

**Solicitation Number: RFP #071321****CONTRACT**

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

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

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

1. TERM OF CONTRACT

- A. **EFFECTIVE DATE.** This Contract is effective upon the date of the final signature below.
- B. **EXPIRATION DATE AND EXTENSION.** This Contract expires September 10, 2025, unless it is cancelled sooner pursuant to Article 22. This Contract may be extended one additional year upon the request of Sourcewell and written agreement by Supplier.
- C. **SURVIVAL OF TERMS.** Notwithstanding any expiration or termination of this Contract, all payment obligations incurred prior to expiration or termination will survive, as will the following: Articles 11 through 14 survive the expiration or cancellation of this Contract. All other rights will cease upon expiration or termination of this Contract.

2. EQUIPMENT, PRODUCTS, OR SERVICES

- A. **EQUIPMENT, PRODUCTS, OR SERVICES.** Supplier will provide the Equipment, Products, or Services as stated in its Proposal submitted under the Solicitation Number listed above.

Supplier's Equipment, Products, or Services Proposal (Proposal) is attached and incorporated into this Contract.

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

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

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

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

3. PRICING

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

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

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

A. **SHIPPING AND SHIPPING COSTS.** All delivered Equipment and Products must be properly packaged. Damaged Equipment and Products may be rejected. If the damage is not readily apparent at the time of delivery, Supplier must permit the Equipment and Products to be

returned within a reasonable time at no cost to Sourcewell or its Participating Entities. Participating Entities reserve the right to inspect the Equipment and Products at a reasonable time after delivery where circumstances or conditions prevent effective inspection of the Equipment and Products at the time of delivery. In the event of the delivery of nonconforming Equipment and Products, the Participating Entity will notify the Supplier as soon as possible and the Supplier will replace nonconforming Equipment and Products with conforming Equipment and Products that are acceptable to the Participating Entity.

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

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

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

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

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

4. PRODUCT AND PRICING CHANGE REQUESTS

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

- Identify the applicable Sourcewell contract number;
- Clearly specify the requested change;
- Provide sufficient detail to justify the requested change;

- Individually list all Equipment, Products, or Services affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
- Include a complete restatement of pricing documentation in Microsoft Excel with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Equipment, Products, and Services offered, even for those items where pricing remains unchanged.

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

5. PARTICIPATION, CONTRACT ACCESS, AND PARTICIPATING ENTITY REQUIREMENTS

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

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

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

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

6. PARTICIPATING ENTITY USE AND PURCHASING

A. ORDERS AND PAYMENT. To access the contracted Equipment, Products, or Services under this Contract, a Participating Entity must clearly indicate to Supplier that it intends to access this Contract; however, order flow and procedure will be developed jointly between Sourcewell and Supplier. Typically, a Participating Entity will issue an order directly to Supplier or its authorized subsidiary, distributor, dealer, or reseller. If a Participating Entity issues a purchase order, it may use its own forms, but the purchase order should clearly note the applicable Sourcewell

contract number. All Participating Entity orders under this Contract must be issued prior to expiration or cancellation of this Contract; however, Supplier performance, Participating Entity payment obligations, and any applicable warranty periods or other Supplier or Participating Entity obligations may extend beyond the term of this Contract.

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

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

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

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

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

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

7. CUSTOMER SERVICE

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

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

B. BUSINESS REVIEWS. Supplier 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, sales data reports, supply issues, customer issues, and any other necessary information.

8. REPORT ON CONTRACT SALES ACTIVITY AND ADMINISTRATIVE FEE PAYMENT

A. CONTRACT SALES ACTIVITY REPORT. Each calendar quarter, Supplier must provide a contract sales activity report (Report) to the Sourcwell Supplier Development Administrator assigned to this Contract. Reports are due no later than 45 days after the end of each calendar quarter. A Report must be provided regardless of the number or amount of sales during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;
- 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 Supplier.

B. ADMINISTRATIVE FEE. In consideration for the support and services provided by Sourcwell, the Supplier 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. Supplier may not charge Participating Entities more than the contracted price to offset the Administrative Fee.

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

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

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

9. AUTHORIZED REPRESENTATIVE

Sourcewell's Authorized Representative is its Chief Procurement Officer.

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

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

A. **AUDIT.** Pursuant to Minnesota Statutes Section 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this 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 party may assign or otherwise transfer its rights or obligations under this Contract without the prior written consent of the other party and a fully executed assignment agreement. Such consent will not be unreasonably withheld. Any prohibited assignment will be invalid.

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

D. **WAIVER.** Failure by either party to take action or assert any right under this Contract will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right. Any such waiver must be in writing and signed by the parties.

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

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

11. INDEMNITY AND HOLD HARMLESS

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

12. GOVERNMENT DATA PRACTICES

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

13. INTELLECTUAL PROPERTY, PUBLICITY, MARKETING, AND ENDORSEMENT

A. INTELLECTUAL PROPERTY

1. *Grant of License.* During the term of this Contract:
 - a. Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising and promotional materials for the purpose of marketing Sourcewell's relationship with Supplier.
 - b. Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising and promotional materials for the purpose of marketing Supplier's relationship with Sourcewell.
2. *Limited Right of Sublicense.* The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers,

resellers, marketing representatives, and agents (collectively “Permitted Sublicensees”) in advertising and promotional materials for the purpose of marketing the Parties’ relationship to Participating Entities. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this Article by any of their respective sublicensees.

3. Use; Quality Control.

- a. Neither party may alter the other party’s trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.
- b. Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party’s trademarks only in good faith and in a dignified manner consistent with such party’s use of the trademarks. Upon written notice to the breaching party, the breaching party has 30 days of the date of the written notice to cure the breach or the license will be terminated.

4. As applicable, Supplier 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 Supplier 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 suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell’s written directions.

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

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

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

14. GOVERNING LAW, JURISDICTION, AND VENUE

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

15. FORCE MAJEURE

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

16. SEVERABILITY

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

17. PERFORMANCE, DEFAULT, AND REMEDIES

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

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

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

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

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

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

18. INSURANCE

A. REQUIREMENTS. At its own expense, Supplier must maintain insurance policy(ies) in effect at all times during the performance of this Contract with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:

1. *Workers' Compensation and Employer's Liability.*

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

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

Minimum limits:

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

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

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

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

Minimum Limits:

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

\$1,000,000 Personal and Advertising Injury

\$2,000,000 aggregate for Products-Completed operations

\$2,000,000 general aggregate

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

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

Minimum Limits:

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

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

Minimum Limits:

\$2,000,000

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

Minimum limits:

\$2,000,000 per occurrence

\$2,000,000 annual aggregate

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

B. CERTIFICATES OF INSURANCE. Prior to commencing under this Contract, Supplier 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 Supplier Development Administrator assigned to this Contract. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf.

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

C. ADDITIONAL INSURED ENDORSEMENT AND PRIMARY AND NON-CONTRIBUTORY INSURANCE CLAUSE. Supplier agrees to list Sourcewell and its Participating Entities, including their officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is

primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.

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

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

19. COMPLIANCE

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

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

20. BANKRUPTCY, DEBARMENT, OR SUSPENSION CERTIFICATION

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

Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government or the Canadian government, as applicable; or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Contract. Supplier further warrants that it will provide immediate written notice to 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 have additional requirements based on specific funding source terms or conditions. Within this Article, all references to “federal” should be interpreted to mean the United States federal government. The following list only applies when a Participating Entity accesses Supplier’s Equipment, Products, or Services with United States federal funds.

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

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

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

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

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

F. DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689). A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. §180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names

of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

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

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

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

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

K. ACCESS TO RECORDS (2 C.F.R. § 200.336). Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.

L. PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322). A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation

and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

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

N. NO OBLIGATION BY FEDERAL GOVERNMENT. The U.S. federal government is not a party to this Contract or any purchase by an Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Contract or any purchase by an authorized user.

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

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

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

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

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

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

22. CANCELLATION

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

Sourcwell

Computer Aid, Inc.

DocuSigned by:
Jeremy Schwartz
By: C0FD2A139D06489...
Jeremy Schwartz
Title: Chief Procurement Officer
Date: 9/8/2021 | 4:58 PM CDT

DocuSigned by:
David A. Hunter
By: 2822B073E271448...
David A. Hunter
Title: Executive Vice President
Date: 9/8/2021 | 4:38 PM CDT

Approved:

DocuSigned by:
Chad Coauette
By: 7E42B8F817A64CC...
Chad Coauette
Title: Executive Director/CEO
Date: 9/8/2021 | 5:30 PM CDT

RFP 071321 - IT Managed Service and Staff Augmentation Solutions

Vendor Details

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

Submission Details

Created On: Wednesday June 02, 2021 14:50:17
Submitted On: Monday July 12, 2021 07:52:17
Submitted By: CAI PublicSectorSales
Email: PS.Sales@cai.io
Transaction #: 11ab865f-9cc8-4e91-a69a-030696051f45
Submitter's IP Address: 152.208.56.202

Specifications

Table 1: Proposer Identity & Authorized Representatives

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

Line Item	Question	Response *
1	Proposer Legal Name (one legal entity only): (In the event of award, will execute the resulting contract as "Supplier")	Computer Aid, Inc.
2	Identify all subsidiary entities of the Proposer whose equipment, products, or services are included in the Proposal.	N/A
3	Identify all applicable assumed names or DBA names of the Proposer or Proposer's subsidiaries in Line 1 or Line 2 above.	CAI has operated as Computer Aid, Inc. (CAI) for its entire history. However, when the name Computer Aid, Inc., was already in use in certain locations, we had to register with an alternate name, shown below: Arkansas: CAII, Inc. Maryland: C.A. Systems Company A/K/A Computer Aid, Inc. Minnesota: CAI, Inc. New Hampshire: Computer Aid, Inc. DBA CAII New Jersey: Computer Aid, Inc. DBA CAII, Inc. New York: CAII Texas: Computer Aid, Inc. DBA CA Systems, Inc.
4	Proposer Physical Address:	1390 Ridgeview Drive, Allentown, PA 18104
5	Proposer website address (or addresses):	www.cai.io
6	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):	David. A Hunter Executive Vice President 1390 Ridgeview Drive, Allentown, PA 18104 Abe.Hunter@cai.io 717-503-8594 (c) 717-651-3070 (o)
7	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Linda Leiby Vice President, Contingent Workforce Solutions 1390 Ridgeview Drive, Allentown, PA 18104 Linda.Leiby@cai.io 717-651-3080 (o)
8	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Christopher Tilley Director, Contingent Workforce Solutions 1390 Ridgeview Drive, Allentown, PA 18104 Christopher.Tilley@cai.io 717-651-3138 (o)

Table 2: Company Information and Financial Strength

Line Item	Question	Response *
9	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.	CAI is an \$875M leading business technology services firm committed to helping public sector and private organizations drive value, improve productivity, and enhance the customer experience. We specialize in contingent workforce solutions and staffing services, alongside helping customers digitally transform their enterprise with services that include application management, strategy and consulting, intelligent automation, IT service management (ITSM), and business analytics. Founded in 1981 and headquartered in Allentown, PA, CAI is a privately held company with offices throughout the United States and the Asia-Pacific region. We are a diverse and innovative global team known for providing right-sized strategy, solutions, and ongoing support for our customers. CAI has been a prime vendor on the Sourcwell IT Managed Service and Staff Augmentation Solutions contract since 2017. We have enrolled multiple Participating Entities nationwide, and with Sourcwell's collaboration, have enrolled the State of Iowa as a state-level participant in the Sourcwell program. This program has generated \$16.3M revenue to date plus a further \$69.1M for the State of Iowa program. CAI's Public Sector division has been supporting state, city, and local government since 1994 and accounts for 68-70% of CAI's annual revenue. We launched our first MSP in the Commonwealth of Pennsylvania in 2004, and our Contingent Workforce Solutions (CWS) practice was born. As one of the first MSP programs for state government, the successful program CAI built with Pennsylvania has been mirrored in many of the state MSP programs that followed. CAI's CWS practice focuses solely on public sector clients, supporting customers across state and local government, non-profit, and education sectors with IT staff augmentation services aligned with the requirements of the Sourcwell contract and its Participating Entities. Since its inception, our CWS portfolio has generated revenues over \$2.6B following the same best practices that Sourcwell and its Members receive under the current contract and will continue to do so under a new agreement. For CAI to achieve this mission as a leading MSP, and that of an IT leader in the public sector, we must continually develop and implement plans and programs that will enable us to achieve financial strength (fiscal health), strong culture (associate morale), and delighted customers (customer satisfaction). CAI is committed to being purpose-driven, prioritizing client success and employee well-being, and serving the community. We recognize that to be truly engaged, you must feel valued for who you are and what you contribute. We are committed to achieving excellence through celebrating our differences and collaborating on opportunities. Empowering our associates to share different

ideas, perspectives, and experiences is a driving force for elevating our success. These are our Guiding Values.

