

**Solicitation Number: RFP #020421****CONTRACT**

This Contract is between Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and ALPHA Facilities Solutions, LLC, 4085 Cibolo Canyons, Suite 200, San Antonio, TX 78261 (Vendor).

Sourcewell is a State of Minnesota local government agency 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 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 Facility Assessment and Planning with Related Services from which Vendor was awarded a contract.

Vendor 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.
- B. **EXPIRATION DATE AND EXTENSION.** This Contract expires March 24, 2025, unless it is cancelled sooner pursuant to Article 22. This Contract may be extended up to one additional one-year period upon request of Sourcewell and with written agreement by Vendor.
- C. **SURVIVAL OF TERMS.** Articles 11 through 14 survive the expiration or cancellation of this Contract.

**2. EQUIPMENT, PRODUCTS, OR SERVICES**

- A. **EQUIPMENT, PRODUCTS, OR SERVICES.** Vendor will provide the Equipment, Products, or Services as stated in its Proposal submitted under the Solicitation Number listed above. Vendor'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/current model. Vendor may offer close-out or refurbished Equipment or Products if they are clearly indicated in Vendor'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.** Vendor 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, Vendor warrants the Equipment, Products, and Services are suitable for and will perform in accordance with the ordinary use for which they are intended. Vendor'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 is effective past the expiration of the Vendor's warranty will be passed on to the Participating Entity.

C. **DEALERS, DISTRIBUTORS, AND/OR RESELLERS.** Upon Contract execution, Vendor will make available to Sourcewell a means to validate or authenticate Vendor's authorized dealers, distributors, and/or resellers relative to the Equipment, Products, and Services related to this Contract. This list may be updated from time-to-time and is incorporated into this Contract by reference. It is the Vendor's responsibility to ensure Sourcewell receives the most current version of this list.

### **3. PRICING**

All Equipment, Products, or Services under this Contract will be priced as stated in Vendor'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, Vendor 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.

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

Sourcwell may declare the Vendor in breach of this Contract if the Vendor intentionally delivers substandard or inferior Equipment or Products. In the event of the delivery of nonconforming Equipment and Products, the Participating Entity will notify the Vendor as soon as possible and the Vendor will replace nonconforming Equipment and Products with conforming Equipment and Products that are acceptable to the Participating Entity.

B. SALES TAX. Each Participating Entity is responsible for supplying the Vendor 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, Vendor may offer a specific selection of Equipment, Products, or Services at discounts greater than those listed in the Contract. When Vendor determines it will offer Hot List Pricing, it must be submitted electronically to Sourcwell in a line-item format. Equipment, Products, or Services may be added or removed from the Hot List at any time through a Sourcwell 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**

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

- Identify the applicable Sourcwell 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 Request Form will become an amendment to this Contract and 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. Vendor 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.

Vendor 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. Vendor's employees may be required to perform work at government-owned facilities, including schools. Vendor'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 Vendor that it intends to access this Contract; however, order flow and procedure will be developed jointly between Sourcewell and Vendor. Typically, a Participating Entity will issue an order directly to Vendor. 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 of this Contract; however, Vendor performance, Participating Entity payment, and any applicable warranty periods or other Vendor or Participating Entity obligations may extend beyond the term of this Contract.

Vendor's acceptable forms of payment are included in Attachment A. 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 Vendor, 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 worked out directly between the Participating Entity and the Vendor. 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 (such as e-commerce specifications, specialized delivery requirements, or other specifications and requirements) not addressed in this Contract, the Participating Entity and the Vendor 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 Vendor 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 goods to be purchased;
2. Federal, state, or provincial laws or regulations prohibit the purchase or change the Participating Entity's requirements; or
3. Vendor commits any material breach of this Contract or the additional terms agreed to between the Vendor and a Participating Entity.

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.** Vendor 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. Vendor must perform a minimum of one business review with Sourcwell per contract year. The business review will cover sales to Participating Entities, pricing and contract terms, administrative fees, 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, Vendor must provide a contract sales activity report (Report) to the Sourcwell Contract Administrator assigned to this Contract. A Report must be provided regardless of the number or amount of sales during that quarter (i.e., if there are no sales, Vendor must submit a report indicating no sales were made).

The Report must contain the following fields:

- Customer Name (e.g., City of Staples Highway Department);
- Customer Physical Street Address;
- Customer City;
- Customer State/Province;
- Customer Zip Code;
- Customer Contact Name;
- Customer Contact Email Address;
- Customer Contact Telephone Number;
- Sourcwell Assigned Entity/Participating Entity Number;
- Item Purchased Description;
- Item Purchased Price;
- Sourcwell Administrative Fee Applied; and
- Date Purchase was invoiced/sale was recognized as revenue by Vendor.

B. ADMINISTRATIVE FEE. In consideration for the support and services provided by Sourcwell, the Vendor will pay an administrative fee to Sourcwell on all Equipment, Products, and Services provided to Participating Entities. The Administrative Fee must be included in, and not added to, the pricing. Vendor may not charge Participating Entities more than the contracted price to offset the Administrative Fee.

The Vendor will submit payment to Sourcwell 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 Vendor's name and Sourcwell-assigned contract number in the memo; and must be mailed to the address above "Attn: Accounts Receivable" or remitted electronically to Sourcwell's banking institution per Sourcwell's Finance department instructions. Payments must be received no later than 45 calendar days after the end of each calendar quarter.

Vendor 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 Vendor is delinquent in any undisputed administrative fees, Sourcewell reserves the right to cancel this Contract and reject any proposal submitted by the Vendor 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.

Vendor's Authorized Representative is the person named in the Vendor's Proposal. If Vendor's Authorized Representative changes at any time during this Contract, Vendor 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 this Agreement 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 the Vendor nor Sourcewell may assign or transfer any rights or obligations under this Contract without the prior consent of the parties and a fully executed assignment agreement. Such consent will not be unreasonably withheld.

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

D. **WAIVER.** If either party fails to enforce any provision of this Contract, that failure does not waive the provision or the right to enforce it.

E. **CONTRACT COMPLETE.** This Contract contains all negotiations and agreements between Sourcewell and Vendor. 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, 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. LIABILITY

Vendor must indemnify, save, and hold Sourcewell and its Participating Entities, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees, arising out of the performance of this Contract by the Vendor 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.

## 12. GOVERNMENT DATA PRACTICES

Vendor 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, stored, used, maintained, or disseminated by the Vendor under this Contract.

If the Vendor receives a request to release the data referred to in this article, the Vendor must immediately notify Sourcewell and Sourcewell will assist with how the Vendor should respond to the request.

## 13. INTELLECTUAL PROPERTY, PUBLICITY, MARKETING, AND ENDORSEMENT

### A. INTELLECTUAL PROPERTY

1. *Grant of License.* During the term of this Contract:
  - a. Sourcewell grants to Vendor a royalty-free, worldwide, non-exclusive right and license to use the Trademark(s) provided to Vendor by Sourcewell in advertising and promotional materials for the purpose of marketing Sourcewell's relationship with Vendor.
  - b. Vendor grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Vendor's Trademarks in advertising and promotional materials for the purpose of marketing Vendor'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 its and their respective distributors, 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. Sourcewell must not alter Vendor's Trademarks from the form provided by Vendor and must comply with Vendor's removal requests as to specific uses of its trademarks or logos.
  - b. Vendor must not alter Sourcewell's Trademarks from the form provided by Sourcewell and must comply with Sourcewell's removal requests as to specific uses of its trademarks or logos.
  - c. 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. As applicable, Vendor agrees to indemnify and hold harmless Sourcewell and its Participating Entities against any and all suits, claims, judgments, and costs instituted or recovered against Sourcewell or Participating Entities by any person on account of the use of any Equipment or Products by Sourcewell or its Participating Entities supplied by Vendor in violation of applicable patent or copyright laws.
5. *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 vendors which may be used until the next printing). Vendor 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 Vendor 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. Materials should be sent to the Sourcewell Contract Administrator assigned to this Contract.

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

#### **14. GOVERNING LAW, JURISDICTION, AND VENUE**

Minnesota law governs this Contract. Venue for all legal proceedings out of this Contract, or its breach, must be in the appropriate state court in Todd County 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 to be illegal, unenforceable, or void then both Sourcewell and Vendor will be relieved of all obligations arising under such provisions. If the remainder of this Contract is capable of performance, it will not be affected by such declaration 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 Vendor 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 Vendor may escalate the resolution of the issue to a higher level of management. The Vendor will have 30 calendar days to cure an outstanding issue.
3. *Performance while Dispute is Pending.* Notwithstanding the existence of a dispute, the Vendor must continue without delay to carry out all of its responsibilities under the Contract that are not affected by the dispute. If the Vendor fails to continue without delay to perform its responsibilities under the Contract, in the accomplishment of all undisputed work, any additional costs incurred by Sourcewell and/or its Participating Entities as a result of such failure to proceed will be borne by the Vendor.

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.

Written notice of default and a reasonable opportunity to cure must be issued by the party claiming 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, Vendor 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.* Vendor 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-Completed operations

\$2,000,000 general aggregate

3. *Commercial Automobile Liability Insurance.* During the term of this Contract, Vendor 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, Vendor will maintain umbrella coverage over Workers' Compensation, 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, Vendor will maintain coverage for all claims the Vendor may become legally obligated to pay resulting from any actual or alleged negligent act, error, or omission related to Vendor'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, Vendor 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 Vendor'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 Vendor to maintain the required insurance will constitute a material breach entitling Sourcewell to immediately terminate this Contract for default.

B. CERTIFICATES OF INSURANCE. Prior to commencing under this Contract, Vendor must furnish to Sourcewell 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 Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or sent to the Sourcewell Contract 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 Vendor to provide certificates of insurance, in no way limits or relieves Vendor of its duties and responsibilities in this Contract.

C. ADDITIONAL INSURED ENDORSEMENT AND PRIMARY AND NON-CONTRIBUTORY INSURANCE CLAUSE. Vendor agrees to list Sourcewell and its Participating Entities, including their officers, agents, and employees, as an additional insured under the Vendor's commercial

general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Vendor, and products and completed operations of Vendor. 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.** Vendor 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 Vendor 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 Vendor or its subcontractors. Where permitted by law, Vendor 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.** Vendor 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 Vendor conducts with Sourcewell and Participating Entities.

## **20. BANKRUPTCY, DEBARMENT, OR SUSPENSION CERTIFICATION**

Vendor 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 Vendor declares bankruptcy, Vendor must immediately notify Sourcewell in writing.

Vendor 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. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Contract. Vendor further warrants that it will provide immediate written notice to Sourcewell 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 also require additional requirements based on specific funding specifications. 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 Vendor’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. Vendor 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. Vendor certifies that during the term of an award for all contracts by Sourcewell resulting from this procurement process, Vendor 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. Vendor certifies that during the term of an award for all contracts by Sourcewell resulting from this procurement process, Vendor 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). Vendor 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. Vendor 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). Vendors must file any required certifications. Vendors 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. Vendors 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. Vendors 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, Vendor must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Vendor 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, Vendor 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, Vendor 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). Vendor agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Vendor that are directly pertinent to Vendor'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 Vendor'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.

**22. CANCELLATION**

Sourcewell or Vendor 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 Vendor's Proposal. Cancellation of this Contract does not relieve either party of financial, product, or service obligations incurred or accrued prior to cancellation.

Sourcewell

ALPHA Facilities Solutions, LLC

DocuSigned by:  
*Jeremy Schwartz*  
C0FD2A139D06489...  
By: \_\_\_\_\_  
Jeremy Schwartz  
Title: Chief Procurement Officer  
Date: 3/23/2021 | 7:55 PM CDT

DocuSigned by:  
*John A. Garcia*  
F40A0F600DA84F7...  
By: \_\_\_\_\_  
John A. Garcia  
Title: Chief Executive Officer  
Date: 3/23/2021 | 7:39 PM PDT

Approved:  
DocuSigned by:  
*Chad Coauette*  
7E42B8F817A64CC...  
By: \_\_\_\_\_  
Chad Coauette  
Title: Executive Director/CEO  
Date: 3/24/2021 | 5:43 AM CDT

# RFP 020421 - Facility Assessment and Planning with Related Services

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## Vendor Details

Company Name: ALPHA Facilities Solutions, LLC

Does your company conduct business under any other name? If yes, please state: TX

Address: 4085 Cibolo Canyons  
Suite 200  
San Antonio, Texas 78261

Contact: Alyssa Morales

Email: alyssa.morales@alphafacilities.com

Phone: 210-492-5742 132

Fax: 210-492-5742

HST#:

## Submission Details

Created On: Monday January 04, 2021 09:24:07

Submitted On: Thursday February 04, 2021 15:17:25

Submitted By: Alyssa Morales

Email: alyssa.morales@alphafacilities.com

Transaction #: ba4e0e00-e594-48d6-a212-e207bbff32fd

Submitter's IP Address: 104.51.208.44

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## Specifications

**Table 1: Proposer Identity & Authorized Representatives**

**General Instructions** (applies to all Tables) Sourcwell prefers a brief but thorough response to each question. Please do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; mark "NA" if the question does not apply to you (preferably with an explanation).

