scope of CAI services subject to the audit include application support outsourcing, remote help desk and call center services, and the business/technical infrastructure relative to these CAI services. • Our partner LMNTRIX is PCI-DSS, SOC2 Type 1, and ISO27001 certified.
93	Describe how you deliver cloud solutions in accordance with the NIST definition of cloud computing, if applicable.	Our cloud solutions and services capitalize on our PaaS/SaaS providers (AWS, Azure, ServiceNow) existing NIST controls and compliance. Each of these provide follow the compliance of various NIST frameworks and are also FedRAMP compliant.
94	Describe which deployment methods you provide cloud-based services (e.g., private cloud, community cloud, public cloud, or hybrid cloud), if applicable.	With our cloud-based services, we provide various deployment methods that include public, private, and hybrid cloud. We would look at each use case individually to determine what the best method of deployment is to ensure the most efficient and secure model.

Table 17A: Category 3 - Depth and Breadth of Offered Equipment Products and Services

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

Line Item	Category or Type	Offered *	Comments
95	IT Asset Management Services, including hardware and software asset management, software as a service management, audit management, maturity assessments, sustainability solutions, and repair and maintenance;	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>CAI provides full lifecycle asset management including implementation and support services of the leading Gartner Magic Quadrant platform, ServiceNow. Our services include:</p> <ul style="list-style-type: none"> • Asset Inventory Management • Asset Maintenance – Deploying, Maintenance, and Upgrading • Asset Disposal • Asset Maturity Assessments <p>ServiceNow Asset Management Implementations:</p> <ul style="list-style-type: none"> • ITAM – Primary Asset Management Module • ITOM – Asset Automatic Discovery • CMDB – Configuration Management Database • Integrations – Asset Management integrations to 3rd party application <p>Additional ServiceNow Implementations that are ancillary and complementary to Asset Management include, but not limited to:</p> <ul style="list-style-type: none"> • ITSM – Incident, Request, Problem, Change • SecOps – Security Incident and Vulnerability Management • SPM – Strategic Portfolio Management • HR – Case Management • CSM – Customer Service Management
96	IT datacenter decommissioning, including planning and valuation, data shredding, de-racking, de-cabling, de-powering, and packing; and,	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>CAI provides datacenter decommissioning services which include:</p> <ul style="list-style-type: none"> • Asset Inventory • Hardware Decommissioning • Moving and Packing • Data Destruction • Recycling and Disposal
97	IT Asset Disposal and Retirement Services, including secure data destruction, serialization, asset value recovery, recycling, remarketing, refurbishing, onsite collection, and ESG reporting.	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>CAI follows guidelines NIST 800-53 and NIST 800-88 for hard drive disposal.</p>

Table 178: Category 3 - Industry Specific Questions

Table 17B: Industry Specific Questions relate to products and services offered in Category 3 (see Table 17A).

Line Item	Question	Response
98	Please list any certifications your company or your delivery partner(s) hold which are relevant to IT Asset Lifecycle Services, such as R2v3, e-Stewards, NAID AAA, ISO 9001, ISO 14001, ISO 45001, and ITAM Forum.	<p>CAI is a member of the International Association of Information Technology Managers (IAITAM) and holds two certifications with them: Certified Asset Management Professional (CAMP) and Certified Software Asset Manager (CSAM).</p> <p>CAI also holds ServiceNow Asset Management certifications that include:</p> <ul style="list-style-type: none"> • Software Asset Management Implementation • Hardware Asset Management Implementation • Asset Discovery • Service Mapping • ITSM Implementation <p>While we have chosen not to pursue specific certifications such as R2v3, e-Stewards, NAID AAA, ISO 9001, ISO 14001, ISO 45001, and ITAM Forum at this time, our operations and practices align or exceed these standards. Both CAI and our delivery partners continuously strive to uphold the best industry practices, ensuring the utmost quality, environmental responsibility, occupational health and safety, and information security.</p>
99	Please indicate the standards to which hard drives are wiped, such as the Department of Defense or NIST standard 800-88.	CAI follows guidelines NIST 800-53 and NIST 800-88 for hard drive disposal.

Exceptions to Terms, Conditions, or Specifications Form

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

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

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."

- [Financial Strength and Stability](#) - Attachment_B_Letter_of_Financial_Rep_CAI.pdf - Monday December 18, 2023 16:27:47
- [Marketing Plan/Samples](#) - Attachment_C_CAI_Marketing_Plan_CAI.pdf - Monday December 18, 2023 16:28:28
- WMBE/MBE/SBE or Related Certificates (optional)
- Warranty Information (optional)
- [Standard Transaction Document Samples](#) - Attachment_E_Category_3_License_Order_Form_CAI.pdf - Monday December 18, 2023 16:33:34
- [Requested Exceptions](#) - RFP_121923_Technology_Products_Contract_CAI_redlines.docx - Monday December 18, 2023 16:31:37
- [Upload Additional Document](#) - Attachment_D_MDR_Communications_Portal_CAI.pdf - Monday December 18, 2023 16:29:15
- Pricing - Category 1 (optional)
- [Pricing - Category 2](#) - Attachment_A_Category_2_Pricing_CAI.pdf - Monday December 18, 2023 16:29:31
- [Pricing - Category 3](#) - Attachment_A_Category_3_Pricing_CAI.pdf - Monday December 18, 2023 16:30:06