Devoid of Status-ism and Bureaucracy

CAI is a company devoid of status-ism. Each associate's role constitutes a necessary part of the whole. We cannot achieve our mission unless all associates are performing their roles with a high degree of effectiveness. We must recognize the important and worthiness of each other's work. CAI is a company devoid of bureaucracy. Decision making, wherever possible, is to be made by those parties most intimately involved with the results of the decision. Learning to seek out advice from leadership and when to move forward independently is the mutual responsibility of CAI's associates and their managers.

Collegial

The word "collegial" conjures up many different pictures. One of the most important pictures it paints is the concept of respect for differing thoughts and ideas. College is a place where existing patterns of thinking are often challenged. This process of being challenged can help us recognize the importance of each person's role and contributions. We want this aspect of the word "collegial" to define our culture. Other aspects of a collegial environment like camaraderie and fun should also define our workplace. We believe these workplace qualities are foundational to building strong and healthy teams.

Driven to Pursue Knowledge, to Learn and Grow

The pursuit of knowledge must be viewed as a life-long journey rather than a single event. This is especially true of professionals within the Information Technology (IT) industry, an industry that is constantly evolving. CAI associates must accept responsibility for the ongoing development of their skill sets. We must also actively seek to receive and transfer knowledge to our team members and the company wherever possible.

Goals for Self-Improvement

CAI is committed to the philosophy that every associate is responsible for the development and management of their career. Personal initiative, self-reliance, and ownership of one's development plan, work, and relationships are a direct result of living out this value. As associates and professionals, we must be committed to the expenditure of personal time and energy outside the workplace. We must also recognize that each day presents learning opportunities.

Continuous Improvement

The pace at which the IT industry and our business is changing, coupled with the expectations of our customers, requires each associate and the business to be dissatisfied with the way they currently perform their responsibilities. We must continually focus on improving our business practices and processes to meet the demands of a globally competitive marketplace. Continuous improvement of CAI's business, as well as the businesses of our customers, will ensure a long and prosperous future for all of us.

High Achievement Results in High Reward

CAI associates are focused on their personal performance. They are aware that the quality of their contributions will determine whether we meet our overriding business goals. Associates are also aware that helping the company achieve its goals will result in achievement of their personal goals, particularly as it pertains to personal reward and the recognition of their peers.

Commitment to Excellence

Our belief that every associate must be committed to the pursuit of excellence in his or her work goes hand in hand with our belief that we must pursue improvement through change. The fact that change is inevitable and necessary for sustained business health tells us that there is always a better way of doing business. To find this better way of doing business, each associate must be committed to the personal pursuit of excellence. We must ask ourselves what we can do to improve the quality and quantity of our personal work product. We must also ask the same questions of our teams, cost centers, regions, and the company.

Serve the Community

If our focus stops with improving the quality of our personal lives and the business of which are a part, we are a self-serving group of professionals who miss the bigger picture. With this kind of focus, we will see the demise of our communities, and the demise will affect our personal lives as well. CAI believes the business and its associates have an obligation to serve their communities so that they are stronger, healthier places in which to live and work. This service can take on many different faces. As a CAI associate, you will have many different opportunities to serve the community at large as part of the CAI team. We also encourage you to find local service opportunities through community groups, churches, temples, and synagogues.

CAI's experience in contingent workforce management, our proven record of implementing and delivering successful MSP programs, our ability to adapt our programs to changes in the industry and the needs of each Sourcewell Member, and our knowledge of Sourcewell and their goal "to help government, education, and nonprofits work more efficiently" are unparalleled by other MSP providers.

10	What are your company's expectations in the event of an award?	<p>CAI implemented the first Sourcwell (formerly NJPA) IT Managed Service and Staff Augmentation Solutions contract in 2017; a program that has seen continuous growth especially with the successful effort to bring the State of Iowa's state-wide IT staffing program under the Sourcwell banner. This success is the sign of a well-developed and well implemented solution that originated through completion of key tasks at award, setting a strong precedent.</p> <p>To ensure continuation under the new contract, CAI must complete a number of steps while leveraging the same great relationships, processes, and best practices currently in place that will ensure another successful five years.</p> <p>Our post award planning starts with Contract Kickoff meetings. This will finalize all contractual documentation between Sourcwell and CAI. New contractual requirements may become part of flow down terms to existing Members, and users of the program too, under the Participating Addendum. We will review the Marketing Plan, Attachment C – CAI Marketing Plan, to discuss the proposed outreach to new and existing Members, as well as adjust anything that may be required. The Marketing Plan plays a key role in long-term program success so that CAI may collaborate with Sourcwell to ensure it meets needs, targeted demographics, and is a valuable product. We will conclude the sessions with understanding Sourcwell's specific participation and activities to promote the program, who relevant contact points are, and what immediate and long-term goals the program has. The Contract Kickoff meeting will happen within 10 days of award. It will include key CAI personnel. We will provide an agenda. Following the meeting, CAI will provide minutes and document any key decisions made that may form part of the contract on agreement.</p> <p>The second task is developing and conducting Communications. As an incumbent we are ahead in this task. We have the relationships in place with existing program users and we will work with our current Participating Entities to be prepared to complete new contract tasks, extending the current period of performance, and managing extensions of contracted Resources so they can complete their tasks under the new program. With years of experience in transitioning programs from old contract terms to new terms, we understand the challenges and can manage any potential disruption with experience and a seamless changeover. We will update documentation and the websites referencing the new contract and new terms of engagement as appropriate and will communicate these changes to our current contract holders.</p> <p>A third, and no less important task, is the configuration of the VectorVMS® application. Revised documentation, background and screening tasks, changes to Compliance Manager needed at Member level, and a host of other actions will need to be performed based on the terms of the new contract. The VMS is a Software as a Service (SaaS) platform where changes can be rolled out seamlessly. The final task will be updating sales training for both CAI and Contractor sales staff. The program is well utilized internally, and our sales teams continue to create further opportunities. Our Contractors have also been successful in selling the program to their clients as another procurement option. Training will be provided to these sales teams for any new requirements based upon the agreed contract, as well as any changes within Sourcwell that can be a 'benefit' shared in the sales process.</p> <p>To summarize, key tasks include:</p> <ul style="list-style-type: none"> I Contract Kickoff Meeting with Sourcwell Finalize contract documents and terms Review Marketing Plan Discuss Sourcwell participation and activities I Communication to Existing Participating Entities and Contractors Alert Participating Entities and Contractors under our current Sourcwell contract to new award Discuss steps to move to new contract I Communication to Potential Participating Entities and Contractors Update websites and documentation referencing new contract Kick off marketing efforts announcing new contract I Configuration of VectorVMS® Tool Configure according to new contract requirements and rate card I Training Develop and conduct training on the new Sourcwell contract for CAI sales staff
11	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.	CAI has provided a copy of financial statements for 2019 and 2020, Attachment B – CAI Financial Statements.
12	What is your US market share for the solutions that you are proposing?	<p>CAI currently provides MSP services, as the prime contractor, to the following 10 states and entities. Based upon number of states, 50, CAI has 18% market share of potential state-level MSP business.</p> <ul style="list-style-type: none"> I Virginia Information Technology Agency I State of North Carolina I State of Georgia I State of Michigan I State of New Jersey I District of Columbia I State of Iowa (delivered under the Sourcwell contract) I State of Delaware I State of Arkansas I Sourcwell - nationwide
13	What is your Canadian market share for the solutions that you are proposing?	CAI has provided staffing services to Canadian entities; however, we do not provide a full MSP service to a Canadian entity at present. We have a Canadian contractor providing services to the State of New Hampshire through our current Sourcwell contract.
14	Has your business ever petitioned for bankruptcy protection? If so, explain in detail.	No.

<p>15</p>	<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. a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned? b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>CAI is best described as a service Contractor. The following describes our CAI Sales Staff, Contractor Network, and Account Management services and how they will perform on behalf of Sourcewell, ensuring the Members achieve their goals, and are driven by best practices for great results. With over \$16.3M in current staff augmentation and SOW sales supporting Members through the Sourcewell contract in addition to the \$69.1M in sales through the Iowa Sourcewell contract, CAI is confident we got our approach correct in the initial contract term and we look forward to building further upon that.</p> <p>CAI Sales Staff CAI is a leading provider of MSP services and IT staff augmentation services, as well as IT services, to nationwide public sector clients. CAI will be selling the IT MSP Contract to Sourcewell Members through its large nationwide network of sales staff and sales leaders, all of whom are full-time employees. CAI views all staff that form part of our leadership forum as 'sales', this expands our reach to market and ability to sell the Sourcewell contract; more than 150 advocates for the Sourcewell program promises strong growth. CAI has offices in offices in 11 cities and is registered to do business in 47 states. We have international offices in India and Philippines. Our corporate office is in Allentown, PA. Our full-time staff is based nationwide which allows us to have a good 'feel' for local market conditions when supporting our clients.</p> <p>Contractor Network CAI has developed a nationwide network of more than 2,400 Contractors through its term of service as an MSP. Each specific MSP program has its own Contractor pool made up of existing suppliers who bring the right capability and credentials to support the client. Contractors can be in multiple networks, creating growth and revenue opportunities for themselves. We particularly encourage small and disadvantaged businesses to take advantage of these opportunities. CAI has an established Contractor pool under the current Sourcewell program but will continually add to it through the enrollment process. CAI has processed more than 18,500 engagements across 528 state and local agencies through our MSP programs. This provides an indication of how successful we are in managing such a large supplier base. Qualified candidates are provided to Member organizations via this network of Contractors, who are governed by a Subcontractor Agreement (SA) that defines the relationship between CAI and how the Contractor is to support our customers. The SA includes specific service level agreements and performance metrics that will be tied to the specific Member agreement so that the Contractor understands what their expectations are in terms of performance, delivery, payment, and other contractual obligations.</p> <p>CAI Account Management The success of an IT MSP program starts with the Account Management Team. The mission of the CAI Account Management Team is to work alongside the Member, develop a trusted partnership, and be proactive in the management of the service. As full-time employees our Account Managers are dedicated to this service for Sourcewell and its Member community. The initial Account Management Team – which will manage and maintain each Member – is a highly experienced group of IT and staffing professionals. Our core team will be led by Linda Leiby, Vice President Contingent Workforce Solutions. In support of Ms. Leiby, will be Christopher Tilley, Director, Contingent Workforce Solutions, and Account Managers, Scott Edwards and Amy MacDonald. CAI has a large Account Management team and Operations Support team tied to our CWS practice. This provides the flexibility needed to support growth of the Sourcewell account. As more Members onboard under the program, CAI will assign either Mr. Edwards or Ms. MacDonald, or if needed an account manager from our larger team. Experience is the most critical element to ensure a team's success in managing an IT MSP program. Having Account Management Teams that possess IT experience based on industry best practices adds value at all phases of the process, from requirement qualification and candidate screening through on-boarding. CAI's Account Management Team is comprised of experienced IT professionals who possess excellent communication skills, an understanding of the broad range of IT roles and their requirements gained through in-field experience, and who are dedicated to alleviating the time-consuming task of hiring contingent IT Resources. They are involved in every part of our solution including: I Meeting with Member Program Managers to consult regarding needs and to assist with requirement preparation I Screening Resources and performing interviews I Working with Contractors to improve their ability to respond to requests I On-boarding Resources (resource support) I Closing out engagements I Resolving performance and supplier issues for the Member I Conducting review meetings for state purchasers I Holding Contractor meetings and calls to provide program information and review dashboards and metrics I Providing feedback and customer satisfaction</p>
<p>16</p>	<p>If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.</p>	<p>CAI is licensed to conduct business in 47 states within the United States. The IT staffing industry in general does not require industry specific certifications, licenses, or qualifications. However, when it comes to the placement of Resources with a Member, each resource will be fully qualified according to the job requirements. CAI will ensure that the resource will have the relevant certifications and approved training as identified in each individual requirement submitted via the VMS. CAI will work with each Member to identify the need for proof of certifications or skills and add these requirements to the VMS Compliance Manager. This will limit unqualified candidates, and through the provision of documented proof, the Member can be assured of a qualified resource.</p>
<p>17</p>	<p>Provide all "Suspension or Debarment" information that has applied to your organization during the past ten years.</p>	<p>CAI has not been suspended or disbarred during the last 10 years.</p>