Line Item	Question	Response *
1	Proposer Legal Name (and applicable d/b/a, if any):	ALPHA Facilities Solutions, LLC
2	Proposer Address:	ALPHA Facilities Solutions, LLC 4085 Cibolo Canyons, Suite 200 San Antonio, TX 78261  Previously located at 11503 NW Military Hwy, Suite 300, San Antonio TX 78231
3	Proposer website address:	www.alphafacilities.com
4	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):	John A. Garcia, Chief Executive Officer, 210-240-7531, john.garcia@alphafacilities.com Kathleen I. Garcia, Chief of Staff, 210-301-6190, kgarcia@alphafacilities.com 4085 Cibolo Canyons, Ste 200, San Antonio, TX 78261
5	Proposer's primary contact for this proposal (name, title, address, email address & phone):	John A. Garcia, Chief Executive Officer, 210-240-7531, john.garcia@alphafacilities.com
6	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Kimberley Jones, Chief Client Officer, 210-464-4630, kimberley.jones@alphafacilities.com

**Table 2: Company Information and Financial Strength**

Line Item	Question	Response *
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7	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>ALPHA Facilities Solutions, LLC (ALPHA), was founded in 2007 and encompasses a 100 person team of leading experts in the profession of Asset Management of the built environment and workforce readiness. ALPHA headquarters is located in San Antonio, Texas with offices in College Station, Texas, and Pittsburgh, Pennsylvania.</p> <p>ALPHA is a worldwide provider of capital, environmental planning software solutions for the built environment and workforce readiness management supported by a wide array of professional services including facility asset management; capital planning, facility condition assessment, environmental assessments and planning, maintenance management (including equipment inventory and PM schedule creation), energy audits, investment strategy, space planning, information technology assessments and planning, and workforce readiness services to federal/state/municipal, education, healthcare and commercial clients. In 2020 ALPHA formed ALPHA Prime Solutions, dba to consolidate and focus on our clients and market growing demand for our technology products and services.</p> <p>With extensive worldwide expertise, ALPHA has a successful documented track record for helping clients achieve their goals. As a direct result of ALPHA's work product, clients have realized coordinated benefits of millions of dollars in additional sustainment funding and over \$9 Billion in additional capital resources.</p> <p>Our business priorities are simple:</p> <p>#1 Take care of our Clients (every client is embraced as client for life)  #2 Taking care of our People that take care of our Clients.  #3 Taking care of our organization.</p> <p>We are in business to serve the higher purpose of helping all built environment owners and operators to be better stewards of their people and built environment assets therein providing all those that experience them a safer and more functionally fit environment in which to live, work and play.</p> <p>We hold the truth of this purpose to be self-evident in all we do by creating a team with unwavering integrity and steadfast spirit and dedication to serve this purpose. So, we move forward each day with renewed spirit, aspiration and focus to build —</p> <p>One business...</p> <p>For all markets...</p> <p>With the scales of success measuring value to the client, the people and organization serving the client.</p> <p>ALPHA's core values are embodied by DIICE, which represents Dedication, Innovation, Integrity, Commitment and Excellence. We encourage all of our team members to apply these core principles in their daily work efforts, decision making, and self-evaluation.</p>
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8	<p>What are your company's expectations in the event of an award?</p>	<p>Our company goals and expectations are to provide a respected contract vehicle to our clients, who need our facility assessment and planning support services together with our software solutions to help them achieve their mission. The outcome of this will be growing our sales and Sourcewell's sales. Upon award, we will market the Sourcewell contract extensively and reach deeper into our existing client base of more than 1,000 entities and approximately 50 teaming partners to leverage access to our professional services that are supported by state-of-the-art capital and environmental planning software solutions. Our facility assessment, planning and related services are even more powerful when they are coupled with a software solution. As part of our professional service offerings, we populate a respective software solution. This approach offers Sourcewell participating entities a comprehensive, turn-key solution. To create an even larger bandwidth of sales opportunities, our asset management service offerings are often needed by our growing family of software partners.</p> <p>We have an expectation that ALPHA will be recognized as a vendor who offers a unique value add to Sourcewell participating entities because we bring together our services and software expertise to merge separately managed and budgeted realms of Capital Planning, Operations and Maintenance and other major programs such as environmental planning, bond planning, and energy planning by documenting holistic needs and accountable measures of success.</p> <p>Our expectation is that once any combination of coordinated capital planning, operations and maintenance needs are identified--such as roof replacements, architectural, mechanical, electrical and plumbing needs--our clients will turn to Sourcewell vendors to acquire construction services, flooring, fire and life safety services to implement their projects.</p> <p>For example, ALPHA's Asset Performance Planning Software (APPS) supports all aspects of capital planning for the built environment managed by federal, state, municipal, education, healthcare facility managers. Once populated with key data elements about the building or asset's age, condition and last renewal, the data sets produced by APPS will assist managers prioritizing reinvestment requirements and communicating financial needs to their leadership and communities.</p> <p>Capital planning and computerized maintenance management systems (CMMS) software are often implemented within the same timeframe in an effort to take existing asset management programs to the next level of sophistication. The value and demand for our professional services to support our clients' and our software partners' preferred computerized maintenance management system (CMMS) software continues to grow by approximately 20% each year.</p>
9	<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>Since our founding in 2007, our annual operating profit on net revenue has averaged over 34%. Our average operating profit on net revenue for the last three reported years ('17, '18, '19) was over 55%. *Compared to over 415 companies included in a 2019 annual industry report, annual operating profit on net revenue for established classical professional architecture, engineering and environmental firms averaged 15.8%. In fact, our performance on this metric in 2019 of 71.6% operating profit on net revenue, and many other financial key performance indicators, positions us in industry as an exceptional "High Performer" compared to the over 415 companies included in this 2019 study with an aggregate average operating profit on net revenue of 24.3% Our sustained performance at these high levels of achievement speaks directly to our abilities to not only establish fiscal strength and stability but to deliver tremendous value and grow to the profession of Asset Management for the built and workforce readiness environments.</p> <p>To detail and demonstrate ALPHA's financial strength and stability, we submitted a letter of reference from our banking entity. It's our understanding that our submittal to this solicitation will be available to the public. Due to the confidential nature of our corporate financial statements, we are providing a comprehensive Dun and Bradstreet report and detailed reference letters addressing ALPHA's extraordinary fiscal responsibility and our ability to successfully market, contract and execute millions of dollars of work. Additionally, ALPHA successfully completed the rigorous audit conducted by the Defense Contract Audit Agency in September of 2020.</p> <p>Since ALPHA was founded, we have successfully delivered over \$170M in contracts providing professional services, software and software support and service-related work products.</p> <p>ALPHA has been recognized by Texas A&amp;M Aggie 100 in 2018 (45.7% CAGR) and 2019 (56.3% CAGR) for incredible growth rates based on three-year compound annual revenue growth. Additionally, the San Antonio Business Journal recognized ALPHA for similar high growth rates in 2019.</p>

10	What is your US market share for the solutions that you are proposing?	<p>We estimate ALPHA's market share of the US education, state/municipal, healthcare, hospitality, commercial and federal asset management market is between 10-15%--and growing each year—even during the pandemic.</p> <p>ALPHA's overall market share will grow exponentially with a successful award of a Sourcwell contract. ALPHA has an extensive client base and proven track record for successfully marketing, contracting and executing asset management services. We specifically market "turn-key" service offerings coupled with capital, environmental planning and workforce readiness/management software solutions -totaling over \$170M.</p> <p>Grandview Research reports the global asset management market size was valued at USD 216.98 billion in 2019. It is expected to expand at a compound annual growth rate (CAGR) of 25.9% from 2020 to 2027. The capabilities of asset management solutions to streamline the operations, optimize the utilization of existing resources, and subsequently help enterprises in saving costs, enhancing profits, and improving the Return on Investment (ROI) are expected to drive the market growth. These solutions and services help organizations in reducing inventory and stock management costs. They also help enterprises in utilizing their existing assets efficiently by tracking and managing them in real-time. Personnel tracking solutions can help organizations in ensuring workforce safety and enhancing workforce efficiency. In the healthcare industry, tracking both personnel and equipment can particularly help in enhancing patient care.</p> <p>ALPHA is offering Sourcwell participating entities a comprehensive set of service offerings and solutions by bringing together professional services with software. The success of our business model is documented within this research.</p> <p>The global capital program management software market was valued at USD 1.1 Trillion 2018 and expected to reach USD 1.8 Trillion by 2025 per Brandessence Market Research &amp; Consulting.</p> <p>In 2019, the global computerized maintenance management system (CMMS) software market size was 899.5 million and it's expected to reach 1.6 Billion by 2026. This is shared because much of the CMMS market requires a capital planning technology solution as well. Our experience is clients will invest in a CMMS first, and then after, or in conjunction with successful implementation, the next natural step is to purchase a capital planning software solution. Our CMMS implementation services (asset inventory and preventive maintenance (PM) schedules) are in high demand due to documented successes.</p> <p>Workforce Readiness technology and service solution industry market demand sources have been aligning to quantify total available and serviceable markets in the past five to six years with the new and innovative solutions, such as ours, ensuring documented and accessible information to manage critical skilled credentialed staff training and readiness status. Our client base of law enforcement, security services and aviation maintenance sectors are experiencing significant growth and increasing demands indicating our five-year growth potential in these market segments is over \$20M. Expanding into all of our client market segments will increase these projections significantly.</p> <p>MarketsandMarkets forecasts the global workforce management market size to grow from USD 6.0 billion in 2020 to USD 9.3 billion by 2025, at a Compound Annual Growth Rate (CAGR) of 9.3% during the forecast period. The growing demand for workforce optimization and mobile applications is one of the major factors expected to drive the growth of this market.</p>	*
11	What is your Canadian market share for the solutions that you are proposing?	<p>ALPHA is a global supplier of facility condition assessment, planning and related services. We successfully market, contract and execute projects in Canada and estimate ALPHA's market share of the Canadian and US market for education, state/municipal, healthcare, hospitality, commercial and federal asset management market is between 15-20%.</p> <p>Beyond North America, ALPHA performs asset management services to include facility condition assessments, AHERA surveys, asset inventory and barcode tagging, and software implementations globally for the Department of Defense Education Activity e.g. Europe, Pacific and Americas and facilities located on US Army, Air Force, Marines and Navy installations.</p> <p>We follow CDC protocols, state, local and host nation guidelines to perform our services safely and responsibly. We have successfully provided our asset management services throughout the pandemic.</p>	*
12	Has your business ever petitioned for bankruptcy protection? If so, explain in detail.	No.	*

13	<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>Service Provider Employee Based Sales - Our relationship with our sales and service force is multi-dimensional. Our employee-based sales force is our workforce. Our organization has a business development group supported by practice leaders who are in a continuous state of marketing and sales. Our technical teams traditionally work with our business development and practice leads and engage the client early in the sales process. Once our technical teams begin working directly with our clients, they are trained to engage in discussion and prospect for additional services the client may need to make their capital and environmental planning software implementation experience the most meaningful. Our organization is a highly focused, client facing group of professionals, who treat each interaction as an opportunity to help our clients do the best work of their lives.</p> <p>Our Business Development team researches and identifies both long and short-term leads. They are well versed on contracting options and how to assist clients identify need, guide and direct clients to appropriate contracting vehicles and provide assistance with any technical scopes of work if necessary.</p> <p>We have six individuals responsible for maintaining current client base and growing their respective practices. Within each of the practice areas, there is another group of project managers known as "seller-doers" who also actively participate in sales engagements.</p> <p>The practice leaders and members of our business development team participate in local, national and international industry events. ALPHA actively conducts sponsored research and development with Tier 1 Higher Education and industry partners with multiple highly cited publications, submits white papers and abstracts for speaking events both personally and virtually since the beginning of the pandemic. Practice leaders are responsible for marketing and selling the capital and environmental planning software solutions and the professional services needed to populate the software and make the software a turn-key solution. The practice leads coordinate their efforts across the defined geographic regions e.g. OCONUS Europe, Pacific/CONUS, Northeast, Southeast, Northern Central, Southern Central, Northwest and Southwest.</p> <ol style="list-style-type: none"> <li>1. Asset Management</li> <li>2. Financial Management</li> <li>3. Environmental Planning</li> <li>4. Energy</li> <li>5. Information Technology</li> <li>6. Workforce Readiness</li> </ol> <p>Teaming Partnerships – In addition to ALPHA Employee Based sales, ALPHA has established a long list of teaming relationships with software, architectural, engineering, and environmental firms who desire capital and environmental software planning solutions. We have co-developed training material and a process for co-marketing and selling efforts to assist facility owners and managers with meaningful, cost effective solutions.</p> <p>Each of our teaming partners has a sales team who are grouped by market and geographic territory. We align the ALPHA employee-based sales team with our teaming partner's sales team to market and win work with clients across all markets.</p>
14	<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>ALPHA Facilities Solutions is an architectural/engineering firm. As part of our service offerings and software, we hold a number of licenses and certifications to support our work products. These credentials are maintained, acquired and kept current in support of the business contemplated by this RFP.</p> <p>ALPHA is a member of industry leading trade groups such Texas Association of School Business Officials, Society of American Military Engineers, and International Facility Management Association. Additionally, ALPHA is a Texas licensed Professional Engineering Firm, Texas licensed Asbestos Consulting firm, and our team also holds various environmental certificates for Asbestos Building Inspector, Asbestos Management Planner, Asbestos Project Design, and Contractor Supervision, Asbestos Air Monitoring, Lead Based Paint Building Inspector, Lead Based Paint Risk Assessor, EPA Renovator, HAZWOPER, HAZWOPER Supervisor, COVID-19 Design and Planning, COVID-19 Clean and Disinfect, Indoor Air Quality, and OSHA Safety certifications.</p>
15	<p>Provide all "Suspension or Debarment" information that has applied to your organization during the past ten years.</p>	<p>Not applicable. ALPHA Facilities Solutions has not been associated with any suspension or debarment activities.</p>