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT AND ASSURANCE OF COMPLIANCE

I certify that I am the authorized representative of the Proposer submitting the foregoing Proposal with the legal authority to bind the Proposer to this Affidavit and Assurance of Compliance:

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 contract award.
3. The Proposer, including any person assisting with the creation of this Proposal, has arrived at this Proposal independently and the Proposal has been created without colluding with any other person, company, or parties that have or will submit a proposal under this solicitation; and the Proposal has in all respects been created fairly without any fraud or dishonesty. The Proposer has not directly or indirectly entered into any agreement or arrangement with any person or business in an effort to influence any part of this solicitation or operations of a resulting contract; and the Proposer has not taken any action in restraint of free trade or competitiveness in connection with this solicitation. Additionally, if Proposer has worked with a consultant on the Proposal, the consultant (an individual or a company) has not assisted any other entity that has submitted or will submit a proposal for this solicitation.
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 exists when a vendor has an unfair competitive advantage or the vendor's objectivity in performing the contract is, or might be, impaired.
5. The contents of the Proposal have not been communicated by the Proposer or its employees or agents to any person not an employee or legally authorized agent of the Proposer and will not be communicated to any such persons prior to Due Date of this solicitation.
6. If awarded a contract, the Proposer will provide to Sourcewell Participating Entities the equipment, products, and services in accordance with the terms, conditions, and scope of a resulting contract.
7. The Proposer possesses, or will possess before delivering any equipment, products, or services, all applicable licenses or certifications necessary to deliver such equipment, products, or services under any resulting contract.
8. The Proposer agrees to deliver equipment, products, and services through valid contracts, purchase orders, or means that are acceptable to Sourcewell Members. Unless otherwise agreed to, the Proposer must provide only new and first-quality products and related services to Sourcewell Members under an awarded Contract.
9. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
10. The Proposer understands that Sourcewell will reject RFP proposals that are marked "confidential" (or "nonpublic," etc.), either substantially or in their entirety. Under Minnesota Statutes Section 13.591, subdivision 4, all proposals are considered nonpublic data until the evaluation is complete and a Contract is awarded. At that point, proposals become public data. Minnesota Statutes Section 13.37 permits only certain narrowly defined data to be considered a "trade secret," and thus nonpublic data under Minnesota's Data Practices Act.
11. 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 or the Canadian 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. - D. Abraham Hunter, Executive Vice President, Computer Aid, Inc.

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

Yes No

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

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

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum_17_Technology_Products_and_Services Tue December 12 2023 03:16 PM	<input checked="" type="checkbox"/>	6
Addendum_16_Technology_Products_and_Services Thu December 7 2023 03:22 PM	<input checked="" type="checkbox"/>	1
Addendum_15_Technology_Products_and_Services Wed December 6 2023 04:12 PM	<input checked="" type="checkbox"/>	4
Addendum_14_Technology_Products_and_Services Tue December 5 2023 07:50 AM	<input checked="" type="checkbox"/>	2
Addendum_13_Technology_Products_and_Services Fri December 1 2023 01:49 PM	<input checked="" type="checkbox"/>	3
Addendum_12_Technology_Products_and_Services Thu November 30 2023 02:56 PM	<input checked="" type="checkbox"/>	2
Addendum_11_Technology_Products_and_Services Tue November 28 2023 02:59 PM	<input checked="" type="checkbox"/>	1
Addendum_10_Technology_Products_and_Services Mon November 27 2023 02:37 PM	<input checked="" type="checkbox"/>	3
Addendum_9_Technology_Products_and_Services Wed November 22 2023 09:01 AM	<input checked="" type="checkbox"/>	1
Addendum_8_Technology_Products_and_Services Mon November 20 2023 04:30 PM	<input checked="" type="checkbox"/>	2
Addendum_7_Technology_Products_and_Services Wed November 15 2023 03:37 PM	<input checked="" type="checkbox"/>	4
Addendum_6_Technology_Products_and_Services Thu November 9 2023 03:02 PM	<input checked="" type="checkbox"/>	2
Addendum_5_Technology_Products_and_Services Wed November 8 2023 03:28 PM	<input checked="" type="checkbox"/>	2
Addendum_4_Technology_Products_and_Services Tue November 7 2023 02:33 PM	<input checked="" type="checkbox"/>	3
Addendum_3_Technology_Products_and_Services Fri November 3 2023 02:06 PM	<input checked="" type="checkbox"/>	2
Addendum_2_Technology_Products_and_Services Thu November 2 2023 03:08 PM	<input checked="" type="checkbox"/>	1
Addendum_1_Technology_Products_and_Services Tue October 31 2023 03:29 PM	<input checked="" type="checkbox"/>	1