Table 3: Industry Recognition & Marketplace Success

Line Item	Question	Response *
18	Describe any relevant industry awards or recognition that your company has received in the past five years	CAI has been fortunate enough to receive the following awards, recognition, and commendations over the last five years. 2021 "Top Workplace in the Lehigh Valley" by the Morning Call 2020 "Top Workplace in the Lehigh Valley" by the Morning Call Lutron - Help Desk Delivers During Pandemic Bristol Myers Squibb - A2W (Autism2Work) Team Exceeds Expectations Commendation 2019 Adam Heavner Memorial Award "Top Workplace in the Lehigh Valley" by the Morning Call Women in Technology Award Finalist Autumn Frantz CIO of the Year (Philia), Nominee Steve Heilenman A2W recognition by Highmark 2018 2018 Torch Award for Marketplace Ethics Florida Department of Transport - Prudential Productivity Award Florida Turnpike Enterprise - IBTTA's 2018 Tool Excellence Award for Operations Women in Technology Award to Cheryl Tichonevicz "Top Workplace in the Lehigh Valley" by the Morning Call 2017 2017 Torch Award for Marketplace Ethics PA Excellence in Technology Award "Top Workplace in the Lehigh Valley" by the Morning Call 2016 Elliot O. Grosvenor Food Safety Award NASCIO Nomination – Cross-Boundary Collaboration and Partnerships AFDO/AFA Award Nomination "Top Workplace in the Lehigh Valley" by the Morning Call 2015 NASCIO Longevity Award SmartCEO Executive Management Award, Steve Heilenman Best Growth Manager by Lehigh Valley Business, Andy McIntyre "Top Workplace in the Lehigh Valley" by the Morning Call
19	What percentage of your sales are to the governmental sector in the past three years	CAI's government sales average was 68% for the past three years.
20	What percentage of your sales are to the education sector in the past three years	CAI's MSP programs support the education sector. To date we have made 581 placements, totaling \$32.3M. This represents 1% of public sector MSP sales to Education.
21	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?	CAI has the following state and cooperative contracts. We have provided three years of sales as requested. District of Columbia: \$33,131,193.23 (2018), \$41,008,067.30 (2019), \$58,974,784.35 (2020) Sourcwell – US: \$1,069,964.65 (2018), \$3,595,440.30 (2019), \$6,062,018.61 (2020) State of Arkansas: \$12,408,413.06 (2018), \$9,495,045.77 (2019), \$7,969,797.04 (2020) State of Delaware: \$15,184,847.46, (2018), \$14,047,964.89 (2019), \$14,303,837.49 (2020) State of Georgia: \$-- (2018), \$9,164,298.99 (2019), \$91,016,399.00 (2020) State of Iowa (Sourcwell): \$11,694,143.81 (2018), \$28,020,953.54, (2019), \$29,358,203.90 (2020) State of Michigan: \$82,612,162.00 (2018), \$96,197,494.17 (2019), \$88,273,938.58 (2020) State of New Jersey: \$18,313,836.02 (2018), \$65,310,568.91 (2019), \$81,561,259.98 (2020) State of North Carolina: \$88,813,382.85 (2018), \$105,083,709.78 (2019), \$102,693,683.63 (2020) Virginia Information Technology Agency: \$85,541,341.63 (2018), \$104,288,931.38 (2019), \$120,599,829.85 (2020)
22	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	CAI does not hold a GSA contract or SOSA contract.

Table 4: References/Testimonials

Line Item 23. Supply reference information from three customers who are eligible to be Sourcwell participating entities.

Entity Name *	Contact Name *	Phone Number *
New Hampshire Department of Information Technology	Steven J. Kelleher, Director of Governance and Strategic Planning	(603) 223-5708 (o)
Orange County Fire Authority	Todd Muilenburg, IT Assistant Manager	(714) 573-6442 (o)
State of Iowa Executive Branch	Neil Shah, Chief Information Officer, Iowa Workforce Development	(515) 725-3884 (o)

Table 5: Top Five Government or Education Customers

Line Item 24. 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 *
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<p>Commonwealth of Virginia, Virginia Information Technology Agency (VITA)</p>	<p>Government</p>	<p>Virginia - VA</p>	<p>CAI provides the MSP solution and contractor management services to provide IT contingent labor to the Commonwealth of Virginia, VITA. CAI has supported the VAITCL contract for 15 years and through successful recompetes of the contract. We provide T&M staff augmentation services as well as Statement of Work (SOW) services via a network of 549 Contractors. Headcount as of July 1st, 2021, is 920 Resources, with a further 23 Resources engaged on fixed price projects. We currently work with 57 agencies across the Commonwealth, supporting those agencies with 50 discrete labor categories that are further broken into four skill levels. The rate card is also divided into two regions: Northern Virginia, which takes into consideration the market effects of the Capital area; and the remainder of the Commonwealth. The rates are 'not to exceed' rates.</p> <p>The program is driven by Service Level Agreements (SLAs) and Key Performance Indicators (KPIs) which include like requirements such as Resume Submittal Response Time, Round 1 Fill Rate, Attrition Rates, and Customer Satisfaction Surveys, along with Accurate Billing and System Availability. CAI has maintained SLA targets, often exceeding in many instances. These are measured on a quarterly basis. Customer satisfaction and subcontractor performance are also measured. We use automated processes driven by the VMS so that feedback can be provided independent of CAI, ensuring the integrity of the results.</p> <p>On June 28, 2021, CAI was awarded a new contract providing a continuation of services for a further five years, with an option of a further five years.</p> <p>Please note that the Commonwealth of Virginia has also readily agreed to act as a further reference. Please contact Sonia Hicks, VAITCL Category Manager, (804) 635-5138.</p>	<p>3,882 engagements</p>	<p>\$310.43M</p>
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State of North Carolina	Government	North Carolina - NC	<p>CAI holds the contract to provide all temporary IT staff augmentation Resources to the State of North Carolina via an MSP solution, which meets contractual SLAs, KPIs, and reporting targets; and provides continuous improvement and quality management at the core of its service. We work with a Contractor network, established rates, and use the VectorVMS® tool to supply qualified candidates to hiring managers on a timely basis. CAI supports 43 agencies across the state currently and has 790 Resources engaged. The network of Contractors is sizable, with 546 currently enrolled. Our performance is measured through a series of SLAs that target items such as approval time, resume submission to agency time, invoicing accuracy, payment accuracy, and VMS system availability. With CAI's program, the time it takes to fill each role has been reduced from two to three months to about six weeks (including PO creation and candidate notice to current employer), and the reporting capabilities have improved.</p> <p>CAI provides a team of four including two account managers; a program/contract lead; and an engagement manager who maintains the subcontractor network, PO process, and invoicing tasks via the VMS applications.</p> <p>The MSP requires CAI to provide agency consultation and job description creation, response management and performance oversight, candidate evaluation, interview facilitation, invoicing, and help desk support as needed. We are working with a large user community, a high volume of Contractors, and many agencies. The State struggled with capacity to manage the MSP itself, with shortfalls in Resources, extended time to hire, as well as no basic data collection to measure growth and success of its program. CAI provided this capability from Day 1, exceeding newly imposed metrics in the first year and retaining that performance level throughout. We have created processes, implemented the VectorVMS® platform, improved quality year on year, and established monthly and quarterly review meetings to ensure that program goals and customer satisfaction remain on target.</p>	3,771 engagements	\$296.59M
State of Michigan	Government	Michigan - MI	<p>CAI provided the MSP solution and contractor management services to provide IT contingent labor to the State of Michigan. We managed Contractors; provided reporting and account management; managed and maintained the VectorVMS® application; provided support and escalation; screened and interviewed; and ensured contractual compliance, SLAs, and KPIs were met. Our contract came to an end on June 30th, 2021, with a headcount of 532 Resources working across 44 State Agencies through a network of 602 Contractors.</p>	2,483 engagements	\$267.08M
State of New Jersey	Government	New Jersey - NJ	<p>CAI provides the MSP solution and contractor management services to provide IT contingent labor to the State of New Jersey. We have provided services to the State of New Jersey through various cooperative contracts since 2008 utilizing a network of 242 Contractors. We manage Contractors; provide reporting and account management; manage and maintain the VectorVMS® application; provide support and escalation; screen and interview; and ensure contractual compliance, SLAs, and KPIs are met. Headcount as of July 1st, 2021, is 629 Resources across 31 State agencies.</p>	2,354 engagements	\$165.18M

District of Columbia	Government	District of Columbia - DC	CAI provides the MSP solution and contractor management services to provide IT contingent labor to the District of Columbia. We manage Contractors; provide reporting and account management; manage and maintain the VectorVMS® application; provide support and escalation; screen and interview; and ensure contractual compliance, SLAs, and KPIs are met. Headcount as of July 1st, 2021, is 363 Resources across 21 District agencies through a network of 228 Contractors.	1,717 engagements	\$133.11M
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Table 6: Ability to Sell and Deliver Service

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

Line Item	Question	Response *
25	Sales force.	CAI is a leading provider of MSP services and IT staff augmentation services, as well as IT services, to nationwide public sector clients. Our experience providing these services places us in an extremely able position to support Members with a broader range of capability than a staffing or recruitment firm might be able to offer. CAI will be selling the Sourcwell IT MSP cooperative Contract to Sourcwell Members through its nationwide network of more than 200 sales staff and advocates nationwide, all of whom are full-time employees. CAI has offices in offices in 11 cities and is registered to do business in 47 states. CAI's structure is such that all leaders, sales staff, and client-facing delivery staff are considered 'sales' staff. As an example, CAI's delivery team – non-sales – supporting the Pennsylvania Turnpike Commission (PTC) has made sales through the Sourcwell program, having used the cooperative contract as a tool for PTC to procure staff that it would otherwise not have had access to. We have international offices in India and the Philippines. Our head office is in Allentown, PA, and we have offices in Wyomissing and Canonsburg, PA; Newark, DE; Richmond, VA; Tallahassee and Coconut Creek, FL; Chicago, IL; Des Moines, IA; Northville, MI; and Irvine, CA – a total of 11 US offices. A distinctly unique approach, CAI is also working with our Contractors to 'sell' the program to their existing clients. CAI has developed an approach to assist our Contractor network target their customers, explain the speed and benefits of the Sourcwell cooperative contract to the entity, and then help them better leverage their existing Sourcwell membership or become a Sourcwell Member to procure those professional services. With our network of more than 2,400 Contractors across the United States and Canada, our sales reach increased exponentially.
26	Dealer network or other distribution methods.	CAI understands the challenges of maintaining access to potential candidates. Access to quality talent is driven by many factors: supply and demand for IT talent, the capability of Contractors, competitive rate structures, and opportunities for Contractors so they invest in the program. CAI maintains a Contractor network for the Member community which provides Resources that have the skills needed to fulfill their staff augmentation needs. Our model increases reach to quality talent by partnering with a large and diverse set of staffing Contractors. Because many Participating Entities prefer local candidates, we ensure that our network includes who we know to be the quality local staffing (contractor) companies with knowledge of the local IT talent pool. We ensure our network is well balanced with Contractors representing the disadvantaged business communities to meet individual Member diversity commitment goals. With a practice-wide network of 2,400 Contractors that cover the United States and Canada, CAI is well positioned to continue the support and commitments made to Participating Entities already using the Sourcwell contract. Delivering across the country, as CAI is currently doing, takes more than just good management by the MSP. We must have the Resources to support geographically diverse Members. The graphic, located in Attachment E – Graphics Book; Figure 1 - Number of Available Contractors, identifies the locations and count of Contractors that can be activated in the Sourcwell network to provide Resources to the member community. Please note that all graphics are in a separate upload entitled Attachment E – Graphics Book.
27	Service force.	CAI's CWS practice is a mature organization with well established, proven processes and practices for managing IT contingent labor. Our large, dedicated team of 34 is comprised of seasoned professionals with substantial expertise in program management, IT staffing, and MSP operations. The team is spread across the United States, supporting the various contracts in our programs. Our leadership team has significant experience delivering CAI's MSP programs, with an average CAI tenure of more than seven years. Our contract management team provides the day-to-day support of the Members utilizing the contract – providing them guidance on submitting the requirement into the VMS, screening submitted candidates, and completing all steps to onboard the selected resource. We provide an experienced back-office team, which manages administrative functions such as subcontractor enrollment and compliance, timesheets and invoicing, and analytical support services. All steps in the process are facilitated through our VMS which provides the ability to provide detailed reporting across thousands of individual data points to ensure the program operates productively and efficiently for Sourcwell and its Members.