**Table 3: Industry Recognition & Marketplace Success**

Line Item	Question	Response *
16	Describe any relevant industry awards or recognition that your company has received in the past five years	San Antonio Business Journal Fast Track Award - 2019 Texas A&M University Aggie 100 - 2019 Texas A&M University Aggie 100 - 2018 Amegy Bank - Small Business of the Year - 2018 Small Business Administration Veteran Owned Business of the Year Award - 2018 International Facility Management Association - Educator of the Year 2015 Minority Enterprise Development Award For Excellent Contracting Support - 2017 Century 21 Fox Business News - Asset Management Spotlight - 2015
17	What percentage of your sales are to the governmental sector in the past three years	65%
18	What percentage of your sales are to the education sector in the past three years	35%
19	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?	We anticipate that a significant portion of the projected GSA contract work would be redirected to Sourcewell once our State, Education and Federal clients have access to Sourcewell.  <ul style="list-style-type: none"> <li>• GSA IT 70 Schedule Awarded June 2020 / Multiple Award Schedule (MAS) Contract - awarded 10/31/2019 - Estimated \$2M Annually - Contract Number: 47QRAA20D000T</li> <li>• GSA OASIS SB Pool 1 - Awarded May 26, 2020 - Estimated \$3M Annually - Contract Number: 47QRAD20D1166</li> <li>• State of West Virginia, Department of Education - \$439k</li> <li>• Multi-Year Contract - U. S. Department of Agriculture Agricultural Research Services - \$736k</li> <li>• Multi-Year Contract - Department of Defense Education Activity - Indefinite Delivery Indefinite Quantity contract awarded September 2019 - \$25M Total Capacity - Approximately \$3.5M - \$4.0M Annually</li> <li>• Multi-Year Contract - City of San Diego awarded February 2014 - \$5M Total Capacity - Approximately \$1M annually - Contract No. H136032</li> </ul>
20	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?	We anticipate that a significant portion of the projected GSA contract work would be redirected to Sourcewell once our State, Education and Federal clients have access to Sourcewell.  <ul style="list-style-type: none"> <li>• GSA IT 70 Schedule Awarded June 2020 / Multiple Award Schedule (MAS) Contract - awarded 10/31/2019 - Estimated \$2M Annually - Contract Number: 47QRAA20D000T</li> <li>• GSA OASIS SB Pool 1 - Awarded May 26, 2020 - Estimated \$3M Annually - Contract Number: 47QRAD20D1166</li> <li>• Multi-Year Contract - GSA Schedule/MAS - U. S. Department of Agriculture Agricultural Research Services - \$736k</li> </ul>

**Table 4: References/Testimonials**

Line Item 21. Supply reference information from three customers who are eligible to be Sourcewell participating entities.

Entity Name *	Contact Name *	Phone Number *
Department of Defense Education Activity	Ron Arnold, DoDEA HQ Program Manager	(571) 372-1346 Ron.Arnold@hq.dodea.edu
US Department of Agriculture, Agricultural Research Service (USDA, ARS)	Sandra Sadler, Program Analyst	Phone: 301.504.1204 Email: Sandra.Sadler@ars.usda.gov
City of Austin	Korrie Johnson, Research Analyst	Phone: (512) 974-3973 Email: korrie.johnson@austintexas.gov
Mesa Public Schools	Holly Williams, Associate Superintendent	(480) 472-7205 hcwilliams@mpsaz.org



**Table 5: Top Five Government or Education Customers**

**Line Item 22. 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 *
81st Readiness Division	Government	South Carolina - SC	Comprehensive Environmental and Base Operations Support	Approximately \$8M Annually	\$24M
Department of Defense Education Activity (DoDEA)	Government	Virginia - VA	Asbestos Hazard Emergency Response Act Inspections; Facility Condition Assessment Surveys; Facility Utilization Survey and Real Property Inventory and Capital and Environmental Planning Software Solutions Support	Approximately \$4M Annually	\$12M
U. S. Department of Agriculture, Agricultural Research Service (USDA, ARS)	Government	Maryland - MD	Facility Condition Assessments; Functional Adequacy and Capital Planning Software Solutions Support	Approximately \$2M Annually	\$6M
Office of the Secretary of Defense – Public Schools on Military Installations	Government	Virginia - VA	Facility Condition Assessments; Educational Adequacy; Space Planning; Development of Key Performance Indicators for Ranking and Prioritization; and Capital Planning Software Solutions Support	Approximately \$4M	\$4M
GSA Assisted Acquisition Service - DoDEA Logistics	Government	Virginia - VA	Facility Fire Extinguishers Inspections; Development of Database; Fire/Life Safety Compliance Services; American, European and Pacific Regulatory Fire/Life Safety Regulatory Compliance Review; and Inventory Planning Software Solutions Support	\$3.8M Multi-Year Contract	\$1M

**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 *
23	Sales force.	<ol style="list-style-type: none"> <li>1. Asset Management – San Antonio, TX; College Station, TX; Nashville, TN, Poulosbo, WA and various locations in Florida and South Carolina</li> <li>2. Environmental Planning – San Antonio, TX and Pittsburgh, PA</li> <li>3. Financial Management – Washington, D.C.</li> <li>4. Energy – San Antonio, TX; Atlanta, GA</li> <li>5. Information Technology - San Antonio, TX, Pittsburgh, PA , Washington, D.C and Poulosbo, WA</li> <li>6. Workforce Readiness - San Antonio, TX and Poulosbo, WA</li> </ol> <p>The locations of our sales network and service provider is summarized below:</p> <ol style="list-style-type: none"> <li>1. San Antonio, TX</li> <li>2. Pittsburgh, PA</li> <li>3. College Station, TX</li> <li>4. Athens, AL</li> <li>5. Birmingham, AL</li> </ol>

6. Dadeville, AL
7. Mobile, AL
8. Nashville, TN
9. Clarksville, TN
10. Crossville, TN
11. Millington, TN
12. Jacksonville, FL
13. Lakeland, FL
14. Melbourne Beach, FL
15. N. Reddington Beach, FL
16. Ponte Vedra, FL
17. Atlanta, GA
18. Blairsville, GA
19. Midland, GA
20. Savannah, GA
21. Bardstown, KY
22. Elizabethtown, KY
23. Hartford, KY
24. Lexington, KY
25. Petal, MS
26. Myrtle Beach, SC
27. Columbia, SC
28. Lexington, SC
29. Washington D. C.
30. Charlottesville, VA
31. Fredericksburg, VA
32. Alexandria, VA
33. Beltsville, Maryland
34. Poulsbo, WA
35. Colorado Springs, CO
36. San Diego, California
37. Cary, NC

Outlined below please find a summary of our sectors and sales personnel supporting our capital and environmental planning software solutions. \*

Asset Management:

Number of Workers – 11  
ALPHA Employees – 11  
Third Party Employees – 20  
Overlap between Sales and Service - None

Environmental Planning:

Number of Workers – 12  
ALPHA Employees – 12  
Third Party Employees – 10  
Overlap between Sales and Service - None

Financial Management:

Number of Workers – 11  
ALPHA Employees – 11  
Third Party Employees – 10  
Overlap between Sales and Service - None

Energy Management:

Number of Workers – 10  
ALPHA Employees – 10  
Third Party Employees – 5  
Overlap between Sales and Service - None

Information Technology:

Number of Workers – 12  
ALPHA Employees – 12  
Third Party Employees – 5  
Overlap between Sales and Service - None

Workforce Readiness:

Number of Workers – 9  
ALPHA Employees – 9  
Third Party Employees – 2  
Overlap between Sales and Service – None

Teaming Partnerships – In addition to ALPHA Employee Based sales, ALPHA has established a long list of teaming relationships with software, architectural, engineering, and environmental firms who desire high functioning CMMS, capital planning, environmental planning, and workforce readiness software solutions. We

		<p>have co-developed training material and a process for co-marketing and selling efforts to assist facility owners and managers with meaningful, cost effective solutions.</p> <p>Each of our teaming partners has a sales team who are grouped by market and geographic territory. We align the ALPHA employee-based sales team with our teaming partner's sales team to market and win work with clients across all markets.</p>	
24	<p>Dealer network or other distribution methods.</p>	<p>ALPHA's teaming relationships serve as powerful dealer network. ALPHA has established a long list of strategic teaming relationships with software, architectural, engineering, and environmental firms who desire high functioning CMMS, capital and environmental software planning, and workforce readiness solutions.</p> <p>We have co-developed training material and a process for co-marketing and selling efforts to assist facility owners and managers with meaningful, cost effective solutions. This network is comprised of architectural, engineering, environmental planning, aviation and facility maintenance management and research and development companies who have a global client base. These firms reach back to ALPHA's core business offerings to specifically access our asset management expertise as well as meet their service-disabled veteran owned business goals.</p> <p>Our dealer network will be able to reference the Sourcwell contract as a viable, convenient contracting vehicle to their client base. Again, leveraging the power of large, global companies strengthening their ability to market and sell services ALPHA provides through Sourcwell.</p>	*
25	<p>Service force.</p>	<p>We have over 100 professionals that have dedicated their career to asset management. Our workforce is comprised of environmental experts, construction professionals, architects, engineers, data scientists, commissioning, cost estimating, program/project management, financial management, landscape architects, water resource management, energy management, and IT/programming specialists.</p>	*
26	<p>Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.</p>	<p>Our number one business priority is to "Take care of our Clients" and every client is embraced as a client for life. Our team represents a collection of qualified professionals who have dedicated their careers to developing capital and environmental planning software solutions and providing the necessary services to maximize their value to client organizations.</p> <p>Our core values translate into a firm who is highly sought after for small, medium and complex, large-scale, geographically dispersed projects. Our firm and our people are known for being professional, friendly, responsive, and fantastic communicators. We enjoy interacting with our clients on a frequent basis to confirm the project is on track. We are conscientious and situationally aware of the need to verify that our customers are happy with our progress. We want to be available and responsible to address any unanticipated concerns that may arise so we can make any mid-course refinements.</p> <p>Our customer service approach is embedded in our culture and how we interact with each of our clients. Outlined below are the pillars of our success:</p> <p>1. Communication and Responsiveness – We focus on customer satisfaction by assigning the appropriate asset management, environmental expertise, and software engineers to all of our asset management service offerings. Our communication methods are established based on client preference during the project kick off and follow suit for the duration of the project. Should anything arise that needs to be addressed outside of the established communication schedule, we will reach out directly to the client in a timely fashion and request the client do the same, should a need arise.</p> <p>We hold monthly in-progress review meetings with our clients to review scope of work activities, project milestones, on and off site execution schedules, status of deliverables and overall client satisfaction.</p> <p>We also prepare detailed project status reports on a monthly basis. The project status reports are submitted to our clients with their monthly invoice. This process provides for a transparent review of how the overall project is performing and ALPHA's fiscal responsibility and accountability of billing for the services actually performed on a percent complete basis.</p> <p>This approach builds tremendous trust and assures the client that they are valued and respected. ALPHA clients are happy clients and happy clients pay their invoices on time and serve as exceptional references to others needing ALPHA services.</p> <p>Our software solutions support is highly responsive and we have a help desk staffed Monday through Friday, during business hours 8:30 – 5:30 p.m. CDT. Specialists receive customer inquiries through email, customized web portals, and widgets embedded in our software. They then prioritize these inquiries as Tier 1/2/3 support issues. Specialists provide detailed responses to Tier 1 issues within 24 hours.</p>	

Support Specialist coordinate with implementation specialists on Tier 2 issues, as those are typically configuration issues. The result is a thorough response to the customer within 72 hours. A team of software developers focuses on addressing Tier 3 customer issues ("Bugs"), with help from Domain Experts. Through close coordination with the Product Manager, Tier 3 issues are prioritized to the top of the Product Backlog. The result is inclusion into the next bi-weekly release after thorough review and testing for quality control. Throughout the support process, the customer is provided email updates, as each workflow step is completed. The customer also has access to thorough knowledge bases through our web portals. These knowledge bases are routinely updated by our Support Specialists.

2. Quality Management – We focus on ensuring the quality assurance and quality control processes are properly staffed and Quality Assurance and Quality Control practices and policies are applied throughout each and every contract. All of our deliverables go through a peer-review process, and quality assurance/quality control checks are used to ensure a high level of quality for our work products.

As part of our standard software development process, all of our products are run through an intense testing process to include code reviews, unit testing, and integration testing. Test/use cases are also written against client requirements to ensure software meets client needs. We also use a strict source control process to manage our source code which includes check-in/checkout processes and change comments.

3. Tailored Contract Execution – We focus on ensuring a flexible, organizational execution plan is applied throughout each contract. This plan is in a continuous state of improvement and refinement, so each contract benefits from best in class, software solutions and service industry practices.

4. Scope, Schedule and Budget – We focus on building project management plans, schedules, and budgets that please our customers. We apply established procedures and management tools that effectively address software solution implementations and technical support; project staffing needs; schedules and the quality of the contract deliverables. We have never failed to negotiate a contract with a client who wanted to hire us.

As part of our requirements gathering process for software development, we meet with the clients to discuss their requirements. We then create requirements documentation and develop wire diagrams to show application process flow. This ensures we fully understand client requirements with documentation and the ability to walk through the application with interactive wire diagrams. Utilizing wire diagrams allows us to make minor changes real time for any requirements that may have been misunderstood.

5. Personnel Planning – We focus on having an in-depth understanding of the scope of work and assigning highly qualified, experienced individuals with recent, relevant experience from our bench of professionals.