28	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>The MSP program deploys an integrated ecommerce model that provides easy access to contingent labor. A full diagram of the entire process appears in Attachment E – Graphics Book; Figure 2 – Integrated Workflow for Temporary Staffing. This narrative describes ordering steps in the process. CAI is responsible for the full cycle of obtaining staff, confirming their competencies, completing screening activity, and confirming all onboarding tasks are completed. We work with Contractors to make sure all requirements to the order have been met, and the start of the engagement is on time. We have provided an overview of the whole process in response to Question 68; however, this response aligns with the following steps: 1. Initiate Contact, 2. Create Requisition, 3. Obtain Approval. These steps assume the entity is already an active Sourcewell Member.</p> <p>1. Initiate Contact Member contacts CAI to confirm job classification, discuss requirements. The Member contacts CAI to discuss the upcoming requisition prior to submitting it, if desired. In some cases, this involves interactive discussion on the most appropriate job classification, especially when multiple classifications may be suitable for the work at hand. We can advise the Member on how to create a clear and complete job description and point to any relevant templates within the MSP management system. Our role is to ensure the ordering process has enough information to support the Contractors' search for candidates as well as expedite the process.</p> <p>2. Create Requisition Member creates requirement in VectorVMS®, blocks off time for interviewing. The Member is responsible for creating the requisition. The VMS guides them in creating the requisition with a sequential series of screens. The image at Attachment E – Graphics Book; Figure 3 – Create Requisition Workflow as viewed in VectorVMS appears across these screens so the user can easily see their progress in completing all required components of the requisition. Key information such as duration of the assignment, description of the day-to-day expectations, and required skills are detailed in the requisition in the VMS.3.</p> <p>3. Obtain Approval (Optional) An additional Member approver logs into VectorVMS® and approves the requisition, if required. Many Members require an additional approval for staffing requisitions. We will configure the VMS to support this, based on requirements, i.e., the process will differ based on the Member from one location or entity to another. In addition, Members will need to provide CAI with an approved funding source document such as a Purchase Order (PO). We recommend that Members obtain an approved PO prior to completing the requisition. From experience, we have learned that Members may be disappointed to interview a candidate, face a delay in obtaining PO approval, and subsequently find the candidate has taken another position elsewhere. Once the above ordering steps have been completed, we release the requirement to the Contractor network, who will respond with appropriate candidates in the time specified. The remainder of workflow is discussed in Question 68, where we discuss candidate submission, screening, and the other relevant tasks.</p>
29	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	<p>CAI identifies four key components that enable the Sourcewell Participating Entity to fully utilize the MSP to its utmost capability with high satisfying results. The key components are Account Management, Operations Support, Help Desk, and established Service Levels. These components form the basis of our customer service and support program. CAI's experience in contingent workforce management, our proven record of implementing and delivering successful MSP programs, our ability to adapt our programs to changes in the industry, and our commitment to industry best practices is unparalleled by other MSP Contractors.</p> <p>Account Management We have Account Management teams at region, state, and local Sourcewell Member levels – when designated – who provide the advice and guidance in using the MSP service, how to develop position requirements that are accurate and priced correctly, detail extra information so that our supplier pool can find the right candidates, and provide necessary screening and testing of Resources as the supplier pool presents them before being submitted to the Sourcewell Member. As well as these functions they are also the first point of contact for the Sourcewell Member. Each Sourcewell Member will have a dedicated Account Manager. They will also ensure any contractual SLAs and metrics are being met and identify resolutions if those service levels are falling short. The team will work alongside the client, develop a trusted partnership, and be proactive in the management of the service. In addition to the dedicated Account Management Teams, CAI also can leverage a team of seasoned Account Managers in Harrisburg, PA, as well as team members in other states. With this approach, we can manage and support your day-to-day business while having access to additional Resources during peak periods of activity.</p> <p>Operations Support From an operational standpoint, the contract is supported by the CWS Operations team made up of three distinct teams: Analytics, Engagement, and Vendor Management. I The Vendor Management team subprocesses enrollments and verifies compliance of Contractors enrolled in the program, responds to subcontractor questions/requests, and confirms audit and maintenance of Contractor compliance items. The team serves as a contact point for these firms throughout the contract lifecycle. I The Engagement team supports the Contract and Account Managers by supporting the tasks associated with the overall contract workflow. The team creates and manages all data within the VMS, ensures weekly timecards are complete and accurate, monitors spend against Purchase Orders, and responds to customer requests. The team also manages a contract-specific help desk for contract users which is detailed below. I The Analytics team provides both required contract reports and ad-hoc customized analytics solutions to users of the contract. The team is responsible for VMS configuration and reporting, monitors ERI wage data and rate cards, performs account receivable tracking, and responds to subcontractor requests for immigration requests for evidence (RFE). The team is comprised of report-writing experts, skilled at using data points from within the VMS to create detailed metrics.</p> <p>Help Desk Our Help Desk offers Sourcewell Participating Entities and suppliers technical help and support in using the VMS tool. CAI's Operations team provides Level 1 support for Help Desk calls, logging and tracking issues, and questions from the Sourcewell Participating Entities and supplier users. The team is highly skilled, having provided support across our entire MSP contracts for many years. They have extensive knowledge of the procedures related to these types of contracts, so their responsiveness is quick and accurate, and based upon lessons learned.</p>

They can answer general questions on how to utilize the contract but escalate to the local Account Managers, as necessary. The team also has deep experience with the VectorVMS® tool and can answer "how to" questions related to the use of the tool from the agency, supplier, and candidate perspectives. They can provide ad hoc training over the phone when needed, i.e., talking to the user and walking them through a process. Requests are tracked on our Help Desk ticketing system and include the following:

- | Reporting requests
- | Password resets
- | User profile additions/changes
- | VectorVMS® mentoring/training
- | VectorVMS® functionality issue resolution
- | Invoicing inquiries

Service Levels

Each Sourcewell Participating Entity, through its Participating Addendum of the Sourcewell cooperative contract, can work with CAI to create SLAs based upon their unique business needs. The reason we do this is to ensure that the service level reflects the size and scope of each Sourcewell Participating Entity, and their anticipated usage. The SLAs are reviewed quarterly, and changes can be made to type, scope, and frequency if the SLA or metric does not present the right information that the Sourcewell Participating Entity needs. In some instances, the Sourcewell Participating Entity may wish to adopt the default Sourcewell contract SLA, rather than negotiate their own SLAs and performance metrics. This is ideal for those Entities who may engage only one or two Resources as opposed to a large volume Participating Entity. CAI and Sourcewell will develop a default SLA that can be used in those instances.

CAI has significant experience creating and delivering against SLAs and will provide input and feedback during the kickoff meeting so that the Sourcewell Participating Entity can make an informed decision.

Response Time Capabilities and Commitments

CAI's average time to fill a requirement, from receipt of requirement through to Day 1 is 3.5 weeks. This is from receipt of requisition through to the resource reporting for work on the first day of employment. This includes all interviews, screening and background checks, system administration, and any contractual information to be completed by all parties, as appropriate.

Although there are similarities across service provisions, each of our current MSPs for state government have specific requirements to be met and each program is a tailored solution. As such, CAI will work with and customize the SLA to meet the needs of the Sourcewell Participating Entity. This will be agreed upon and documented as part of the SLA.

CAI provides its customers with average time to fill reports on a quarterly basis as required by their contracts. Any placements that exceed the average are reviewed both internally and with clients to determine the factors behind the delayed placement. Recommendations and changes to process are considered if this is the reason for significant delay. If the anomalies are outliers, we look to understand the causes to prepare for similar eventualities. Outliers are most associated with technology skills or security requirements – technology as in the requirement is bleeding-edge, or conversely for a product that is extremely dated and so the skill set is hard to locate; and security requirements, particularly in the Federal arena, have major impacts to timeliness when working with secure agencies or secure environments.

Contractor Incentives

CAI is committed to the success of our Contractor network. Our first and most consistent driver is to make sure that we provide the support and Resources needed to each Contractor so that they can succeed. A program with limited support and high rates of attrition does not encourage participation from the Contractor community, so CAI's goal is to establish clear engagement parameters for joining the network and then work closely with each Contractor and monitor their performance to help them succeed.

We meet regularly with Contractors to provide insight to in-demand skills used by the Sourcewell Participating Entity and to provide best practices for recruiting and presenting candidates. Our Vendor Management team provides quarterly web training on how to use the VectorVMS® tool for newly enrolled Contractors or those that want a refresh. We send weekly updates to all Contractors regarding the status of open requisitions, upcoming needs, and helpful tips for success; and our Account Managers dedicate time to mentoring Contractors to aid their success in the program. This level of additional support is not provided by every MSP Contractor. CAI's mentoring and support remains a tangible value add in each of our programs.

Some Members may have disadvantaged business commitments. Those Contractors who qualify with those designations are placed in a Tier which gives them advanced notice of requirements. This allows them extra time to identify and secure candidates before those companies with larger recruiting capabilities.

CAI encourages our successful Contractors to join the networks of our other programs. This opens them up to new revenue opportunities.

CAI also provides mentoring and support to the Contractor. This is an important task. Spending the time helping a Contractor through the process encourages them to participate in the program. It therefore creates a reliable workstream for those that are successful. These are the companies we want to work with in our network as they understand the value they bring to the Member, which in turn provides the security for the individual contingent worker. This cannot be overlooked and has been a significant part of CAI's success to date with the current program.

As a large organization with more than 70% of our business supporting the public sector, the benefits to participating in CAI's Sourcewell program – on award – are significant for the growth and development of small-, minority-, woman-, veteran-, and disabled veteran-, owned businesses, as well as other socio-economically disadvantaged businesses. CAI operates 10 MSP programs and cooperatives across the country. Each program requires a network of providers that can offer a broad range of services to support the end client. The programs are subject to enrollment for staff augmentation providers and a more limited enrollment approach for SOW requirements. CAI will make these programs available to current Contractors in our Sourcewell network based upon meeting each program's enrollment criteria. This is a significant opportunity for businesses to develop and grow. They understand our MSP programs and can be effective immediately. This reinforces a strong retention for Contractors within the Sourcewell network.

The other areas that will benefit Contractors is our modelled approach to developing the capabilities of our partner providers. The CAI Account Management team provides ongoing oversight and mentoring to our Contractors to make sure we are meeting the business needs of Members. We meet regularly with Contractors to provide insight to in-demand skills used by Members and to provide best practices for recruiting and presenting candidates. Our Vendor Management team provides quarterly web training on how to use the VectorVMS® tool for newly enrolled Contractors or those that want a refresh. We

		send weekly updates to all Contractors regarding the status of open requisitions, upcoming needs, and helpful tips for success; and our Account Managers dedicate time to mentoring Contractors to aid their success in the program. This level of additional support is not provided by every MSP provider. CAI's mentoring and support remains a tangible value add in each of our programs.	
30	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in the United States.	CAI will fully support all geographic areas of the United States, including Hawaii and Alaska. We have a nationwide presence as a company, and with a supplier base of more than 2,400 registered suppliers available to us at this time, we are fully confident we can meet requirements across Participating Entity sectors as well as across the United States.	*
31	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	CAI is willing to provide its services to Canada. As a multi-national organization, we have provided services globally. We have a Contractor located in Canada who provides services under our current contract and will also support requirements originating in Canada as they arise. We will build upon our contractor network, adding new Contractors across the provinces that will provide full coverage. CAI has a Canadian rate card in place for those Canadian Participating Entities that on-board to the Sourcewell MSP.	*
32	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed contract.	CAI will fully support all geographic areas of the United States and Canada.	*
33	Identify any Sourcewell participating entity sectors (i.e., government, education, not-for-profit) that you will NOT be fully serving through the proposed contract. Explain in detail. For example, does your company have only a regional presence, or do other cooperative purchasing contracts limit your ability to promote another contract?	CAI will fully support all Sourcewell Participating Entity sectors including government, education, and not-for-profit. We have a nationwide presence as a company, and with a supplier base of more than 2,400 registered suppliers available to us at this time, we are fully confident we can meet requirements across Participating Entity sectors as well as locations.	*
34	Define any specific contract requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	We do not have any current competing cooperative contracts that restrict CAI in promoting the Sourcewell Contract should we be awarded a contract.	*

Table 7: Marketing Plan

Line Item	Question	Response *
35	Describe your marketing strategy for promoting this contract opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>CAI has significant experience developing successful IT MSP contracts nationwide. We understand how to drive business to the IT MSP because we clearly present the features, benefits, and value of an MSP program in a way that resonates with the Sourcewell Member.</p> <p>CAI understands that Sourcewell works closely with its vendors to promote and educate both the vendor and the Sourcewell Member on the benefits and use of the contract. We understand that Sourcewell advertises awarded contracts in select specific publications; includes the award in the Contract Directory so Sourcewell Members know who we are and how to contact us; attends exhibitions with the awarded vendor; maintains a web presence; and conducts other strategic activities.</p> <p>CAI's marketing strategy will be to continue to collaborate with specific activities and execute further complimentary tasks that reach the Sourcewell Member verticals with a tailored approach that gains interest and a new active IT MSP user. This approach has been contributed to our successes to date. Such verticals will include state and local government, education, and non-profit entities, among others. As new verticals arise during the contract, CAI will develop new strategies to reach those markets. Our discovery process will identify marketing tactics in addition to those discussed below, as well as identify ways to improve and quantify the success of the marketing strategy.</p> <p>To ensure success, CAI will continue to educate our sales representatives so that they fully understand and promote the cooperative way of selling, and the value that brings to the Member and procurement process. A cooperative approach benefits each Member through increased purchasing power; CAI's goal will be to increase the number of Members in the IT MSP. This will be measured and reported during the lifecycle of the contract, so that Sourcewell can see an upward growth curve.</p> <p>As mentioned previously, CAI has also developed a sales approach that utilizes our Contractor network to 'sell' the program to their existing clients, as well as target new customers, explain the speed and benefits of the Sourcewell cooperative contract to the entity, and then help them better leverage their existing Sourcewell membership or become a Sourcewell Member to procure those professional services.</p> <p>CAI has deep experience working with ceiling-based pricing. We will continue to work with Sourcewell Members to provide pricing that is within their reach, adjusting accordingly to the environment. Our pricing model is tiered, targeting specific rates to the location and economic client of the Member. This offers a broad solution to onboarding new Members and getting them active within the IT MSP contract. We can further tailor pricing at the individual level when needed.</p> <p>In conjunction with this flexibility, CAI is also able to tailor terms and conditions per the individual Member via a specific Participating Addendum. This allows us to work with specific service levels or performance metrics, local or state law, or national laws that benefit the Member and the way they are governed.</p> <p>Part of CAI's marketing strategy will be to develop existing Sourcewell Members into users of the IT MSP contract. A strong marketing approach will promote the benefits and advantages to cooperative purchasing so that the rewards are clear to Sourcewell. We will target existing Sourcewell Members, and prospect entities that are not current Sourcewell Members. Our marketing will present the benefits of Sourcewell Membership as well as the use of the Sourcewell IT MSP contract to bring them onboard. CAI and its partners have established clients and potential clients that would be part of our initial market targeting. This will also include targeting new verticals to expand the collective reach of the IT MSP contract as much as possible.</p> <p>CAI has a distinct advantage as a current Sourcewell IT MSP provider. We continually develop, learn, and understand new market and technology trends through our existing customers and marketing efforts. This allows CAI to recognize a trend or change in the IT industry that will impact existing or future customers and gives us the ability to prepare for future needs prior to the customer addressing their own requirements and processes. These traits make CAI an invaluable partner – using our experience and capability to guide a customer's navigation of the IT industry as a time and cost saving exercise.</p>