27	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in the United States.	<p>ALPHA has a proven track record of providing our services and products to large, complex geographically dispersed projects and clients in the U.S. and internationally.</p> <p>We welcome the opportunity and freely offer our willingness to provide our services and products to Sourcewell participating entities in the U.S.</p> <p>For example, we routinely conduct facility condition assessments, AHERA surveys, asset inventories and tagging, populate CMMS, capital planning software and environmental planning and workforce readiness software for clients with small, medium and large portfolios. We coordinated with eight architectural/engineering firms to populate capital planning software for the West Virginia Department of Education for their entire portfolio of 43 million square feet of educational facilities. Using ALPHA's Asset Performance and Planning software, published 660 individual school reports and 62 county executive summaries.</p> <p>We were contracted by the Department of Defense Education Activity to populate capital planning software for all public schools sitting inside military installation fence lines. The portfolio of schools equated to approximately 14 million gross square feet of facilities. We deployed teams across 26 U.S. states (including Alaska and Hawaii) to collect the data needed to populate the software and generated 183 school reports across 70 different public school districts, and an overall executive summary within 8 months. The client provided us with Exceptional performance reviews.</p> <p>Since the beginning of the COVID 19 pandemic, we immediately trained our staff on CDC approved protocols. Our team members follow all state/local COVID 19 travel restrictions, policies and procedures to keep our clients safe and our staff safe.</p> <p>Our company is structured for high volume, geographically dispersed projects.</p>	*
28	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	<p>To date, we have successfully completed projects in British Columbia and Alberta. We welcome the opportunity and freely offer our willingness to provide our products and services to Sourcewell participating entities in Canada.</p> <p>Providing our services to international clients is an everyday event. ALPHA is currently under contract with the Department of Defense Education Activity where we are required to populate capital planning and environmental planning software for their schools across Europe, Japan, Korea, Guam and Okinawa. Our teams have passports, Contractor Access Cards (CACs) and are skilled at traveling internationally. For these projects we will be providing services for approximately 13 Million Gross Square Feet of educational and administrative facilities.</p> <p>Using ALPHA's Asset Performance and Planning software, we will publish over 90 individual school reports and Asbestos Management plans.</p> <p>Since the beginning of the COVID-19 pandemic, we immediately trained our staff on CDC approved protocols. Our team members follow all country/state/local COVID-19 travel restrictions, policies and procedures to keep our clients safe and our staff safe while performing our services.</p> <p>Our company is structured for high volume, geographically dispersed projects.</p>	*
29	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed contract.	None.	*
30	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?	None.	*
31	Define any specific contract requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	None.	*

**Table 7: Marketing Plan**

Line Item	Question	Response *
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32	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>Upon notification of a Sourcwell contract award, we will launch a marketing blitz to all of our existing clients, business development leads and teaming partner sales organizations (Approximately 1,000 entities). Our client base has repeatedly asked if they could reach us through the Sourcwell contract. We have a ready-made market through former and current marketing efforts. We have been waiting for this on-ramp to become available so that we can immediately begin referring current and new clients to Sourcwell.</p> <p>We believe both our federal and non-federal clients will benefit greatly from accessing our software solutions and services through Sourcwell. Our federal client base generates approximately \$15M annually and our non-federal clients is approximately \$7M. Our projected sales are forecast to grow by 30% in Year One of the Sourcwell contract and by 50% in Year Two, with sustained growth for the remainder of the contract.</p> <p>We are making an exclusive commitment to Sourcwell to market this contract to all of our clients and business development leads.</p> <p>In all communications with our existing and potential clients, we market available contract vehicles to them so that they can make informed choices as to which acquisition strategy will work best within their organizations. Starting with our Website and flash communications to our client base, we will advertise the Sourcwell Contract. All of our proposals, marketing materials, speaking engagements, and correspondence with clients will feature the Sourcwell contract vehicle.</p> <p>Most importantly, our project report deliverables will feature the benefits of reaching out to Sourcwell to leverage the Sourcwell vendors as they confirm and plan for projects identified within our capital and environmental planning service activities. We engage our clients in contract vehicle discussions early in our sales process. Marketing Sourcwell will be our primary contract vehicle to market due to its brand recognition and ease of use.</p>
33	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>In order to maintain a firm understanding of potential clients, we are actively engaged with the LinkedIn community and continue to take advantage of metadata usage and search engine optimization tools such as YOASt. Google Analytics also continues to be an invaluable tool for us in tracking visitors to our website and monitoring usage patterns. Understanding which areas of our website generate high traffic is vital to improving our visibility and our team of developers and designers give us the ability to make modifications to our website quickly therein creating excellent agility within our digital marketing campaigns. We will feature the Sourcwell contract on our website and detail how to quickly acquire software technology solutions along with Alpha's asset management services.</p> <p>While our client base has historically not emanated from traditional social media marketing efforts due to the consultative nature of our sales and marketing efforts, we are making concerted efforts to further Alpha's reach, brand recognition and service offering portfolio on Facebook, Instagram and twitter. With the rise in engagement, connectivity, and communication through social media channels between federal, state, municipal, private entities, and those that they serve, we truly understand the value in developing these platforms and have a skilled, experienced team within our workforce dedicated to these efforts. The variety of capture mechanisms and editing tools now available within mobile apps on these platforms allows us a dynamic approach to demonstrating the capabilities of our service offerings and the dedication with which we serve our clients. We are confident our growth on these platforms will increase exposure and generate leads where they did not exist before.</p> <p>As a part of our sales and marketing plan, we also offer webinars to both current and potential clients. Our direct experience with myriad client scenarios has refined our ability to highlight best practices across all service offerings and our goal to provide the resources, knowledge, training, and expertise that our clients need to be successful in achieving their goals is unwavering. With access to data and experience from hundreds of organizations, we continue to serve our clients at the highest possible level.</p> <p>Further, webinar sessions are specifically geared towards building our team's credibility with the client's organization and demonstrating immediate cost savings opportunities. With our deep industry knowledge, connected suite of services, unmatched predictive insights, and unwavering commitment, we are positioned to help clients take control of their operations, move forward, and excel. We always view each client as a client for life and are invested in ensuring programs are successful and goals are met and/or surpassed. While we are constantly refining and improving both traditional and more modern digital marketing efforts, our exceptional performance ratings for product/project management underscore our approach to sales and marketing and the passion with which we engage our clients and partners.</p>

34	<p>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>	<p>We view this contract vehicle as a long-term strategic partnership, we anticipate our firm's name and credentials will be posted as a vendor on the Sourcewell website and database. In turn, we will launch a marketing blitz to all of our existing clients and all business development leads. Our client base has repeatedly asked if they could reach us through the Sourcewell contract. We have a ready-made market through former and current marketing efforts. Our teaming relationships with serve as dealer network and force multiplier for marketing ALPHA services and the Sourcewell contract vehicle. This network is comprised of architectural, engineering, environmental planning,</p> <p>This network is comprised of architectural, engineering, environmental planning, aviation and facility maintenance management and research and development companies who have a global client base. We have been waiting for this on-ramp to become available so that we can immediately begin referring current and new clients to Sourcewell.</p> <p>We believe both our federal and non-federal clients will benefit greatly from accessing our software solutions and services through Sourcewell. Our federal client base generates approximately \$15M annually and our non-federal clients is approximately \$7M. Our sales projects are forecast to grow by 30% in Year One of the Sourcewell contract and by 50% in Year Two, with sustained growth for the remainder of the contract.</p> <p>In all communications with our existing and potential clients, we market available contract vehicles to them so that they can make informed choices as to which acquisition strategy will work best within their organizations. Starting with our website and flash communications to our client base, we will advertise the Sourcewell Contract. All of our proposals, marketing materials, speaking engagements, and correspondence with clients will feature the Sourcewell contract vehicle.</p> <p>Most importantly, our project report deliverables will feature the benefits of reaching out to Sourcewell to leverage the Sourcewell vendors as they confirm and plan for projects identified within our capital and environmental planning service activities. We engage our clients in contract vehicle discussions early in our sales process. Marketing Sourcewell will be our primary contract vehicle to market due to its brand recognition and ease of use.</p>
35	<p>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>	<p>At this time, we accept credit card payments. ALPHA services and software solutions are available via the GSA eBuy system associated with our GSA Schedule / MAS contract. Independent of the GSA e-procurement system, ALPHA is researching an alternative e-procurement system that will meet the requirements of our clients and our service offerings. To date, our direct, relevant experience is with the GSA eBuy system.</p>

**Table 8: Value-Added Attributes**

Line Item	Question	Response *
36	<p>Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.</p>	<p>The following training programs are offered to participating entities as an optional fee. Training is currently being offered virtually. On-site training is available upon request.</p> <p>Asset Performance Planning Software Training Programs</p> <ol style="list-style-type: none"> <li>Executive (4 hours): Training for users who want access to reports and be able to monitor the current condition of the assets but will have no responsibility for the day to day manipulation of the data. Executive training will provide for these users. This training includes an explanation of the data elements.</li> <li>User (2 hours): User training is the training on how to use and operate the software to perform the majority of data entry tasks.</li> <li>Advanced User (2 hours): Advanced users need more in depth knowledge about the data in the application, so they must first attend the Executive training. The Advanced users can do the data entry for any task in the application and includes details such as pricing that is not available to the majority of users. This group of users will be come your condition assessment experts.</li> <li>Administration (2 hours): Administration training is the training necessary to setup users and passwords, change pull-down menus, change the fiscal year, and publish data to the dashboard (the executive view). This group of users is typically small and controls the most important data that has an effect on all the buildings in the system. Because of this, they must have the Executive and Advanced User training and it is recommended that they take the User training as well.</li> <li>Analytics (1 day): Students will learn how to check the data for quality inputs. They will also learn how all the data is calculated. This class is usually targeted for senior employees.</li> </ol>

## MPPPrime™ Environmental Planning Software Training Program

1. Environmental Planning (4 hours) - MPPPrime™ training will provide users with the knowledge needed to create and edit users, enter data into the application at all levels, and produce reports. The training will be comprehensive for both admin users and data entry users. Admin users will learn how to create users and upload their appropriate certificates as well as update users to update passwords and certificates. Data entry users will learn how to create new buildings, rooms, materials, and samples. Data entry users will also learn how to set appropriate action steps based on material type as well other environmental factors that may affect the materials. This training will also include reports, their purpose and the data contained in the reports. \*

## Advanced Skills Management Industrial Training Program

Workforce readiness management enables an organization to inventory the talent and expertise of the workforce and reconcile it against the needs of the organization and support mission readiness. Goals can be set to address specific skill needs and then compared against actual staffing to identify gaps. It also provides greater visibility into real-time readiness of selected personnel and/or capabilities. Having the ability to plan to know where talent and expertise will be needed can serve as the foundation for establishing mission critical training and educational programs that can be certified and offer growth potential to motivate the workforce. Benefits include:

- Critical Skills Management: Inventory and reconcile the talent and expertise of the workforce against the needs of your organization to support mission readiness.
- Connecting the Enterprise: Realizing the benefits of a centralized database to automate, track and manage all of the workforce readiness processes all from within a single web-based application.
- Managing Training: Managing and tracking personnel training can be a time consuming and overwhelming. Ensuring your workforce training credentials are accurate is important when assessing the next mission's needs and knowing who on your team has the necessary skills for execution.
- Tracking Certifications: As new members of your workforce arrive, tracking and maintaining their training, experience and qualifications is critical in establishing their baseline.

1. Executive (4 hours): Training for users who want access to analytics and reports to track current status of all training users. This level of user has no responsibility for the day-to-day manipulation of the data.

2. User (2 hours): User training is the training on how to use and operate the software to track, organize, and coordinate required training and training tracks.

3. Administration (2 hours): Administration training is the training necessary to setup users and passwords, change pull-down menus, and implement training and training track requirements developed by users. This group of users is typically small and controls the most important aspect of the system for controlling training requirements. Because of this, they must have the Executive training and it is recommended that they take the User training as well.