<p>36</p>	<p>Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.</p>	<p>CAI will use its advanced contact management tools to target new Members; keep current Members informed; and promote the contract and to update Members on important information, opportunities, and offers related to the program, e.g., training opportunities, management tools, etc. These tools are discussed below.</p> <p>Technology The Marketing Manager has eMarketing tools such as ActOn, Lucid Press, 6Sense, and Oktopost to manage large scale email and social media contact with Members. They can track leads in our Salesforce instance. With the aid of CAI's extensive technical staff, the marketing manager also has the tools to set up and maintain a website dedicated to servicing Sourcewell Members. CAI will regularly promote the advantages of working with us to encourage participation and reduce concerns that would limit participation.</p> <p>Social Media CAI targets a variety of social media platforms when developing its social media strategy. We have an established presence on most and are looking to develop Google+ as another option. Facebook provides a casual but broad-reaching environment. We developed a business page that will concentrate on the visual aspect, inviting viewers to interact and 'follow' the page. It will include industry related articles, images, videos, and other items that promote the use of the IT MSP. The tone is light with Facebook, encouraging feedback and conversation so that we can understand the audience better.</p> <p>https://www.facebook.com/ComputerAidInc/</p> <p>Google+ is a Facebook competitor, and will be a new development task for CAI initially. As per Facebook, it promotes the same fun, casual atmosphere. On Google+ we can upload and share photos, videos, links, and view '+1s' which broadens the reach. We can take advantage of Google+ circles, which allows us to segment followers into smaller groups, enabling you to share information with some followers while barring others.</p> <p>Twitter is the social media marketing tool that allows CAI to broadcast updates across the web. We will follow tweeters within the Sourcewell Member community, industry, or related fields, and gain a steady stream of followers in return. We will offer a mix of official-related tweets about specials, discounts, and news updates with some fun and quirky tweets, facts, and other items to appeal to the Sourcewell Member community. An effective way to gain a good following is to re-tweet when a Sourcewell Member has something good to say about the IT MSP; this builds confidence in the user community. Using Twitter as a social media marketing tool revolves around dialog and communication, so we will interact as much as possible.</p> <p>https://twitter.com/computeraidinc</p> <p>LinkedIn is one of the more professional social media marketing sites. LinkedIn Groups is a great venue for entering into a professional dialog with people in similar industries; it provides a place to share content with like-minded individuals. We will encourage customers to recommend the IT MSP as a developed LinkedIn profile. Recommendations make the IT MSP appear more credible and reliable for new customers.</p> <p>https://www.linkedin.com/company/computer-aid-inc</p> <p>CAI hosts a YouTube channel to disseminate information about several of our services including our Learning Academy, CAI Cares, and Autism2Work. We also post information concerning awards and interviews with our staff who have performed well with clients and delivered outstanding contributions in the workspace.</p> <p>https://www.youtube.com/user/ComputerAidInc/videos</p>
<p>37</p>	<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>Sourcewell and CAI will act in partnership to promote the IT MSP Contract to its Participating Entities. With access to more than 80,000 perspective entities and having done business with 50,000 registered entities throughout 2021, Sourcewell can help CAI get in front of its customer base to promote the new IT MSP Contract as the right choice for IT services and staff augmentation over and above their existing avenues of procurement. We would look for Sourcewell – through its typical communications such as social media, exhibitions, and other outreach activities – to promote the benefits of the Contract and socialize the CAI name as the prime vendor and point of contact. As a partnership, promotional activity must be two-way to be successful: Sourcewell can provide contact opportunities and CAI can drive revenue to the IT MSP where Sourcewell will gain revenue in return.</p> <p>CAI will work with Sourcewell to develop new marketing collateral and presentations so that in the first instance Sourcewell has the right material at hand to present the features and benefits to the 'IT procurement' organization or individual when an opportunity arises. CAI will use the existing Sourcewell Participating Entity base to reaffirm its contact list to create the opportunity to present the full capability of the IT MSP. By enrolling new entities, it provides CAI with the opportunity to grow the IT MSP Contract and therefore continually build on the premise of collective purchasing and the rewards that offers to Participating Entities. Secondly, the award needs to be socialized throughout CAI's Sales and Marketing Teams, account management, and contingent labor directors. As part of our internal process, on award, CAI will provide training and education for our personnel. The training will reach all our Sales, Marketing, and Account Teams and offices nationwide. This will create the maximum opportunity for CAI personnel to promote the new IT MSP Contract to our clients and potential new clients. We will provide our personnel detailed information on the specific services we are offering under the IT MSP, how each Sourcewell Member operates once on-boarded to the IT MSP, and what the fees and service levels are. Because we have an established contract with Sourcewell, and Members are familiar with the availability of the program, the new contract will be seamless to our Sales and Account Management Teams. It will be easy for them to continue to manage, promote, and sell. This ensures Sourcewell gets the most benefit quickly and efficiently; we have little to no ramp up and our staff understand the MSP concept and how best to present it.</p>

38	<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>Yes. CAI proposes the continued use of the VectorVMS® e-procurement application, a tried and understood technology that both Sourcewell and its Members are familiar with. It has been utilized in 19 separate MSP solutions and is the platform used by 528 discrete agencies and entities nationwide. This includes state and local government as well as education and higher learning entities, and non-profits. It is a verified e-commerce system that facilitates instant communication between stakeholders and serves as a common repository for information related to engagements created through the MSP program. Unlike competitors in this space, the VectorVMS® application is Section 508 compliant to WCAG 2.0 AA standards. Sourcewell and its Members will have access to multiple dashboards, allowing managers to easily see performance metrics, status of specific requisitions, and timesheet information for assigned temporary staff. Workflow is provided to allow the Member to approve resource hours, reimbursable expenses, and deliverables (if applicable) prior to invoice submission. The VMS is a robust system which automates the resource and project engagement process for each Member. A full list of features is illustrated in the diagram at Attachment E – Graphics Book; Figure 3 – Vector VMS, a Powerful e-Procurement Tool.</p> <p>Online Processes The core VMS component triggers electronic notifications to impacted stakeholders based on business rules. For example, when a Member releases a staffing request through our electronic requisition process, the VMS notifies multiple CAI representatives, and can be configured to also alert other Member, stakeholder, or entity staff. CAI will review/confirm the request and release it to the pool(s) of providers, based on the job position and location. This instantly notifies registered providers of the opportunity.</p> <p>Resume Review As providers respond with resumes and professional/biographic data on their available staff, the VMS notifies the CAI managers. Notifications occur in the form of email which stakeholders can view from their PC or mobile device, via a specific mobile application available for iOS and Android. Members can also log directly into the VMS at any time to see the status of staffing requests, availability of candidates, interviews scheduled, and performance reports, etc. The VMS provides transparency into the entire procurement process.</p> <p>SOW Proposal Review and Ranking Our VMS system can provide Members with ranking abilities when Contractors submit proposals for project work. The Member manager may review and score each proposal within the system as defined during initial configuration of the VMS application.</p> <p>Invoice Submission and Tracking Time is recorded in the VMS and approved by the Member Hiring Manager. If additional oversight is required on time approval, the VMS can accommodate the task and route as appropriate, capturing the additional approval. Invoicing is generated from completion of time approval steps, and we use the VMS and approval tasks as the baseline for any discrepancies or issues.</p> <p>Reporting We can provide summary reporting on an agreed upon basis. An example of report content may include summary of sales for the last period, subtotaled by agency with current hours and bill rates; a utilization report; and an SLA achievement report. These reports, based on existing client data, clearly show the reporting capabilities that CAI and the VectorVMS® can offer. We will produce accurate and substantive information that describes the value of the Sourcewell program and includes active network Contractors, pending network Contractors, inactive network Contractors, business trends, MWBE and set aside and participation, contract utilization by Member and job category, and market rates and contract hourly reviews. We can also review SLA performance – where we have exceeded expectations and how we might improve indicators should trends be identified. Reporting may be specific to the Member requirements and delivered as and when needed according to the participating addendum.</p> <p>Purchase Order/Resource/Project Tracking CAI measures Contractor performance on a T&M SOW through a series of reports via the VMS Business Intelligence Platform. The specific reporting will depend on how the Member defines business rules for using SOWs. If milestones or deliverables need to be formally tracked, CAI would use our existing milestone tracking report; this report indicates whether milestones are being delivered and approved per the contractual schedule defined in the SOW. We can also develop reports to track T&M hours against specific milestones or not-to-exceed hours as defined in the SOW. Should a SOW include a cap on T&M hours, we track hours against this cap just as we would with a staff augmentation engagement, where we monitor hours against a not-to-exceed price in a Purchase Order.</p> <p>Customer Satisfaction Surveys We conduct both internal and external quality reviews of our business processes which will be evident in Customer Satisfaction surveys and quarterly business reviews.</p> <p>Single Sign On The solution supports SAML 2.0 token authentication for SSO. If clients are not using Single Sign On, they will be authenticated into the platform with a username/password/org key.</p> <p>Backoffice Integration The VectorVMS® has interfaced with all major ERP systems as well as accounting systems and various project management tools. Some of the more common include SAP, PeopleSoft, Clarity, Ariba, Oracle, Kronos, and Lawson. The VMS has a built-in integration engine which supports XML, HRXML, flat files, FTP, and https for seamless data exchange with other enterprise applications.</p> <p>Technical and Functional Assistance The Member will be provided with a team who will administer and configure the VMS. This team will manage access to the VMS instance through user profile creation and maintenance. Each user has his/her own user profile within the VMS. The user profile is the basis for the VMS authorities granted to each individual user. An unlimited number of user roles can be created within the VMS which are then used for approval workflows, data access, and reporting capabilities. Demographic information such as email address, role description, and phone numbers are also stored in the user profile.</p>
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Table 8: Value-Added Attributes

Line Item	Question	Response *
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<p>39</p>	<p>Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.</p>	<p>Having delivered multiple MSP programs over the years, each of which have required their own unique deployment and training plans, CAI has a tested methodology for ensuring that training is relevant, current, and ongoing throughout a program's lifecycle.</p> <p>CAI will conduct introductory sessions for each new Participating Entity that presents an overview of the contract, introduces CAI, describes the managed staffing services process, and stresses the benefits of this new contract. The presentation can be fine-tuned, depending upon the audience, to stress higher-level aspects or 'how-to' details.</p> <p>The training for program Participating Entities focuses on key topics. Our approach to presenting these topics is tailored to requirements and availability of Participating Entity staff. We can present topics sequentially in one session covering the entire workflow, or as individual sessions for users who want to focus on a particular point in the workflow or who may have time restrictions and are unable to sit through several hours of training at one time. CAI has experience with Microsoft Teams and uses this software as our primary internal communications tool. Several methods of training delivery are offered:</p> <ul style="list-style-type: none"> I Training with real-time webinars using Microsoft Teams I In person, hands-on training of individuals or groups – scheduled as needed, and within COVID-19 guidelines that are applicable at the time of training sessions I 24x7 access to training materials, which includes online training guides and recorded training videos <p>CAI will offer real-time training webinars to the client user community focusing on the key topics shown below.</p> <p>Training Plan for Participating Entities</p> <ul style="list-style-type: none"> I VectorVMS® Navigation – Users are trained on how to navigate through the pages in VectorVMS®. I Creating a Requirement – Users who submit requisitions are trained on the process of creating a requirement within VectorVMS®. I Approving a Requirement – Approvers who have approval/rejection authority of submitted requirements are trained on the process of reviewing and approving/ rejecting a requirement within VectorVMS®. I Selecting Candidates – Users are trained on the processes CAI Account Managers follow to select the candidates forwarded on for consideration, as well as the processes they follow to review and select a candidate for engagements within VectorVMS®. I Approving Expenses – Users who authorize expense reimbursements on their requisitions are trained on the process of reviewing/approving/rejecting expenses within VectorVMS®. I Approving Timesheets – Time approvers are trained on the process of reviewing/ approving/rejecting timesheets within VectorVMS®. I Evaluating a Candidate – Users with engaged Resources are trained on the process of evaluating the engaged candidate within VectorVMS®. I Reporting – Users can learn how to run and/or create their own reports within VectorVMS®. <p>As we complete the initial training tasks, the program will be augmented by a User Guide to assist the individual as they work with the VMS as well as the broader program in general. It will describe how they engage Resources, how to create a requisition, user roles, approving time, creating an interview request, and other key tasks. A sample User Guide has been included within Attachment D – Standard Transaction Document Samples.</p> <p>Training Plan for Contractors</p> <p>Training for Contractors will follow a similar plan:</p> <ul style="list-style-type: none"> I VectorVMS® Navigation – Users are trained on how to navigate through the pages in VectorVMS®. I Reviewing a Requisition – Contractors are trained on the information provided by Users on a requisition and the key data points within VectorVMS®. I Submitting a Candidate – Contractors are trained on the process of submitting candidates in VectorVMS®. I Submitting Timesheets – Contractors and engaged candidates are trained on the process of submitting timesheets within VectorVMS®. I Submitting Expenses – Contractors and engaged candidates are trained on the process of submitting expenses within VectorVMS®. <p>To accommodate the schedules of Contractors, different methods of training delivery are offered:</p> <ul style="list-style-type: none"> I Training with real-time webinars using Microsoft Teams I Online training guides available to the providers stored in VectorVMS® <p>CAI's goal is to provide training so that all users within the program are fully cognizant of the features and capabilities of the VectorVMS® system and the MSP program itself so that they can take full advantage of available functionality.</p> <p>Training will be available throughout the life of the program, including both self-driven training through the recorded videos Participating Entity and Contractors User Guides, as well as regularly scheduled real-time training webinars. Training materials will be refreshed whenever changes are implemented in the program. CAI's Contract Management team is also available to provide one-on-one training to new users or anyone who needs additional guidance on the features of the program.</p>
<p>40</p>	<p>Describe any technological advances that your proposed products or services offer.</p>	<p>VectorVMS® has been our vendor management system (VMS) of choice since 2004 and allows us to manage both Time and Materials (T&M) staff augmentation and SOW requirements through the contingent lifecycle. CAI has successfully implemented this application for 19 MSP programs across state, local, and education entities, including the current Sourcewell contract where it has received positive support from the Participating Entities. The tool provides CAI and Sourcewell Members the ability to manage the full contingent labor life cycle within the application. Using detailed program metrics provides essential reporting so Members can track performance across the range of services they are using. The hiring process is also streamlined, reducing the burden on the Member, who is assisted by the CAI team to make requirement fulfillment faster and easier. Use of the tool controls costs, manages compliance, increases quality, and boosts efficiency across the contingent labor lifecycle.</p> <p>CAI is a long-time member of VectorVMS®'s Client Advisory Board (CAB). Our participation in the CAB provides us with the needed access to request changes to address customer issues and to drive the development of new features and future enhancements. Two of the technological advances CAI helped to get implemented were (1) 508 Compliance and (2) a VMS mobile app.</p> <p>VectorVMS® Mobile App</p> <p>With a fully Section 508 compliant application, VectorVMS® has taken the next step and developed a mobile application that works with most smart devices such as iOS and Android. The mobile app can provide alerts for tasks to be completed in the full application or be used to complete such tasks as timesheet approvals, expenses, requisition approvals, and engagement approvals. An example image of Timesheet Approvals appears in Attachment E – Graphics Book; Figure 4 – Timesheet Approval in the Mobile App.</p> <p>508 Compliance has been a challenge for many organizations. However, CAI and VectorVMS® collaborated early in the process to ensure that latest releases of their application would meet and exceed the minimum standards. The VectorVMS® platform has achieved WCAG 2.0 compliance, a critical step forward when meeting state, local, and education guidelines for accessibility requirements.</p>

41	Describe any "green" initiatives that relate to your company or to your products or services, and include a list of the certifying agency for each.	<p>CAI is committed to demonstrating good stewardship regarding our environment. We recognize the impact our organization and our associates can have on the environment due to our diverse locations, our resource consumption, and our interactions worldwide with individuals, businesses, and other government agencies.</p> <p>As an organization, CAI is committed to:</p> <ul style="list-style-type: none"> complying with all applicable local, state, national, and international polices as they relate to environmental management and our business practices integrating environmental management principles into our business plans and activities minimizing the impacts of our activities on the environment as much as possible raising awareness of, and commitment to environmental management among our associates through recycling programs, community activities, and corporate policies reduced paper usage – VectorVMS® and our IT staff augmentation solution reduce paper usage to almost zero, preferring to invoice, track, audit, and exchange data and information electronically <p>VectorVMS® and its parent company, LTG plc, operate environmental best practices to reduce negative impact to the environment, as well as ensure sustainability, be ethically responsible, and meet labor and human rights laws. As a company they are Ecovadis certified.</p>
42	Identify any third-party issued eco-labels, ratings or certifications that your company has received for the equipment or products included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	CAI is not proposing any equipment or products that require eco-labels, ratings, or certifications.
43	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>We understand the significance and value of WMBE, SBE, and veteran-owned businesses as part of a government entity's approach to equal opportunities. CAI's current Contractor network, and that of our network under the proposed new program, will be heavily augmented by such businesses. CAI has disadvantaged business commitments in many of its programs, such as the District of Columbia which requires a 95% locally certified business target for example.</p> <p>CAI's nationwide Contractor pool has over 16% of businesses who certify themselves as a small-, woman-, minority-, veteran-, disadvantaged, or other, business. This number increases as we build new Contractor pools to support new and existing programs.</p>

<p>44</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>CAI's success in the MSP space has been based on a superior combination of value and quality of services. Our long-term strategy within the MSP market remains consistent; we will seek partnerships with clients that place an emphasis on best value and quality service, using highly developed tools, heavy client interaction and participation, and an ongoing commitment to continuous improvement. The CWS practice will stay abreast of contingent workforce trends and innovations through insight provided via our memberships with Staffing Industry Analysts (SIA) and Gartner. We will help drive improvements and enhancements with the tool through our seat on their Client Advisory Board (CAB).</p> <p>Our long-term, strategic plan for our MSP offering has been shaped by our experiences over the last 17 years, as well as our analysis of trends within the MSP market. CAI's MSP practice has and will continue to investigate and implement process changes and take advantage of technologies deemed to be beneficial to our overall service. Three key components of our MSP program's future vision and strategic plan are:</p> <ul style="list-style-type: none"> I Increased automation, by researching and integrating ServiceNow, Robotic Process Automation (RPA), and Artificial Intelligence (AI) into our MSP model I Leveraging the talent ecosystem, by offering employer-of-record/payrolling services and investigating direct sourcing options I VMS enhancements, by reviewing both existing and new functionality against the needs of CoVA to support a streamlined and efficient workflow <p>Increased Automation</p> <p>CAI is heavily invested in ServiceNow and has a proven ServiceNow practice. ServiceNow provides 'platform as a service' solutions that, among other things, improve service management and enhance workflows for organizations. With our knowledge and experience in creating ServiceNow solutions nationwide, we have developed and implemented a new Supplier Management Portal for our MSP programs. The new Portal provides our Contractors with a self-service platform that streamlines the program enrollment workflow, enhances interactions with the CAI Vendor Management team, and allows our Contractors to be active participants in maintaining their contractual documentation.</p> <p>The following primary features were part of the first release of the Portal in Q4 of 2020:</p> <ul style="list-style-type: none"> I Ability for Contractors to enroll in any MSP program with minimal support from CAI staff I Ability for Contractors to submit required items for program enrollment, and manage these items directly within the portal I Workflows that enable CAI staff to track requests, provide feedback to Contractors, and approve/reject enrollment documents I Ability for Contractors to self-manage their internal users within the application I Automatic notifications to Contractors about expiring documentation I Automation to store documentation in SharePoint Online as well as retrieve documents without CAI staff involvement I Visibility and reporting capability on the status of every Contractor and program enrollment <p>RPA is an emerging form of business process automation based on the notion of software robots or other forms of AI. CAI currently uses AI in our District of Columbia MSP to automate the submission of invoices directly into DC's systems. We also use AI to automate our back-office process of auditing the data stored in the VMS and our financial system, Workday. Robotics are used to validate the rates on both agency and supplier invoices, reducing the potential for human error. These RPAs have improved accuracy and speed for our programs, and we continue to evaluate our internal back-office processes, on an ongoing basis, to determine additional candidates for automation.</p> <p>Speed to Market</p> <p>A key focus for CAI and the success of its existing Sourcewell program is the speed with which we can implement the solution for a Participating Entity. Speed to market is key. The IT candidate market is now driven by the candidates; demand is high. CAI's solution sees a new Participating Entity able to use the solution the same day the participating addendum is signed. Once approved, the application is available and ready to be used via any browser. The requirements, rate cards, and other items are built into the system and ready to go. Specific information for the entity may be required to be amended or created, but the solution is available for the entity to use, and fully supported by CAI staff as they get to know the program.</p> <p>Employer of Record/Payrolling</p> <p>To balance the dynamic shift in workforce engagement and the ever-changing needs of our clients, CAI can serve as a worker's Employer of Record (EOR), placing us in a position of being legally responsible for paying an employee who is performing work for a Participating Entity assuming conditions are right to do so. More than just 'payrolling', an Employer of Record has the responsibility to manage taxes, benefits, insurance; and perform onboarding and compliance activities, and other administrative tasks. CAI offers EOR services for candidates referred from a Member, for candidates with previous service returning to a Participating Entity, or for Participating Entity employees converting to 1099 status.</p> <p>VMS Enhancements</p> <p>A VMS solution needs to have processes that are intuitive and easy for new users to adopt, and (like an MSP) needs to constantly evaluate the market and implement new functionality/enhancements to benefit its customers. CAI recognizes that we need to continually examine both the new features being offered as well as existing application functionality that may not be currently utilized and evaluate their value to the Participating Entity. Enhancing user reporting, rolling out the mobile application, implementing new functions within the application, and refreshing our documentation will be a large focus for implementation of the new program.</p> <p>Enhanced Reporting</p> <p>Working with each Participating Entity, CAI will make self-service reporting a focus under the new program. We will give access to the reporting library available in Vector's Business Intelligence to those users who would like the ability to run their reports. We will give report creation authority and training to those users who would like to build their reports. This new access will supplement the data reporting support already provided by CAI's Analytics team. As in the current program, we will continue to provide our analytics services, including the creation of new reports and providing ad hoc reports on behalf of users who do not wish to do this on their own.</p> <p>As can be seen, CAI has significantly progressed in the unique features its MSP programs now offer compared to 2017. We have built upon technological capabilities, as well as those tasks and features that are intrinsic to everyday use, making them more practical and functional. We have developed new ways of enhancing the hiring process for contingent labor and have used technology to improve the efficiency and accuracy of our tasks.</p>
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Table 9: Performance Standards or Guarantees