<p>37</p>	<p>Describe any technological advances that your proposed products or services offer.</p>	<p>A distinctive technological advance relates to the synergistic relationship between the capital and environmental planning software solutions and our services.</p> <p>Using the combination of APPS, MPPPrime™, and our asset management services, a comprehensive and defensible Capital Asset Management Plan can be generated that considers the following factors:</p> <ul style="list-style-type: none"> <li>Asset Condition</li> <li>ADA Deficiencies</li> <li>Energy Consumption</li> <li>Asbestos Management</li> <li>Asset Importance</li> <li>Asset Age</li> <li>Asset Obsolescence</li> <li>Desired Asset Condition</li> <li>Existing Plans</li> <li>Budget, which can be either fixed or calculated to meet multiple Key Performance Indicators *</li> </ul> <p>The Capital Asset Management Plan will provide the information on what work needs to be done, on which building, in what year to meet the desired condition.</p> <p>This approach has successfully delivered over \$9B in funding for facility repairs, renovations and replacements.</p> <p>Our professional services are supported by state-of-the-art technology. Our teams comprised of architects, engineers, environmental scientists, construction professionals, IT professionals, energy professionals and data scientists employ technology to maximize efficiencies e.g. cloud based electronic data acquisition, data management, barcode scanning, optical character recognition (OCR), BLK 360 devices for 3-D modeling, drones, Bluebeam/CAD services, scanning and digitizing, locating assets on drawings.</p> <p>ALPHA drives state-of-the-art technology solutions into every aspect of our asset management service offerings.</p>
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38	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>ALPHA Related "Green" Initiatives - As a leader in the Asset Management industry, ALPHA applied our own recommended best practices when constructing a new three-story office building offering approximately 30,000 gross square feet of commercial space. Throughout the pre-design, design and construction processes, many green initiatives, EnergyStar and WaterSense labeled components were considered and implemented. In the Summer of 2020, ALPHA completed construction of the new building and moved their Headquarters office into the brand-new office space.</p> <p>In the Pre-Design phase, ALPHA led the development of lifecycle performance specifications and metrics for building envelope, HVAC and lighting systems and plumbing fixtures. In the role of Owner and Program Manager, ALPHA's role continued by monitoring contracted design and construction professional's implementation to the adherence to the lifecycle specifications in each of their areas of applicable professional and trade responsibilities.</p> <p>With a 2.5-3% first built cost premium to achieve this lifecycle cost approach to the design and construction process, overall, compared to typical design and construction specifications for this facility type there will be a 20+% savings in lifecycle costs. Systems and processes are in place to monitor, measure and maintain the desired lifecycle cost performance. The main integrated designed systems contributing to these savings are insulation (including glazing specs, external direct sun shading) and HVAC.</p> <p>A whole building energy model was used in support of designing the building. ALPHA identified Variable Refrigerant Flow HVAC systems as the most energy-efficiency option and also ascertained that the window glazing choices were energetically of benefit.</p> <p>Some simpler fixture examples include on each floor, a water bottle refill station is installed to promote the conservation of water and use of reusable water bottles. To date, ALPHA employees have avoided using over 9,000 plastic bottles of water.</p> <p>In addition to the facility considerations for green initiatives, ALPHA provided reusable water bottles to employees, and provides recycling bins for onsite recycling.</p> <p>Many of the installed lighting fixtures contain LED lights, and motion sensors are used to conserve energy as well when not in use.</p> <p>Outside the building, the landscaping is a xeriscape design and arranged to capitalize on the tree placement for maximum shade on the building to conserve energy during the hot summers in Texas, as well as the installation of an irrigation system that is best in class technology and has earned the Watersense label. All exterior windows also have glazing on the windows and sun shading to conserve energy.</p> <p>Service Related "Green" Initiatives – ALPHA's Energy Management Services practice actively support PACE and LEED projects through whole building energy modeling based either on existing conditions identified through site visits, staff interview and document review or on various versions of ASHRAE 90.1. The practice is also leading ALPHA's efforts for whole building monitoring at their headquarters building in San Antonio, with the goal of maximizing energy performance and minimizing unexpected downtime. This is being implemented using BACnet servers and SkySpark database and visualization software.</p> <p>Building Energy Modeling – ALPHA specializes in the assessment of building energy use, identification of pathways to reduce such, and quantification of the technical and financial performance of implementation of such pathways. It deploys Department of Energy software to that end, i.e. OpenStudio/EnergyPlus for technical performance, coupled with Microsoft Excel for financial performance.</p>
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<p>39</p>	<p>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.</p>	<p>Texas Property Assessed Clean Energy (PACE) Program - ALPHA's energy related services support our clients' energy efficiency and conservation initiatives. For example, we work with Texas-based clients work toward meeting the requirements necessary to receive PACE financing.</p> <p>The PACE Program is a simple and affordable way to finance energy and water efficiency upgrades for commercial properties. PACE provides low cost, long-term, 100% financing for these qualified "Green" improvements. Eligible upgrades are financed over time through a voluntary property tax assessment attached to the property. PACE improvements add value to the property and reduce utility bills with the upgrades typically paying for themselves with positive cash flow over time.</p> <p>Lone Star PACE provides energy efficiency, renewable energy and water conservation improvements to existing properties while generating tangible benefits to property owners, local governments, contractors and the community as a whole. PACE financing requires lender consent for any existing mortgage and the assessment is attached to the property. This provides flexibility as the assessment can either be paid off or assumed by the new owner in the event of a property sale.</p> <p>Our well credentialed staff are in position to help clients attain eco-labels, ratings or certifications related to LEED through our service offerings.</p> <p>ALPHA Facilities Solutions is an architectural/engineering firm. As part of our service offerings and software, we hold a number of licenses and certifications to support our work products. These credentials are maintained, acquired and kept current in support of the business contemplated by this RFP.</p> <p>ALPHA is a member of industry leading trade groups such Texas Association of School Business Officials, Society of American Military Engineers, and International Facility Management Association. Additionally, ALPHA is a Texas licensed Professional Engineering Firm, Texas licensed Asbestos Consulting firm, and our team also holds various environmental certificates for LEED, Certified Energy Management professional, Asbestos Building Inspector, Asbestos Management Planner, Asbestos Project Design, and Contractor Supervision, Asbestos Air Monitoring, Lead Based Paint Building Inspector, Lead Based Paint Risk Assessor, EPA Renovator, HAZWOPER, HAZWOPER Supervisor, COVID-19 Design and Planning, COVID-19 Clean and Disinfect, Indoor Air Quality, and OSHA Safety certifications.</p>
<p>40</p>	<p>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.</p>	<p>ALPHA was accepted into the Small Business Administration (SBA) 8(a) program in 2010 and successfully graduated from the 9-year SBA 8(a) program in 2019 with exemplary service. ALPHA was awarded the SBA 8(a) Service-Disabled Veteran of the Year award in 2018. Our commitment to excellence and demonstrated ability to manage several multi-million-dollar contracts simultaneously is a testimony to how Sourcwell would benefit from awarding ALPHA a contract.</p> <p>In 2018, ALPHA was awarded the SBA Veteran Owned Business of the Year, a highly competitive and regarded award.</p> <p>Small Business Administration Point of Contact and Reference</p> <p>Don Owens          Business Opportunity Specialist          San Antonio District Office          U.S. Small Business Administration          (210) 403-5912          don.owens@sba.gov</p> <ol style="list-style-type: none"> <li>1. Service-Disabled Veteran Owned Small Business – U. S. Department of Veteran Affairs - Center for Verification and Evaluation (CVE)</li> <li>2. South Central Texas Regional Certification Agency             <ol style="list-style-type: none"> <li>a. Disabled Individual Business Enterprise</li> <li>b. Hispanic American Business Enterprise</li> <li>c. Minority Business Enterprise</li> <li>d. Small Business Enterprise</li> <li>e. Veteran Owned Business Enterprise</li> </ol> </li> <li>3. Texas Historically Under Utilized Business</li> </ol>

<p>41</p>	<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>The most unique attributes our company offers with our asset management services and capital, environmental planning and workforce readiness software to Sourcewell participating entities is that the results of our work will develop capital renewal requirements including asset management data sets that will allow participating entities to identify and build projects that will sustain, restore and/or modernize their facilities. Because we are working within the Sourcewell “family” of vendors, we will promote the use of other qualified and capable vendors who can support the newly defined projects. We believe this is a “Win – Win – Win” for the participating entity, ALPHA and Sourcewell. Sourcewell will benefit specifically because they are offering their entities a total, turn-key solution.</p> <p>What makes our proposed solutions unique in our industry as it applies to Sourcewell participating entities is our capital planning, environmental planning and workforce readiness software solutions allow participating entities to transform facility data into high-quality decision-making data so that project planning and prioritization efforts are taken to a new level of sophistication. Our data sets have helped our clients develop meaningful, persuasive communications that have delivered over \$9B in additional maintenance and operations budgets, justification to hire additional staff, transform their reactive maintenance programs into preventive maintenance program saving millions of dollars year.</p> <p>All areas of our clients’ asset management processes need people—the workforce. No matter the size of the organization, there is a need to carefully manage the requirements of the mission they serve and the skilled workforce that leads, implements, manages and executes all aspects of asset management. In concert with the many key elements of Human Resource Management, skills management is asset centric. There can be no effective or efficient tangible or intangible asset management without workforce skills management.</p>
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**Table 9: 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 *
42	Do your warranties cover all products, parts, and labor?	<p>Yes, our warranty covers our professional services and software solutions. Our warranties reflect industry standards or better.</p> <p>ALPHA represents and warrants that all such Professional Services shall be performed in a professional and workmanlike manner in accordance with generally accepted industry standards. For any breach of this warranty, Purchaser's exclusive remedy and ALPHA's entire liability shall be the re-performance of the applicable Professional Services.</p> <p>Disclaimer of Software Warranty. The software is licensed "as is" and you receive no additional express or implied warranties. ALPHA and its suppliers expressly disclaim any and all other warranties of any kind or nature concerning the software, whether expressed, implied or statutory, including without limitation, any warranty of title, merchantability, quality, fitness for a particular purpose, accuracy, non- infringement or the results to be obtained from use, to the fullest extent allowed by applicable law. ALPHA expressly disclaims any warranties that may be implied from usage of trade, course of dealing, or course of performance. Further, without limiting the generality of the foregoing, ALPHA makes no warranties or representations as to performance of the software, and specifically disclaims any warranty that (1) the software will operate in combination with other items, equipment, software, systems or data except, (2) the operation of the software will be uninterrupted or error free, or (3) errors in the software, if any, will be corrected. No oral or written information or advice given by ALPHA, or its agents or employees shall create or form the basis of any warranty of any kind. The software is provided with all faults and the entire risk of satisfactory quality, performance, accuracy, and effort is with you.</p>
43	Do your warranties impose usage restrictions or other limitations that adversely affect coverage?	No.
44	Do your warranties cover the expense of technicians' travel time and mileage to perform warranty repairs?	<p>Yes, the asset management services warranty covers the expense of asset management professionals required travel and mileage to perform repairs. The software solutions do not require technician's travel.</p>
45	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?	<p>In most situations, any problems encountered with the services offered under this contract will be data-related and can be addressed through phone discussions or by repairs to existing data files. In the rare event that physical presence is required at the client's location, ALPHA will be able to travel to all geographic regions of the United States or Canada to perform warranty repairs.</p> <p>There are no United States or Canadian regions where we cannot provide asset management services warranty support.</p> <p>For software solutions, technical support will be addressed virtually, and no travel is required.</p>
46	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?	Not applicable.
47	What are your proposed exchange and return programs and policies?	<p>In the event a Sourcewell participating entity acquires our software or services, and no work has been performed, we will cancel the order at no cost. If an order is received and work as begun, and the client requirements change, we will work with participating entity to reach a mutually agreed upon revised scope and fee to meet their needs.</p> <p>ALPHA represents and warrants that all such Professional Services shall be performed in a professional and workmanlike manner in accordance with generally accepted industry standards. For any breach of this warranty, Purchaser's exclusive remedy and ALPHA's entire liability shall be the re-performance of the applicable Professional Services.</p>
48	Describe any service contract options for the items included in your proposal.	Not applicable.

**Table 10: Payment Terms and Financing Options**

Line Item	Question	Response *
49	What are your payment terms (e.g., net 10, net 30)?	The majority of our contracts are Net 30. However, we understand our client base may not always be able to support Net 30. ALPHA is known for “never failing to negotiate a contract with a client who wanted to hire us to support their asset management program”. This is a true statement. ALPHA has always found a means to develop a scope that supports our client’s goals and budget. The same is true for payment terms. ALPHA is flexible and adaptable.
50	Describe any leasing or financing options available for use by educational or governmental entities.	Our traditional milestone billing for the duration of the of the contract is substantially similar to leasing and extended payment options. For our larger projects, our professional services are billed monthly for the duration of the contract based on the percent of work completed throughout the month. During the project set up and kick off with the client, we walk through the billing cycles and invoice process to ensure a mutual understanding prior to beginning work on the project. Invoices are generally sent at the beginning of the month and if discussed in advance, we can make adjustments to workflow to accommodate project needs and billing cycles. Our standard billing practices.  In the event a client requires leasing or financing options, ALPHA is open to learning more about the client’s needs. The fee for our software subscription is billed annually.
51	Briefly describe your proposed order process. Include enough detail to support your ability to report quarterly sales to Sourcewell as described in the Contract template. For example, indicate whether your dealer network is included in your response and whether each dealer (or some other entity) will process the Sourcewell participating entities’ purchase orders.	We currently report monthly sales to GSA for our GSA Schedule / MAS contract. We have created line items in our accounting system to easily track when a project is associated with a particular GSA Schedule SIN, and would envision following a similar path for Sourcewell. We would create a line item specific to Sourcewell that would easily indicate if a particular project will follow the Sourcewell process and remittance of the Administrative fee.
52	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?	ALPHA accepts P-Card procurement and payment process. There is a convenience fee of up to 4% depending on type of procurement card.

**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 Sourcwell Price and Product Change Request Form.

Line Item	Question	Response *	
53	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcwell discounted price) on all of the items that you want Sourcwell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	Attached is our proposed pricing information, which provides standard pricing data and Sourcwell discounted pricing information. We have also provided a SKU for each item in our proposal. The pricing information document has been uploaded into the Sourcwell procurement portal.  We know our pricing will be competitive. We have never failed to negotiate an agreement on fee with a client who wanted us to provide their software solution and services to populate their system. And we have never asked for a change order that wasn't a direct response to our client's request to change the scope of work.	*
54	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	Our pricing sheet reflects an 8% discount off the published list price for services, and 15% discount for the capital planning, environmental planning and workforce readiness management software.	*
55	Describe any quantity or volume discounts or rebate programs that you offer.	Our price list incorporates an effective rate reduction based on economies of scale for portfolios with large square footage values. No additional discounts are offered at this time.	*
56	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.	Requests for sourced, open market or nonstandard options are available upon request and a custom quote will be developed.	*
57	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 costs are included in our price list.	*
58	If freight, delivery, or shipping is an additional cost to the Sourcwell participating entity, describe in detail the complete freight, shipping, and delivery program.	Not applicable.	*
59	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	Not applicable.	*
60	Describe any unique distribution and/or delivery methods or options offered in your proposal.	None.	*

**Table 12: Pricing Offered**

Line Item	The Pricing Offered in this Proposal is: *	Comments
61	b. the same as the Proposer typically offers to GPOs, cooperative procurement organizations, or state purchasing departments.	The proposed fees for services and software offered to Sourcwell represent highly competitive market pricing. These rates are being offered based on our understanding of market demand for our service offerings and software from Sourcwell participating entities and vendors and projected sales volume.

**Table 13: Audit and Administrative Fee**

Line Item	Question	Response *
62	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.	ALPHA Facilities Solutions, LLC has systems in place to verify and setup projects in our Accounting System. These procedures directly relate to contract documents, which ensures the project setup is correct and follows Generally Accepted Accounting Principles, GAAP. ALPHA has a segregation of duties which allows for a check and balance with project setups before they are active. These policies and procedures are viewed regularly and updated as needed or as industry standards change. During our annual financial audit, our external auditors examine project setups and test the process from contract award, project setup, and tests that revenue recognition complies with GAAP. Additionally, our Accounting System segments cost between direct, indirect overhead and general and administrative to assist in the development of rates. Our Accounting System has a robust project accounting reporting to ensure quarterly reporting and accounting for administrative fees.
63	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.)	We propose an administrative fee of 3% and that the fee will be calculated as a percentage of the Vendor's sales under the contract.