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

Line Item	Question	Response *
45	Describe any performance standards or guarantees that apply to your services	<p>Measuring and setting performance expectations is key to the success of the contract. Success criteria can come in various forms, however what is relevant to each is the patterns and trends that they produce so that we can see where we are successful or where we need to address challenges to improve.</p> <p>CAI takes the approach that program satisfaction is a great indicator of success. Often, we learn things through subjective feedback that a data set might not highlight. This consultative feedback and transparency really enable CAI to focus on the program and each user within the program so that we can bring the value Sourcewell expects for its Member community.</p> <p>CAI may conduct quarterly performance reviews with the Member community. We will present the recorded metrics and discuss the factors around the data gathered, how it came about, what influences might have affected the data, if corrective action is required for any measured area, known or upcoming changes that might affect measured areas, as well as any other items for discussion. We also utilize the internal touch points of our VMS tool to capture the raw metrics for our services. The basic business rules for our MSP engagements align on identical attributes, i.e., speed, quality, and accuracy. As a result, we create a custom dashboard for each Member and use Microsoft Office products to produce our charts and graphs. CAI measures customer satisfaction through automated Candidate Surveys.</p> <p>Measuring Customer Satisfaction with Placed Resources The CAI Account Team reviews and analyzes the results of online surveys provided to Authorized User feedback for trends and areas for improvement with respect to the contracted Resources placed in agencies and other organizations through the MSP contract. An example of the evaluation screen is shown in Attachment E – Graphics Book, Figure 6 – Resource Evaluation Screen.</p> <p>! An online survey form is sent after the first month of an engagement. This survey provides information on early detection of issues with misplaced Resources.</p> <p>! An online survey form is sent after the end of an engagement. This survey measures how well the resource performed, which is an indication of a good skills match, quality of work delivered, and customer satisfaction with the hiring process.</p> <p>! Agency users of the contract with engaged Resources are asked to complete automated evaluations at various (configurable) points throughout a resource's engagement. These evaluations are fully customizable within the VMS system. An example of the evaluation screen appears in Attachment E – Graphics Book. The scores for completed evaluations are stored in the VMS system, and can be reported on (much like all other data in the system).</p> <p>! In some cases, a Customer Satisfaction service level agreement (SLA) is included in the contract. We then compile the results of surveys and report them on a quarterly basis along with the metrics on all contract SLAs. Question 46 describes customer performance metrics in further detail.</p>
46	Describe any service standards or guarantees that apply to your services (policies, metrics, KPIs, etc.)	<p>CAI's methodology provides ongoing quantitative and qualitative analysis of our MSP performance. Our performance standards fall within four categories: SLAs and KPIs, Customer Satisfaction, Provider Performance, and Program Management/Continuous Improvement. Quantitative measurements are captured through detailed reporting in VectorVMS® and can be provided through various reporting activities.</p> <p>CAI's overall performance as the MSP is contractually measured through defined SLAs for each Participating Entity through their participating addendum. We apply the internal data points in our VMS tool to capture metrics on our services that are measured against the contractual SLA targets aimed at speed, quality, and accuracy. An example of the State of Iowa (Sourcewell) SLA's can be found at Attachment E – Graphics Books; Figure 7 – State of Iowa (Sourcewell) SLA Targets.</p> <p>In addition to SLAs, CAI tracks and reports on several KPIs. KPIs are additional metrics used to monitor the ongoing activities of our MSP program and can be viewed as performance trend indicators that drive improvement in process performance and/or program improvement. Examples of KPIs currently measured under our programs are staff augmentation hiring cycle times, SOW requisition and engagement cycle times, SOW milestone approval rates, staff augmentation and SOW requisition response rates, and provider participation rates.</p> <p>Should review of these performance measurements highlight consistent trends leading toward failure and the provider has not remedied the situation after mentoring, then CAI will notify the provider of our intent to terminate the relationship. We discuss Supplier Metrics in the following narrative.</p> <p>Contractor Metrics and Performance CAI generates metrics detailing performance for both internal and external usage of Supplier performance. Performance for staff augmentation Contractors is measured through business intelligence reports generated by VectorVMS®. The Supplier Scorecard and Manager Dashboard measure performance across various standard recruiting metrics such as: number of candidates submitted, number of candidates forwarded to the agency, number of candidates selected for interview, and number of candidates hired. Submittal numbers determine whether Contractors are actively participating in the program. Ratios of candidates submitted vs. candidates forwarded and candidates interviewed vs. candidates hired point to a firm's ability to match candidates with job descriptions and the quality of their recruiting and screening processes. We track metrics on requested but declined interviews, interview no-shows, offers refused, false starts, performance removals, and attrition. These metrics give additional insight into a firm's ability to accurately measure a candidate's commitment to Sourcewell and Member opportunities but also offer CAI insights into current market trends, e.g., if candidates are interviewing for and receiving multiple offers.</p> <p>CAI uses the Vendor (Contractor) Scorecard to monitor a specific Contractor's performance. The scorecard highlights specific points of performance – both positive and negative – and enables the Contractor and the MSP to discuss and evaluate performance and potential areas of improvement. This scorecard is frequently used by the CAI Account Management team when meeting with Contractors to discuss their performance and provide coaching, as it provides detailed insight into where a Contractor is performing well or may be struggling.</p>

Table 10: Payment Terms and Financing Options

Line Item	Question	Response *
47	Describe your payment terms and accepted payment methods?	<p>CAI's standard payment terms are Net 30. However, we understand that Sourcewell Participating Entities may have differing requirements for payment terms and therefore we are flexible dependent on Entity purchasing guidelines or requirements. Payment terms will be finalized in each Participating Addendum. CAI prefers electronic payment, to ensure accuracy and expedite the process. However, we can accommodate payment by check should it be required or necessary in unusual circumstances.</p> <p>Standard Payment Terms Language Contractor is not required to submit invoices to the MSP (CAI). Contractor shall use its best efforts to pay all approved time for the month seven days from the receipt of payment from the Participating Entity. (Example: Payment from Participating Entity for time from May 1 through May 31 was received by CAI on July 1st. Payment to Contractor would be paid by July 8th). 3%/ Net 2 Day Option - Subcontractor shall have the option to be paid no later than the 10th day of the subsequent month for the previous month's labor that is approved in the VMS no later than the 5th day of the subsequent month, subject to a discount of three percent (3%) of the invoice amount to be retained by the Contractor. All time not approved by the Customer in the VMS by the 5th day of the subsequent month but approved by the 19th day of the subsequent month shall be paid on the 23rd day of the subsequent month, subject to a discount of one percent (1%) of the invoice amount to be retained by the Contractor. All time not approved by the Customer in the VMS by the 19th day of the subsequent month shall be assigned an invoice date of the approval date and be paid 15 days after the approval date, subject to a discount of one percent (1%) of the invoice amount to be retained by the Contractor. Once the 3%/2 Day option is selected by the Subcontractor, it cannot be changed by the Subcontractor for a period of six months. To be clear, if the Subcontractor selects the 3%/2 Day option, the Contractor has the option for each Payment Cycle, to accept the 3% discount and pay on the 8th day of the subsequent month as previously described or to forego the discount and pay the full invoice amount on the 45th calendar day following invoice date at its sole discretion. 1%/ Net 15 Day Option - Subcontractor shall have the option to be paid on the 23rd day of the subsequent month (15 days from invoice date) for the previous month's labor that is approved in the VMS by the 19th day of the subsequent month, subject to a discount of one percent (1%) of the invoice amount to be retained by the Contractor. All time not approved by the Customer in the VMS by the 19th day of the subsequent month shall be assigned an invoice date of the approval date and be paid 15 days after the approval date, subject to a discount of one percent (1%) of the invoice amount to be retained by the Contractor. Once the 1%/15 Day option is selected by the Subcontractor, it cannot be changed by Subcontractor for a period of six months. To be clear, if the Subcontractor selects the 1%/15 Day option, the Contractor has the option for each Payment Cycle, to accept the 1% discount and pay on the 15th day after invoice date as previously described or to forego the discount and pay the full invoice amount on the 45th calendar day following invoice date at its sole discretion. The 3%/Net 2-day option and 1%/net 15-day option are only applicable to T&M payments and not SOW fixed price projects.</p>
48	Describe any leasing or financing options available for use by educational or governmental entities.	Not applicable to the services we are proposing.
49	Describe any standard transaction documents that you propose to use in connection with an awarded contract (order forms, terms and conditions, service level agreements, etc.). Upload a sample of each (as applicable) in the document upload section of your response.	<p>CAI has provided several sample documents that will form part of the standard transaction package that we use for each Participating Entity, uploaded to the Standard Transaction Documents section in the portal. Documents are often customized to each Participating Entity's requirements when they sign a participating addendum. Documents will also be tailored for a new contract to include any new terms as part of the agreement.</p> <p>I Sourcewell Subcontractor Agreement The Subcontractor Agreement defines the terms, processes, compensation for Resources, insurance, and payment; it also includes the latest rate card according to agreed contract between Sourcewell and CAI. The Subcontractor Agreement is subject to change throughout the contract period should terms between Sourcewell and CAI change. The Subcontractor Agreement ensures the Contractor is protected, treated fairly, and understands the obligations on them as well as the obligations of CAI to them.</p> <p>I CAI Sourcewell Statement of Requirements (SOR) Template The SOR template allows the Participating Entity to define the requirements for a project that they wish to have completed, via outsourcing to a Contractor to complete. The template defines all the key tasks that need to be met, the questions to be asked, and provides steps to describe the requirements so that each Contractor can provide a complete response and be fairly evaluated against other Contractors.</p> <p>I CAI Sourcewell Statement of Work (SOW) Template The SOW template provides the Contractor the opportunity to offer contingent workers who will deliver a project requiring multiple skill sets to complete it, in a given time frame. The work products will be in the form of deliverables, and payments may be made against completion of those deliverables or progress against the project. The document provides guidance for all information to be completed so that Contractors who can respond to SOW tasks have enough information to provide an SOW response and pricing to deliver the work. Our SOW workflow can be found at Attachment E – Graphics Book, Figure 13 – Statement of Work Workflow.</p> <p>I Example Service Level Agreement – State of Iowa (Sourcewell) CAI has provided a copy of Service Level Agreement metrics created specifically for the State of Iowa. The State of Iowa engaged CAI under the Sourcewell program. Working in collaboration with the State, our metrics are driven by best practices as well as aiming to set a high standard of service for Iowa. The performance standards target industry benchmarks such as Resume Submittal Response Time, Round One Fill Rates, Accurate Billing, and Customer Satisfaction, among others. For example, Resume Submittal Response Time is the measurement of time from receipt of request to delivery of candidate resumes. We set the Standard as 4 business days to provide top 3-5 candidates from our Contractors. The Performance Target is to meet this criterion a minimum of 90% of the time, measured across a Quarter.</p> <p>I Example Policy Document – Sexual Harassment Acknowledgement CAI is cognizant of its responsibility to treat everyone in the workforce with dignity and respect. To that end we have developed multiple policies which set the standard of how we interact with each other, our peers, our coworkers, our customers, and our partners. We set a high standard. Contained within Attachment D – Standard Transaction Document Samples is the Georgia Statewide Sexual Harassment Acknowledgement; the State of Georgia requested that all CAI employees and Contractor employees review and agree to comply with Georgia's statewide Sexual Harassment Prevention Policy. In addition, training was also required to be completed on a yearly basis. The attached document is the attestation form provided to all CAI employees, Contractors, and Contractors' employees to be completed. CAI will develop something similar for each Participating Entity dependent upon their requirements according to state and local law, as well as individual Participating Entity guidelines.</p>

50	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcwell participating entities for using this process?	Yes. CAI can accept the P-card procurement and payment process. Fees will apply in the use of the P-card. We will work with each Sourcwell Participating Entity to understand their procurement guidelines and how the guidelines apply to transactions under the Sourcwell Contract. Applicable P-card fees will be resolved in the Participating Agreement.
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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 *
51	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcwell discounted price) on all of the items that you want Sourcwell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	<p>We propose a pricing model using research data gathered by the Economic Research Institute (ERI) that is competitive and realistically reflects local labor compensation requirements across the regions and states. We also propose a pricing model that allows Sourcwell to support its Canadian Participating Entities. There is no industry standard pricing, so therefore, no Sourcwell discounted price is offered.</p> <p>CAI uses salary data from ERI as a means of determining baseline wages. The ERI is an independent research firm whose algorithms and data have been in use for the past 30 years; it does not offer consulting services, i.e., it has no self-directed incentive for modifying its metrics. In our many years of providing MSP services to various government agencies, we have found the ERI data to be extremely accurate for estimating salaries by position description and geographic location.</p> <p>CAI then determines the vendor rate by deriving the markup on the wage rate that covers all costs and obligations that any employers must pay prior to calculating a profit. In developing a subcontractor markup for the contract, we created a formula to cover their payroll costs, employee benefits, contract expenses, and modest pre-tax profit. This becomes the rate per hour that the vendors are paid for their selected Resources.</p> <p>It is upon this vendor rate, or labor rate per hour, that the MSP service fee is applied and becomes the bill rate to our customers. The MSP service fee covers the cost of doing business for CAI. These are reasonable costs for doing business, such as our own labor costs as well as administrative fees for the VMS tool.</p> <p>CAI analyzes the ERI data and makes recommendations to our customers regarding increases or decreases to the contract rates. The final decision on changes to rates rests with the customer; CAI adheres to those decisions. We will continue to conduct these reviews on a frequency acceptable to the customer.</p> <p>Canadian Pricing Model</p> <p>CAI's developed pricing model has minor differences between Canada and the U.S. The concept – an hourly rate all-inclusive of fees – remains the same. The hourly rate is multiplied by number of hours required to meet the requisition. To develop the proposed rates, CAI has used data from ERI which provides concise and accurate detail of market rates both within the U.S and Canada.</p> <p>The significant difference in pricing models that CAI proposes is the variation in country currency and exchange rate, and the applicable tax vary for each country, and each state or province within each country, dependent on currency used, and national and local tax laws and employment laws by state or province. For example, CAI will work with the each Sourcwell Participating Entity and supplier to establish the process regarding overtime and overtime pay. Overtime rules are driven by the employing organization and are dependent on state or provincial laws. We will establish up front how this is to be operated and it will be included in the subcontractor agreement with the supplier who represents the resource performing the work.</p> <p>For a contract that is used to acquire Resources to perform services, items are not associated with a SKU but a job title. CAI proposes a list of industry relevant job titles grouped by functional area that are broad enough to encompass the needs of any IT organization. Participating Entities will select one of three pricing 'financial tiers' which will align them more closely with pricing for their location.</p>
52	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.	<p>CAI has provided a tailored pricing solution for Sourcwell with a not-to-exceed rate card. The pricing is based upon T&M and customized to labor categories and geography.</p> <p>MSRP does not apply to IT MSP services. We do not provide MSRP or published list prices; therefore, we do not have a scale to discount against. Our pricing proposal is presented against the very latest pricing data provided by ERI.</p>
53	Describe any quantity or volume discounts or rebate programs that you offer.	<p>CAI can provide discounts based on volume of engagements. Upon reaching specific thresholds, CAI can provide a rebate for usage. This will be determined during the kickoff with each Sourcwell Participating Entity so that we can set the thresholds based on expected requirements.</p> <p>The rebates will be returned at the highest organization level and the organization will reimburse the particular Participating Entity that used the service.</p>
54	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.	<p>CAI can provide 'sourced' services. CAI determines this as the Sourcwell Participating Entity requesting a specifically named resource with whom they are familiar. We will ask the supplier who represents the resource to provide availability and if the requested resource is available the resource can be engaged. The PO process and payments remain the same according to the rate card.</p> <p>In some instances, an exception is required when a labor category may not meet the requirements of the Sourcwell Participating Entity. Our rate card is very broad with the goal of encompassing all potential requirements; however, should a new skill set be needed we will quote on an individual basis using pricing data from available Resources. The new labor category can then be added to the Sourcwell Participating Entity's rate card.</p>