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

Line Item	Question	Response *
64	Provide a detailed description of the equipment, products, and services that you are offering in your proposal.	<p>We believe the services and products we are offering are a direct match for what is being required in the RFP and are commonly desired or are driven by decision-making authorities, boards, communities, regulatory requirements or represent industry best practices.</p> <p>We are offering Sourcewell participating entities with facility condition assessment, planning and related services together with state-of-the-art software solutions. Our software solutions include hosting, customization, integration, implementation, installation, maintenance, training, data collection, import, export and backup, record-keeping and reporting, mobile, cloud and web-based applications or platforms, customer service, auditing, compliance, security, and technical and user support.</p> <p>Our capital, environmental planning and workforce readiness software and services provide a wide array of products at lower prices and with a better value than what would ordinarily be offered to a single entity.</p> <p>Outlined below please find detailed descriptions of our services and technologies solutions offered within our proposal:</p> <ol style="list-style-type: none"> <li>1. Facility and Building Condition Assessment</li> </ol> <p>Parametric Based Facility Condition Assessment (FCA)– Facility owners and managers need to know how well the buildings, equipment, and systems under their responsibility are performing. Maintaining up-to-date condition information on these assets enables your organizational leadership to optimize their capital renewal decisions. ALPHA's Facility Condition Assessment (FCA) services provide your organization with current first-hand assessments and condition indexes to provide insight on where each of your facilities are within their life cycle. We also provide forecasts for the remaining useful life of each system within each building so you can make informed decisions on future repairs or replacement.</p> <p>Virtual Facility Condition Assessment (Client Supplied Data) An ALPHA asset management expert will meet with you at your office to assist in organizing your facility information so that it can be quickly and efficiently uploaded into your Capital Planning Software. ALPHA will work with you to confirm cost and life cycle information so that you can generate reports that can be used in presentation materials summarizing building facility condition indices and financial needs. These reports are intended to support facility-planning activities associated with developing the next fiscal year budget.</p>



BUILDERTM -based Facility Condition Assessment - A Facility Condition Assessment (FCA) is one of the foundational processes of a facility life cycle asset management program. The FCA process results in a better understanding of the physical condition and readiness of an organization's buildings along with the reliability of its systems and components. It also facilitates the identification of work candidates for facility repair projects. It is a critical aspect of the shift towards a proactive versus reactive facility management strategy. Instead of keeping facilities operational by relying primarily on corrective repairs (after a system or component has failed due to significant loss of function), it focuses on condition-based repairs which can be planned prior to failure. A condition-based approach can result in higher performing facilities at lower life cycle costs. The FCA will be conducted using the US Army Corps of Engineers BUILDER Engineered Management System (EMS). The BUILDER facility condition assessment process results a highly standardized and credible DoD asset management program. It supports better buying power by allowing organization leadership to better target fiscal resources to those facilities most in need of investment. Further, adopting a standard process helps ensure that condition data is justifiable and defensible. [Talk about the on-site assessment process here.]

Real Property Inventory - Real Property Inventory is identifying current assets at a site and having the knowledge to distinguish assets as found-on-sites. A Real Property Inventory is designed to recognize, quantify, and record assets of ownership. Accurate recording of the real property inventory helps to budget for preventative maintenance, disposals and capital improvements. Tools we employ include Google Earth, measuring instruments, data collection software, and cameras.

The information gained from a Real Property Inventory exercise can help to organize the collection of the information for producing informative reports that assist decision makers with budgets and capital development.

Real Property Inventory (RPI) Audits - ALPHA Facilities Solutions prepares Real Property records for Chief Financial Officer's Act (CFOA) audits. These tasks include a detailed review of your real property records and assets and an analysis of all assets documented in the database of record. We identify real property assets having insufficient support documentation and research sources for sufficient documentation that include site validations and inventory to secure placed in service dates, size, site & category codes, and calculating depreciated PRV. We reconcile discrepancies identified in the migration from the legacy Integrated Facilities System (IFS) to the General Fund Enterprise Business System (GFEBs) and Prepare DD Forms 1354 and Memos of Attestation.

## 2. Energy, utility, and emissions assessment and planning

ALPHA can help you determine how much energy your facilities are using, where it is being used at an individual facility, and what energy savings opportunities exist, along with estimates of the investment required, and annual savings expected, for each opportunity.

We will develop actionable recommendations by collecting and analyzing your facilities' utility bills and determining total energy usage, conducting a site analysis to identify energy savings opportunities, and performing calculations to estimate the cost/benefit of the energy savings opportunities.

Energy Audit (Level 1) - The scope includes a site visit and staff interview to develop a basic understanding of the type of equipment present in the building and the mode of operation of that equipment. The deliverable is a brief report, outlining in bulleted form the equipment/operation identified, the typical energy consumption of such, and potential options to reduce consumption.

Energy Audit (Level 2) - The scope includes an advanced analysis of the equipment inventory that is an optional part of an FCA. For each identified make, model and serial number, the capacities and efficiencies are determined and an upgrade to 2015 International Energy Conservation Code (IECC) efficiency is assessed in terms of various financial parameters.

The deliverable is a spreadsheet listing each piece of equipment and – at least – the Net Present Value (NPV) and the Internal Rate of Return (IRR) of said upgrade to 2015 IECC or beyond.

Energy Audit (Level 3) - The scope is that of a traditional ASHRAE Level I, II or III Energy Audit. Level I includes a site visit, staff interview and cursory utility bill review in order to identify energy efficiency issues with the building. Any identified issues are categorized as low, medium or high cost to remedy based on a qualitative estimate. Level II includes the scope of Level I and adds detailed performance calculations and financial analysis for select Energy Conservation Measures (ECM) and Power Generation Opportunities (PGO). A review of Building

Automation System (BAS) trends is usually required to gather enough data for a quantitative estimate. As such, Level II is a backward-looking assessment, making use of past data. Level III includes the scope of Level II and adds sub-metering and/or whole building energy modeling for ECM or PGO which require a large outlay of capital. As such, Level III is a forward-looking assessment, making use of future data. A substantial data acquisition or model generation period without much immediate output is typical for this level. The deliverable is a comprehensive report for each building, with complexity and period of performance increasing successively from Level I through Level II and then Level III.

### 3. Site, safety, and code inspection

#### Infrastructure Assessments

The ALPHA team will estimate replacement values, estimate maintenance costs and frequencies, and develop a renewal schedule for infrastructure systems. We provide repair recommendations and cost estimates that are designated and grouped either as a repair item or a capital project. Life cycle cost analysis and remaining useful life is then used to develop repair and replacement recommendations. Systems included in an infrastructure assessment are roadways, parking lots, site development, water supply, landscaping, sewer systems, heating, cooling, fuel and electrical distribution, and site lighting.

#### Pavement Condition Assessments

ALPHA performs physical condition assessments of paved surfaces to document the current conditions. Typical assessments include vehicle and pedestrian pavements and sports courts. When as-built site drawings are not available, ALPHA calculates quantities of paved areas needing repair or replacement by digitizing marked-up Google Earth aerial photographs.

Abbreviated Accessibility Assessment (To be performed in conjunction with a facility condition assessment)- An Abbreviated Accessibility Survey can be added to your Facility Condition Assessment (FCA) to provide a preliminary capital planning budget for addressing accessibility related deficiencies. The approach to performing the Abbreviated Accessibility Survey is based on elements of the Americans with Disabilities Act (ADA) section of the ASTM-E2018 Baseline for Property Condition Assessment (PCA) standards and other industry recognized accessibility guidance documents.

Environmental Planning Solutions - ALPHA is well-positioned to provide your organization with any environmental assessments necessary to identify and manage environmental risks within the facility infrastructure. ALPHA's staff has performed numerous industrial hygiene services including:

- Asbestos Inspection and Management
- Lead Based Paint Inspection and Management
- Mold Inspection and Management

Asbestos Inspection, Abatement Design and Oversight - ALPHA performs all types of asbestos investigations and testing including U.S. Environmental Protection Agency (EPA) Asbestos Hazard Emergency Response Act (AHERA) surveys for schools, EPA National Emission Standards for Hazardous Air Pollutants (NESHAP) inspection for renovation and demolition projects, American Society for Testing and Materials International (ASTM) standard asbestos inspections including Baseline, Pre-Construction and Comprehensive asbestos surveys. ALPHA's employees have performed building inspections for a full spectrum of clients including hospitals, schools, commercial, residential, industrial, and government facilities. Our inspectors are highly experienced and can work with minimal disruption to your day-to-day business.

ALPHA develops Asbestos Abatement Project Designs that include drawings and project specifications. ALPHA assists in publishing the bid documents and the selections process to obtain a qualified asbestos abatement contractor to remove the asbestos.

ALPHA performs 3rd Party Abatement Oversight of the abatement contractor to ensure the project scope of work is adhered to and ensure the abatement contractor meets all regulatory requirements. ALPHA collects air samples to ensure exposure levels are below requirements set forth by Occupational Safety and Health Administration (OSHA). Environmental air samples can be collected and analyzed to ensure other building occupants are not incidentally exposed. Final clearance samples are collected and analyzed to ensure area is safe for re-occupancy.

Lead in Water and Lead Based Paint - ALPHA has performed Lead Surveys to meet various regulatory requirements. Our trained technicians have experience working in Public Housing, Child Occupied Facilities, and also have experience in commercial, residential and industrial sites. Our technicians have experience using X-Ray Fluorescence (XRF) lead analyzers (various manufacturers) and also have

experience performing testing lead in drinking water, lead-based paint chip testing and Toxicity Characteristic Leaching Procedure (TCLP) sampling to characterize deconstruction waste for disposal.

Mold - ALPHA's employees have performed mold surveys to meet various occupant and owner requirements. Our trained technicians have experience working in Public Housing, Child Occupied Facilities, and also have experience in commercial, residential and industrial sites. Alpha's technicians are experienced in Targeted Sampling, Mold Screens, Comprehensive Mold Surveys, Clearance Testing and Post Clearance Testing.

#### Playground Safety/Compliance Inspections

A playground safety/compliance inspection is a low frequency, comprehensive analysis of the playground environment using the most current guidelines and requirements published by the U.S. Consumer Product Safety Commission and American Society for Testing and Materials (ASTM). The inspection may also include an assessment of compliance with the Department of Justice's Standards for Accessible Design.

Inspections are performed by qualified personnel possessing a current Certified Playground Safety Inspectors (CPSI) Certification from the National Recreation and Park Association (NRPA) using a CPSI Inspection Kit.

#### 4. Space utilization and planning

Space/Facility Use Studies (FUS) provides an accurate graphic and non-graphic record of facility utilization data and Computer-Aided Design (CAD) floor plans. Floor plans include permanent and semi-permanent partitions, an accurate depiction of wall thickness, windows and doors, room numbers, room use, stairs, and other architectural features such as toilet partitions, water closets, urinals, sinks and lavatories, drinking fountains, built-in cabinetry, etcetera. Each space on the floor plan is labeled with a room number, area (in both square feet and square meters if desired), and description (office, restroom, corridor, corridor, etcetera). Naming conventions can include both current use (displayed by default) and designed use if current use is different than that for which the space was designed.

#### 5. Feasibility, sustainability, and lifecycle assessment

Sustainment Services- ALPHA offers a wide range of feasibility, sustainment, restoration and modernization services - Sustainment services focus on maintenance and repair activities necessary to keep an inventory of facilities in good working order. It includes regularly scheduled adjustments and inspections, preventive maintenance tasks, and emergency response and service calls for minor repairs. It also includes major repairs or replacement of facility components (usually accomplished by contract) that are expected to occur periodically throughout the life cycle of facilities.

Restoration Services focus on developing a plan to restore facilities to such a condition that it may be used for its designated purpose. Restoration includes repair or replacement work to restore facilities damaged by inadequate sustainment, excessive age, natural disaster, fire, accident, or other causes.

Modernization Services include developing a plan that focuses on the alteration or replacement of facilities solely to implement new or higher standards, to accommodate new functions, or to replace building components that typically last more than 50 years (such as the framework or foundation)

Water Resource Management - is defined as the activity of planning, developing, distributing, and managing the optimum use of water. It is also considered a sub-set of water cycle management and includes the management of resources under set policies and regulations.

ALPHA specializes in assessments, analysis and alternate management practices and technology planning in the areas of water conservation through irrigation system management solutions for your real property assets. With advancements in improved irrigation technologies, owners are experiencing significant water usage reductions, decreased maintenance costs, and an increase of available funds that can be directed to other priorities. Pilot studies performed across the country where new irrigation technologies have been implemented, are seeing water usage reductions by as much 65%, with the national average hovering at 30%. Even facilities that have implemented minimal technologies are seeing 5-15% reductions. ALPHA can help you take your water resource asset management practices to the next level of your overall asset management best practices.

Furthermore, with many of clients realizing that water, which was once an abundant natural resource, is quickly becoming a more valuable commodity, they are also

realizing that proper stewardship of this resource belongs to each one of us, and its use within facilities can be a major factor. ALPHA can help facility owners understand their current water consumption rates based off of their current facility and infrastructure demands and help create a water management plan that will reduce their overall usage. These reductions provide three-fold benefits, increased water efficiency, reduction in utility costs, and an increase in available funds which can be used in other areas of facility asset management and, or organizational operations.

6. Asset, capital, and deferred maintenance planning

Facility Equipment Inventory – With ALPHA's asset data collection solution, we will prepare an inventory of major building related equipment including all relevant asset information and an estimate of its remaining useful life. Our inventory consists of fixed, visible, and accessible building equipment including HVAC, electrical, plumbing, commercial-grade kitchen, commercial-grade laundry, life safety, and conveying equipment. Data for each piece of equipment will include item, manufacturer, model, serial number, date placed into service, condition, remaining useful life, notes, and replacement cost. With ALPHA's optional barcode tagging service, we can tag each piece of equipment with its own individually numbered adhesive label.

Geo-Location Services (To be performed in conjunction with equipment inventory) - In conjunction with the equipment inventory for external fixed assets, each of the fixed assets will be geo located and a latitude and longitude coordinate will be assigned within GIS for mapping purposes. Layering options will need to be specified prior to asset collection.

Equipment Barcode Tagging Service (To be performed in conjunction with equipment inventory) - During the equipment inventory collection, a highly durable adhesive barcode tag will be affixed in a prominent, readily viewable location upon (or in immediate proximity to) each piece of inventoried equipment. The barcode will contain a unique identifier to help your technicians differentiate pieces of similar equipment as they perform maintenance requests. Information collected for your equipment will be permanently associated with the barcode number and can be called up with any work order management application that uses barcode scanning capabilities.

Preventative Maintenance Schedule - A preventive maintenance (PM) schedule helps Facility Managers proactively perform maintenance, repairs, and replacements to prevent failures before they occur. ALPHA's PM Database generates baseline PM schedules for each asset on your equipment inventory and makes recommendations of the frequencies, start dates, and PM considerations. PM scheduling helps your Facility Managers avoid unplanned downtime through proactive equipment maintenance.

As part of this service, ALPHA will work directly with you to review your PM schedules, tasks, and assigned work delegations. We will help you establish PM priorities tailor your PM schedule to suit your facility needs.

Building Information Modeling (BIM) - Our FAM professionals' talents intersect synergistically yielding best in class FAM capabilities and practices. Clients may engage our talents at any point in the cycle of their facility management (FM) practices. Our services range from beginning with using their existing BIM/CAD, or creating as-built e-records integrating key work flows and business intelligence (BI) between their operations and maintenance, planning, design, and construction management functions. We also engage in the formative stages of the design process by creating lifecycle cost models as one of many templates typically used in BIM based design processes.

Computer-Aided Design (CAD) - Computer-aided Design (CAD) or computer-aided design and drafting (CADD), is the technology used by architects, engineers, drafters and others to create precision drawings or technical illustrations. CAD and CADD software can be used to create two-dimensional drawings or three-dimensional models to help users explore design ideas and visualize concepts quickly and efficiently.

Up-to-date and accessible site and floor plans have many practical uses. For example, current site plans can be used to estimate costs for grounds maintenance and site infrastructure projects, develop snow removal plans, and master planning while up-to-date floor plans can be used for space planning, estimating scope and costs for renovation projects and custodial services contracts. When the conversion from hard copy to electronic is completed, record drawings can be safely stored, easily accessed, and backed up efficiently and space within the building formerly used for hard copy record drawing storage can be used for other purposes.

## 7. Benchmarking services

Benchmarking - You can compare the condition of your facilities to other organizations. You can refine the comparison by limiting the other organizations to those in the same vertical market, similar square footage, average age of the facilities, replacement cost of the facilities, or the number of buildings. The data can be presented as a percent (your organization is in the top 45%) or graphically.

Data Analysis - ALPHA can perform enhanced analytics on your data. We can integrate the condition data with other data types, like geolocation information or student populations. We can provide data on how much it would cost to reach a specific condition.

ALPHA can also generate customized, defensible, comprehensive asset management plans. ALPHA will work with the client to define the Key Performance Indicators (KPI) that will be used to measure the facility's performance. ALPHA will work with the client to identify the existing projects and projected budgets. ALPHA will generate a capital spending plan that will identify the budget required to meet the desired KPI states or get as close as possible given a specific budget.

## 8. Project selection, budget development, and program management services related to the solutions described above

Project Selection, Budget Development and Program Management – In conjunction with facility condition assessment services, we develop a list of recommended projects for improvements, repairs, renovations, and capital improvements.

Project recommendations include an estimated cost.

Projects address all deficiencies and are categorized by priority levels 1 – 5.  
Priority 1: Critical (Immediate)

Priority 2: Potentially Critical Conditions that inhibit the operation of the building.

Priority 3: Deteriorating Conditions that require scheduled attention to mitigate deterioration to prevent future potentially critical conditions.

Priority 4: Recommended Projects that represent a functional improvement to the existing conditions or that improve the aesthetics.

Financial Management - Our people have extensive experience providing financial management services including Audit Readiness and Sustainment, Risk and Internal Controls, Financial Statement Preparation and Reporting, Business Process Improvement, and Information Technology (IT) Controls. ALPHA leverages these experiences to assist our clients with meeting the complex needs of the Financial Accounting Standards Board (FASB), Federal Accounting Standards Advisory Board (FASAB), and Chief Financial Officer's (CFO) Act. In addition, ALPHA leverages these experiences to assist our client with meeting the regulations put out by the Securities and Exchange Commission (SEC), Government Accountability Office (GAO), and Office of Management and Budget (OMB). We help clients meet and maintain compliance with accounting and financial management standards while continuing to achieve the entity's mission and vision.

## 9. Capital Planning Software Solution – Asset Performance Planning Solution (APPS)

Asset Performance Planning Solution (APPS)– The APPS web-based application has been developed by ALPHA Facilities Solutions to collect, manage, and evaluate large volumes facility condition data associated with your organization's capital improvement program. APPS employs a robust SQL-based scalable relational database engine. This software application forecasts backlog and capital renewal requirements; providing quantifiable and defensible justification for capital funding requests. APPS has the capability to serve as a foundational element of your Capital Renewal and Deferred Maintenance (CRDM) program.

Designed for use by Facility Managers and their staff, APPS provides a straightforward and reliable method for inventorying, estimating, tracking, and updating facility deficiencies. APPS' built-in quality control functions assure the accuracy and uniformity of data entry, analysis, and reporting.

### Product Features:

- Non-proprietary
- Simultaneous user access
- User-based Security
- Compatible with existing software applications such as CMMS and BIM systems
- Standardized reports, including:

- o Summarized costing information
- o Individual deficiency details
- o Forecasted renewal costs by year
- o Flexible data sorting to meet user requirements

**Product Description:**

APPS provides a user-friendly tool for capital forecasting, comprehensive deficiency tracking, building system life cycle forecasting, asset tracking for major fixed equipment, and adjustable cost data using industry standard cost databases. These features help facility management staff efficiently develop cost estimates for long range capital planning.

APPS uses a robust scalable relational database engine based on SQL that is Open Database Connection Compliant (ODBC) and accessible as a true Application Service Provider (ASP) application. As a web-based application, it is independent of the user's operating system and device. It is non-proprietary and forward compatible with evolving technologies. APPS performs equally well on a PC, or tablet on any major operating system. The number of concurrent users is scalable, and the server hardware will be customized to support your user community.

**Application Use:**

Facility assessors enter basic portfolio information into the database such as facility names, construction dates, and building gross square footage. They then input building system renewal histories, current system conditions, and the estimated system lives based on industry standard libraries or historical knowledge. The application will compute the projected years of the next replacements for each system. (Users have the capability to overwrite automated projections if desired based on user knowledge.) APPS will also calculate replacement costs of each system based on standard cost data for the year replacement occurs. Assessors can enter notes, photos and other key attachments directly into the application. Users can also enter fixed equipment assets into APPS. APPS can maintain many attributes of the equipment inventory, including photos and other attachments. APPS will forecast upcoming equipment replacement dates and will provide replacement cost estimates.

Users can also conduct an abbreviated ADA assessment. Any ADA deficiencies can be recorded in APPS as individual needs.

Once complete, APPS will evaluate all the facility data and calculate Facility Condition Indexes (FCI) for each building as well as for the total portfolio. Results can be provided through a wide variety of reporting formats based on user preferences. Reporting formats include spreadsheets, narrative reports, tables, charts and other graphic visualizations. All reports can be exported in PDF format. Other custom reporting formats are available through ALPHA's software team to meet users' individual reporting requirements.

**APPS Dashboard**

The Dashboard presents simplified views of the data including data presented in a tabular form which can be rearranged, sorted, filtered, grouped and exported; and tables and plots that can be embedded into reports and presentations.

**10. Environmental Planning Software Solution – MP Prime™**

MPPrime™ Environmental Data Management Solution – MPPrime™ is a state-of-the-art, cloud-based environmental compliance tool used to collect, report, and manage data pertaining to regulated materials (e.g., asbestos, lead-based paint, universal waste and other indoor environmental hazards) present at your facilities. Maintaining material information within the MPPrime™ database streamlines your environmental compliance program by allowing you to centrally manage your data and quickly generate EPA-compliant reports and management plans. Reporting can also be customized as needed to suit your organizations specific requirements.

**11. Workforce Readiness Software Solution – Advanced Skills Management industrial (ASMi)**

Advanced Skills Management Industrial (ASMi) is a cloud-based solution that helps organizations quickly and confidently configure training paths, learning objectives and work schedules based on job requirements. By tracking individual and group progress, verifying training milestones and reporting on your team's progress, leaders gain true visibility into their organizational readiness. In one organized repository, you can capture and monitor personal records associated with computer-based training, job performance, on-the-job training, interactive work history and exams.

ASMi key benefits are reduced liability, system flexibility, qualification data, and

		<p>improved efficiency. Manage risk and mitigate liability with easily accessible evidence of readiness. Uncover weaknesses to drive specific, targeted training and corrective action.</p> <p>Assimilate existing paper records and recreate and transform processes into a formal system. Organize and improve existing business practices and standardize training information in one repository.</p> <p>Interactive dashboards and real-time analytics make it easy to track qualifications using role-based access and management. View organization wide qualification levels down to the individual and update requirements as necessary.</p> <p>Take back time in your day and remove administrative delays of pushing paper. Aggregate multiple spreadsheets, datasets, and processes within the system and access detailed reporting under comprehensive dashboards.</p> <p>Ensuring personnel readiness is essential within government organizations but if your system is difficult to maintain or doesn't offer the right level of visibility, errors can be made that cause your department serious liability issues and compromise your compliance. ASMi enables you to plan, build, manage and assess your team's readiness within a single, authoritative dashboard.</p>
65	<p>Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.</p>	<p>Our asset management services together with our capital, environmental planning and workforce readiness software provide a wide array of products at lower prices and with a better value than what would ordinarily be offered to a single entity.</p> <p>Included below please find the sub category titles that best describe our products and services, and are shown in our pricing sheet.</p> <p>Services</p> <ul style="list-style-type: none"> <li>• Facility Assessments             <ul style="list-style-type: none"> <li>o Educational Facility Portfolios</li> <li>o State/Municipal Facility Portfolios</li> <li>o Healthcare Facility Portfolios (Senior Living)</li> <li>o Healthcare Facility Portfolios (Hospital)</li> <li>o Parks and Recreation Portfolios</li> </ul> </li> <li>• Environmental Services             <ul style="list-style-type: none"> <li>o Educational, Residential, Administrative Facilities</li> <li>o Healthcare Facilities</li> <li>o Light Industrial Facilities</li> </ul> </li> <li>• Miscellaneous Asset Management Services             <ul style="list-style-type: none"> <li>o Parametric Based Facility Condition Assessments</li> <li>o Real Property Inventory</li> <li>o Real Property Inventory (RPI) Audits</li> <li>o Infrastructure Assessments</li> <li>o Pavement Condition Assessments</li> <li>o Playground Safety/Compliance Inspections</li> <li>o Space/Facility Use Studies</li> <li>o Sustainment Services</li> <li>o Restoration Services</li> <li>o Modernization Services</li> <li>o Water Resource Management</li> <li>o Building Information Modeling (BIM)</li> <li>o Computer Aided-Design (CAD) Services</li> <li>o Benchmarking Services</li> <li>o Data Analysis Services</li> <li>o Project Selection, Budget Development and Program Management</li> <li>o Financial Management and Audit Readiness</li> </ul> </li> </ul> <p>Software</p> <ul style="list-style-type: none"> <li>• ASMi Software for Skilled Workforce Management</li> <li>• APPS             <ul style="list-style-type: none"> <li>o Public K12 Schools</li> <li>o Private K12 (Non-Boarding)</li> <li>o Higher Ed w/ Housing, Private Boarding</li> <li>o Government</li> <li>o Healthcare</li> </ul> </li> <li>• MPPPrime             <ul style="list-style-type: none"> <li>o Public K12 Schools</li> <li>o Private K12 (Non-Boarding)</li> <li>o Higher Ed w/ Housing, Private Boarding</li> <li>o Government</li> <li>o Healthcare</li> </ul> </li> <li>• Training</li> </ul>

**Table 14B: 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
66	Facility and building condition assessment	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>At ALPHA, we have one business – Asset Management. Facility and building condition assessments are a core service offering. Our work products have undergone the scrutiny of Congress and have helped our clients secure more than \$9 Billion in funding for facility repairs, renovations and replacements.</p> <p>In support of our asset management services, we are offering our capital planning software known as Asset Performance Planning Software. This powerful combination of service and software presents a robust Asset Management Software planning product. This integrated offering provides a unique value add to Sourcewell participating entities because we bring together our software and services expertise to merge separately managed and budgeted realms of Capital Planning, Operations and Maintenance and other major programs such as environmental planning, bond planning, energy planning etc. by documenting holistic needs and accountable measures of success.</p>
67	Energy, utility, and emissions assessment and planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	ALPHA offers a complete suite of energy and related assessment services including ASHRAE Level 1, 2 and 3 audits, energy modeling, and utility gap analysis.
68	Site, safety, and code inspections	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA offers a complete suite of site, infrastructure, accessibility, environmental and tree and playground assessments.</p> <p>In support of our environmental services, we are offering our MPPPrime environmental planning software. ALPHA's services and software offer a unique value add to Sourcewell participating entities because we transform services and software into a turn-key solution.</p>
69	Space utilization and planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	ALPHA offers a full suite of space utilization, space planning, capacity, BIM and CADD services.
70	Feasibility, sustainability, and lifecycle assessment	<input checked="" type="radio"/> Yes <input type="radio"/> No	ALPHA offers a full suite of feasibility, sustainability and lifecycle assessments. With every facility condition assessment, we offer our clients the ability to develop plans to sustain, restore and modernize their building portfolios. Our software solutions support expansive data analytics, the generation of key performance indicators and other visuals to develop compelling, persuasive data sets to secure additional funding, grow maintenance staff and garner support from decision making groups.



71	Asset, capital, and deferred maintenance planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Built Environment - ALPHA offers a full suite of asset, capital and deferred maintenance services. We feature equipment inventory, barcode tagging, preventative maintenance schedule development and turn-key software implementation services. Our work products and deliverables result in fully implemented capital planning programs, work order management systems and executable project plans. Our clients hire us because they need to transform their reactive maintenance programs to reactive programs. They are tired of their projects picking them.</p> <p>Our turn-key approach of coupling asset management services with technology solutions is the winning combination that supports timely system implementations and allows our clients to immediately begin building their capital planning and maintenance and operations programs.</p> <p>Workforce Readiness Management – All areas of our clients' asset management processes need people—the workforce. No matter the size of the organization, there is a need to carefully manage the requirements of the mission they serve and the skilled workforce that leads, implements, manages and executes all aspects of asset management. In concert with the many key elements of Human Resource Management, skills management is asset centric. There can be no effective or efficient tangible or intangible asset management without workforce skills management.</p> <p>Workforce readiness management enables an organization to inventory the talent and expertise of the workforce and reconcile it against the needs of the organization and support mission readiness. Goals can be set to address specific skill needs and then compared against actual staffing to identify gaps. It also provides greater visibility into real-time readiness of selected personnel and/or capabilities. Having the ability to plan to know where talent and expertise will be needed can serve as the foundation for establishing mission critical training and educational programs that can be certified and offer growth potential to motivate the workforce. Benefits include:</p> <ul style="list-style-type: none"> <li>▪ Critical Skills Management: Inventory and reconcile the talent and expertise of the workforce against the needs of your organization to support mission readiness.</li> <li>▪ Connecting the Enterprise: Realizing the benefits of a centralized database to automate, track and manage all of the workforce readiness processes all from within a single web-based application.</li> <li>▪ Managing Training: Managing and tracking personnel training can be a time consuming and overwhelming. Ensuring your workforce training credentials are accurate is important when assessing the next mission's needs and knowing who on your team has the necessary skills for execution.</li> <li>▪ Tracking Certifications: As new members of your workforce arrive, tracking and maintaining their training, experience and qualifications is critical in establishing their baseline.</li> </ul> <p>Advanced Skills Management industrial (ASMi) - In support of our asset management services, we are offering our Workforce Readiness software solution. ALPHA's services and software offer a unique value add to Sourcewell participating entities because we transform services and software into a turn-key solution.</p>
72	Benchmarking services	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ALPHA offers a comprehensive suite of benchmarking and data analytic services. Our in-house team of data scientists lead these efforts. ALPHA has compiled a data set from education, state, municipal, healthcare, hospitality and federal client databases. This data set allows us to generate comparative analysis to help our clients compare the condition/performance of their facilities to other organizations within the same vertical market, similar size, age etc.</p>

73	Project selection, budget development, and program management services related to the solutions described above.	<input checked="" type="radio"/> Yes <input type="radio"/> No	ALPHA's asset management services feature a set of project deliverables that features a list of recommended projects for improvements, repairs, renovations, and capital improvements. Project recommendations include an estimated cost and are assigned priority levels 1-5.
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**Table 15: Industry Specific Questions**

Line Item	Question	Response *
74	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.	<p>From an overall service perspective on contract performance, we will measure the following:</p> <ol style="list-style-type: none"> <li>1. Client satisfaction</li> <li>2. Client referrals</li> <li>3. Accuracy of Deliverables</li> <li>4. On-Time Deliveries</li> <li>5. Ongoing Engagements</li> </ol> <p>From an overall sales perspective on contract performance, we will measure the following:</p> <ol style="list-style-type: none"> <li>1. Annual Sales (by Client and Revenue)</li> <li>2. Annual Sales by Market (by Client and Revenue)</li> <li>3. Annual Sales by Service (by Client and Revenue)</li> <li>4. Annual Per Client Contract Volume</li> <li>5. Recurring/Repeat Sales (by Client and Revenue)</li> <li>6. Annual Administrative Fees to Sourcewell</li> </ol> <p>From a software perspective, a ticketing system will be implemented for all applications to track and measure issues reported by the client. The ticketing system is integrated into the application, so clients do not have to leave the application to submit tickets. The ticketing system also provides the user a screen capture tool which will provide the user with the ability to capture an image of the screen to submit with the ticket. The ticket will be evaluated to determine if there is a training issue or application issue. This will allow ALPHA to reach out to clients to determine if they fully understand application functionality or the application is not functioning to meet user needs. All applications will be monitored and measured to determine uptime as well as response times to user requests. Servers are monitored 24/7 tracking bandwidth lag times as well as application availability. When bandwidth slows or the application is no longer available, E-mail messages and text messages are sent to the response team for immediate action. This information will be logged and available in reports for analysis using data, charts and graphs.</p>

75	Describe the approach(es) used by your company to align recommendations with an owner's mission, values and goals.	<p>ALPHA views every client as a client for life. Assuring our work product is in alignment with the owner's expectation is priority 1.</p> <p>ALPHA's approach to aligning recommendations with an owner's mission, values and goals begins with a mutually agreed upon scope of work. We build a project schedule that outlines a successful approach to accomplishing the work, identify milestones and set realistic timeframes for completing the work.</p> <p>We have learned through our experiences that the following considerations are critical to performing asset management services:</p> <ul style="list-style-type: none"> <li>• Develop a sound project management plan—including a robust quality assurance and control plan.</li> <li>• Develop a communication plan to please the client.</li> <li>• Clearly understand client goals and continue to validate their goals throughout the project. Circumstances may change and it's important to remain agile.</li> <li>• Promote project safety.</li> <li>• Ensure that the asset management services data collection standards are in alignment with the required project deliverables.</li> </ul> <p>Our project management approach is implemented consistently across all projects no matter the size and scope of work.</p> <p>We develop detailed, understandable scopes of work with clearly defined project deliverables. We meet on a regular basis to review our progress and address any unanticipated items requiring attention and we listen to our clients – no exceptions.</p> <p>We review project deliverables with our clients and address their comments and any requested refinements promptly.</p> <p>Our clients are our best marketing resource. They absolutely love referring their friends and colleagues to us—which serves as our confirmation that we are aligning our project recommendations with the owner's expectations.</p>
76	Describe your processes or strategies for communications with an owner at applicable project milestones or events.	<p>ALPHA focuses on customer satisfaction by assigning the appropriate asset management expertise, IT resources and software technology solution to all of our asset management service offerings. Our communication methods are established based on client preference during the project kick off and follow suit for the duration of the project. Should anything arise that needs to be addressed outside of the established communication schedule, we will reach out directly to the client in a timely fashion and request the client do the same, should a need arise.</p> <p>We hold monthly in-progress review meetings with our clients to review scope of work activities, project milestones, on and off site execution schedules, status of deliverables and overall client satisfaction.</p> <p>We also prepare detailed project status reports on a monthly basis. The project status reports are submitted to our clients with their monthly invoice. This process provides for a transparent review of how the overall project is performing and ALPHA's fiscal responsibility and accountability of billing for the services actually performed on a percent complete basis.</p> <p>This approach builds tremendous trust and assures the client that they are valued and respected. ALPHA clients are happy clients and happy clients pay their invoices on time and serve as exceptional references to others needing ALPHA services.</p>
77	Describe the approach(es) or method(s) used by your company to develop project prioritization recommendations.	<p>Establishing a Facility Condition Index - At the conclusion of our facility and/or building condition assessment, we will have established a facility condition index for each building included in the scope. We develop an FCI to quantify the deficiencies in each building. Our data is used to report the relative condition of buildings using a ratio of needed repairs (NR) over current replacement value (CRV) for the facility condition index (FCI). This ratio allows us to present a building list that is ranked from best condition to worst condition. This list will become a powerful document when planning and prioritizing remediation.</p> <p>Facility Renewal Forecasting - Long-range funding for facilities is</p>

accomplished by identifying the rate of renewal required to maintain components of each facility as it depreciates and becomes unusable.

As part of the facility renewal forecasting activities, we will:

- Analyze and model the rates of depreciation of each facility and report on the annual reinvestment rate to replace components as they exceed useful service life, and
- Determine approximate replacement cost of each building component where cumulating of components will equal the replacement value of the building.

We develop forecasts for the renewal of building systems through life-cycle analysis. These forecasts assist in the creation of budgets for capital renewal. Additionally, they allow for the long-term projection of renewal cost.

Future work is estimated by taking the cost of a particular system renewal and forecasting the date of renewal by determining the expected life.

Project Prioritization Recommendations - We collaborate with our clients to confirm the buildings which are most mission critical, followed by the building systems that are critical to maintaining building operations. Failing building systems that keep occupants warm, safe and dry can quickly shut down operations if they fail unexpectedly.

In collaboration with our clients, we develop a list of recommended projects for improvements, repairs, renovations, and capital improvements.

Project recommendations include an estimated cost.

Projects address all deficiencies and are categorized by priority levels 1 – 5.

Priority 1: Critical (Immediate) Conditions that require immediate action to:  
correct a cited life safety hazard  
stop accelerated deterioration  
return a system to proper operation

Priority 2: Potentially Critical Conditions that inhibit the operation of the building. Conditions in this priority include:  
improper or intermittent operations  
rapid deterioration  
potential life safety hazard

Priority 3: Deteriorating Conditions that require scheduled attention to mitigate deterioration to prevent future potentially critical conditions. This includes conditions that further delay may cause additional damage, higher repair costs, and/or higher operating costs. Energy conservation requirements not included in priorities 1 or 2 will be included in this priority.

Priority 4: Recommended Projects that represent a functional improvement to the existing conditions or that improve the aesthetics. These improvements are not generally required for the most basic functionality of the facility. However, these recommended actions may improve the overall facility function and/or reduce long-term maintenance costs. This priority includes building components that have exceeded their useful life, but still operating with no or little deterioration.

78	Describe your offerings in terms of addressing an owner's sustainability goals or targets .	<p>At the conclusion of a facility and/or building assessment, we will review the facility renewal forecast schedule with the owner to learn more about their current sustainment budgets, goals and targets. We will develop funding scenarios that will allow the owner to evaluate:</p> <ul style="list-style-type: none"> <li>• The appropriate level of reinvestment is necessary to maintain current building conditions</li> <li>• The potential deleterious impact building conditions if reinvestment is underfunded</li> <li>• The optimum amount of funding to assure the building portfolio maintains operations for their intended mission.</li> </ul> <p>Our work products result in persuasive data sets that are used to successfully secure additional funding and/or hire additional staff to maintain their facilities and transform reactive maintenance programs into preventive maintenance programs. But we don't stop here.</p> <p>Once our clients receive the additional funding, pass a school bond etc., we are available to help keep their capital planning and maintenance solutions updated. We assist them in annual reviews and tracking metrics to demonstrate building conditions are improving and that they are good stewards of the funding that has been provided for reinvestment into the portfolio.</p>
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**Table 16: Exceptions to Terms, Conditions, or Specifications Form**

**Line Item 79. NOTICE:** To identify any exception, or to request any modification, to the Sourcewell template Contract terms, conditions, or specifications, a Proposer must submit the exception or requested modification on the **Exceptions to Terms, Conditions, or Specifications Form** immediately below. The contract section, the specific text addressed by the exception or requested modification, and the proposed modification must be identified in detail. Proposer's exceptions and proposed modifications are subject to review and approval of Sourcewell and will not automatically be included in the contract.

Contract Section	Term, Condition, or Specification	Exception or Proposed Modification
None	None	None

## Proposer's Affidavit

### 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:
  - a. 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>;
  - b. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or

- c. 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. - John Garcia, Chief Executive Officer, ALPHA Facilities Solutions, LLC

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the 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
<b>Addendum_6_Facility_Assessment_and_Planning_with_Related_Services_RFP_020421</b> Fri January 29 2021 07:52 AM	<input checked="" type="checkbox"/>	2
<b>Addendum_5_Facility_Assessment_and_Planning_with_Related_Services_RFP_020421</b> Wed January 27 2021 03:08 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_4_Facility_Assessment_and_Planning_with_Related_Services_RFP_020421</b> Mon January 25 2021 08:08 AM	<input checked="" type="checkbox"/>	2
<b>Addendum_3_Facility_Assessment_and_Planning_with_Related_Services_RFP_020421</b> Mon January 4 2021 04:26 PM	<input checked="" type="checkbox"/>	1
<b>Addendum_2_Facility_Assessment_and_Planning_with_Related_Services_RFP_020421</b> Mon January 4 2021 10:44 AM	<input checked="" type="checkbox"/>	1
<b>Addendum_1_Facility_Assessment_and_Planning_with_Related_Services_RFP_020421</b> Wed December 23 2020 09:44 AM	<input checked="" type="checkbox"/>	1