55	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	All pricing is included in the pricing proposal for standard services identified in the Sourcewell contract. No additional costs associated with any standard services for implementation and installation, training, delivery, or otherwise are to be expected. Additional one-time costs may be incurred by the Member if they add additional requirements or tasks via their Participating Addendum such as integrations.	*
56	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	Freight, delivery, and shipping costs are not applicable to the services CAI is proposing on this Contract.	*
57	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	To provide the proposed services, CAI's process only differs in that Canadian delivery requires a change in payment and billing activity due to the value of the Canadian dollar. Provision of services to Alaska and Hawaii may be affected by the ability to find local staff that have the skill sets to meet the Sourcewell Participating Entity requirements. In some instances, the Sourcewell Participating Entity will have to allow for a travel budget or for the Resource to work remotely to find the correct skill set. Travel expenses can be submitted to allow for auditing and Participating Entity policy requirements for travel and reimbursement. As the RFP reflects the potential interest and usage by Canadian provinces, CAI has established a 'provisional' rate card based upon the same proposed labor categories for the U.S. market, but using current Canadian labor rates. However, CAI would suggest that an approach to Canadian and foreign markets would be to agree to a currency exchange rate at the start of each participating addendum which will then be in place throughout the period of performance. Should a participating addendum be renegotiated, extended, or change in requirements be requested, CAI and the Sourcewell Participating Entity will reevaluate the exchange rate to ensure that the rate is being best reflected. This approach allows for fluctuation in the currencies being used and will serve the best interest of the Sourcewell Participating Entity, who may not wish to be locked into set rates for the entire four years.	*
58	Describe any unique distribution and/or delivery methods or options offered in your proposal.	CAI's proposed model is based upon an open enrollment supplier pool that is nationwide and non-restrictive. This approach allows us to capture significant small and disadvantaged business participation from across the country.	*

Table 12: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
59	c. better than the Proposer typically offers to GPOs, cooperative procurement organizations, or state purchasing departments.	Please see Attachment A – Pricing.

Table 13: Audit and Administrative Fee

Line Item	Question	Response *
60	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed Contract with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing, that the Vendor reports all sales under the Contract each quarter, and that the Vendor remits the proper administrative fee to Sourcewell. Provide sufficient detail to support your ability to report quarterly sales to Sourcewell as described in the Contract template.	CAI has self-audit methods used throughout our process to ensure compliance to our contract. Rate Validation - The contractual rates are loaded into the VectorVMS® application and will prefill on the requirements when they are submitted. This ensures no deviation from the rates associated with the various job titles per our contract with the Sourcewell Participating Entities. When a requirement proceeds through the approval workflow, the CAI Account Manager once again validates the rates based on the selected job title. A requirement will be rejected and returned if the rate is out of compliance. Finally, when a resource is selected and engaged within the VMS, the rates are once again validated to ensure both the Sourcewell Participating Entity is being charged at the contractual rates and the vendor supplying the resource is being paid at the contractual rates. The administrative fee payments are generated from CAI's financial system, Workday. The payments are validated by comparing the detail generated from Workday against detailed reports generated from the VMS, confirming the fee is being paid against the revenue generated for the quarter based on the approved time in the VMS.
61	If you are awarded a contract, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the contract.	With several years of experience working with Sourcewell under our belt, CAI will continue to develop the internal metrics we can use to measure and monitor how successful the program is and the trends it is developing so that we can capitalize further. I We will track the successes of our marketing efforts using metrics on the number of people contacted during a marketing campaign. Of these contacts we measure how many resulted in conversations, and then how many led to the contact engaging CAI and the Sourcewell program to deliver IT staff augmentation services through the resulting participating addendums or contracts. We follow this further with how many placements have been made. We use contact management tools such as 6Sense and Act-On to manage the process, tied to our Salesforce platform to ensure management oversight and review for accuracy. I We use Workday to track all our financials. Our financial team, using PowerBI, has created reports that allow us to track growth year over year and month over month. We produce forecasts for 3-6 months in the future and compare the actuals against the forecasts each month. I We develop trend reports using the VectorVMS® to monitor the growth of the program – detailing the growth in clients, engagement headcount, and spend. This approach holds CAI accountable internally for the growth of the program against contribution to the business, so is a key validation metric. I CAI implemented Salesforce in 2020 to improve upon the way we manage and measure our ability to capture, retain, and grow new business opportunities. Salesforce has helped CAI refocus and better strategize our approach to our customers, new and old alike. With this implementation, new Sourcewell opportunities will be better managed. Greater accountability is given to client success and satisfaction through the workflows developed specifically for CAI. New opportunities are internally reviewed and measured so that we can provide the correct level of engagement and support. This means that the Sourcewell account is monitored through internal metrics so that we are always responsive and efficient, with accountability for success held by senior management.
62	Identify a proposed administrative fee that you will pay to Sourcewell for facilitating, managing, and promoting the Sourcewell Contract in the event that you are awarded a Contract. This fee is typically calculated as a percentage of Vendor's sales under the Contract or as a per-unit fee; it is not a line-item addition to the Member's cost of goods. (See the RFP and template Contract for additional details.)	CAI is proposing a 1% Sourcewell administrative fee to be calculated as a percentage of Vendor's sales under the Contract.

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

Line Item	Question	Response *
63	Provide a detailed description of the equipment, products, and services that you are offering in your proposal.	CAI offers a full-service model of IT Managed Services and Staff Augmentation Solutions to Sourcewell, Members, and our Contractors. This means defining the business processes for procuring contingent labor as well as managing the supply chain through the MSP. We automate the supply chain, configuring the VectorVMS® tool – retaining our existing platform – to support the Members' goals and objectives. CAI will evaluate each Member independently as we engage with them and determine the requirements for account management on a case-by-case basis. Our Account Managers' role will be to provide the consultation needed to ensure that the process is operating smoothly and that suppliers are getting the correct information so that they can provide Resources able to perform in the required roles. The growth we have seen with the City of Long Beach, CA, is a prime example of the importance and success of the account management function. Below we describe the key components that make up our service. Temporary staffing across 143 discrete positions, nationwide. We will provide temporary staffing services for IT professionals based on specific requirements from the requesting Member agency. We will fill positions via a nationwide subcontractor network established that has already been established for this contract. Sourcewell and its Member community will continue to benefit from a range of Resources that can meet unexpected short term needs through to longer engagements. Our goal throughout has been to support the Member community with qualified staff who can engage quickly and bring the needed value, experience, and skills. Having managed the program successfully since 2017, we have developed an understanding of Member requirements, what their expectations are, and how best to meet them. This is met with high retention rates, first time fills, competitive

rates that the Member can support, and strong account management that can translate Member information and needs into a statement of requirements that the resource understands, and the subcontractor network can fill.

We are also prepared to supply additional types of labor should Sourcewell and its Members identify further needs not covered under the new contract but driven by new technologies as the contract progresses into later years.

Network of Contractors across the nation. CAI has served as a partner to Sourcewell, and by extension, a partner to those Members who have used our services to date. This is evident based upon the spend driven by such Members as City of Long Beach, CA, and Orange County Fire Authority, CA, who have significant spend through the program. However, what really proves the program's success are those Members who have engaged for smaller, unique requirements. This was a driver in the original program: providing services to local and county government who could not participate in a large state-wide MSP program due to higher fees, difficulties with approvals, or the simple need for very short-term engagements that do not align well with a major program. We will continue to use a process designed to provide Members with qualified, cost-effective contingent staff. The current subcontractor network has proven agile and flexible when supporting Member requirements to date. CAI will review the current network, ensure that current Contractors are adding value, and make recommendations and changes to increase the value and capability of the network.

Contractor Information Site and Self-Service Management Portal. CAI has maintained a public-facing website for each MSP program with contract data and rate information since signing our first MSP contract in September 2004. This will continue for Sourcewell and its Members throughout the new contract. Our initial goal was to ensure consistent communications with the supplier network, but the portal has since turned into a "one stop" location for all key information related to any MSP program. As a partner with our public sector clients, we are also pledged to transparency across the procurement chain. Suppliers can easily see detailed information about all contracts, job categories, labor rates, etc. This includes performance metrics on themselves and all other vendors – a form of absolute transparency across the supplier community.

CAI also provides a hosted self-service portal where suppliers can provide their enrollment information, including documentation required for the specific state contract. It serves as a repository for contract and compliance documents.

Engagement with the small and diverse business community. For diverse suppliers, we have confirmed their credentials. Our goal is to act as an incubator or mentor to small, diverse business, encouraging their participation and promoting their usage where appropriate. We will review this information with Sourcewell as part of contract development, identify relevant flow down requirements, and develop a standard subcontract for use by all participating Contractors. We will then utilize this for the life of the contract with the supplier community. This provides a fully transparent means of scrutinizing suppliers and broadening the number of Contractors who may wish to participate after contract execution.

Account Management. We will continue to provide an account management team for the Sourcewell program. Our account management team will continue to be spread nationwide to service Members as needed. Our account management team is further supported by our CWS Operations and Analytics teams as well as CWS leadership in Harrisburg, PA. This allows CAI to be responsive and resolve questions and issues quickly, placing the Member at the center of the process. CAI's staffing plan ensures a deep understanding of Member specific needs by assigning dedicated account managers as the program grows. Our Account Managers are tasked with working closely with Members to fully understand their IT environment, IT projects, needed IT skill sets, cultural environment, procurement, and financial processes. Our in-depth knowledge of the agency, IT, procurement, and financial processes enables us to deliver better quality staff augmentation Resources and SOW projects faster and more efficiently.

Our staffing plan further improves delivery of the Account Manager's experience and knowledge of staff augmentation and SOW requirements for the Members. Our Account Managers have years of experience in the IT staffing industry and have all served as IT recruiters. They have broad knowledge of the IT markets, local staffing firms, and local IT talent. They understand the challenges our suppliers face in delivery because they have been in that role themselves; as a result, they can provide coaching and mentoring to our partner firms on how to be successful under the program. This all adds up to a better, faster service, for Members and Sourcewell.

Comprehensive MSP management system, available 24x7. Our solution also includes an integrated set of software tools to manage the process with which Sourcewell and its Members are already familiar. The continuation of understood and proven technology stack adds value to Sourcewell. It is easy for Sourcewell to sell services they understand and are familiar with; the Members know how to engage with the system and do not have to manage change to a new product; and both Sourcewell and Members know that it integrates with their current environment. CAI is offering continuity and flexibility in a seamless transfer from one contract to another; a value that will be felt by Sourcewell Members. All components of the VectorVMS® application operate in a highly secure cloud environments located in the U.S. These include the following:

Workflow/Contract Management Tool. We will continue to utilize VectorVMS®, an industry-leading VMS that allows us to streamline the entire requisition process. It is a cloud-based ecommerce site available 24x7 to all Members. This is the primary tool that Members will use for documenting requirements for contingent staff, i.e., requests for IT professional staff; reviewing resumes; and approving timesheets. It is available via web browser as required. Hiring agents can also use the mobile app, if desired, to perform routine functions such as approving timesheets, requisitions, and expenses.

Financial and Accounting (F&A) System. VectorVMS® has a direct interface with our enterprise resource planning (ERP) system, Workday, which is the source of financial transactions for our business. Contractors can then easily track upcoming invoice payments for labor performed by their employees. We generate their invoices to CAI directly aligned with the invoices we send to state agencies. We also generate this data electronically to enable them to easily balance invoices within their own F&A systems.

Reporting. The core VectorVMS® module has 115 standard reports. Many reports contain both representative data and summary graphics. The sections below depict some of those we believe are most relevant to Sourcewell and its Members. These examples are generated using configuration information relevant to Sourcewell based upon current contract details or based upon example

information from another MSP program to illustrate the point; please note we have modified the content to prevent disclosing information on specific individuals or vendors.

Member Overview. We can provide Sourcewell with a Member Overview report, Attachment E – Graphics Books; Figure 8 – Member Overview Report. It is a high-level view of the contract across all members, locations, requisitions, and Contractors, as summarized in the accompanying example.

Manager Dashboard. The Member Manager Dashboard – Attachment E – Graphics Book, Figure 9 – Member Manager Dashboard – provides summary statistics on all engagements and open requisitions. It also provides analytics data on the engagements, timesheets for all engagements, and the status of open and pending requisitions. The bottom half of the dashboard shows vendor utilization in filling the engagements.

Other Frequently Used Reports. Other popular reports include:

PO Audit Report. This shows hours and dollars left on the PO, compared to hours and dollars within the MSP management system. It uses color coding to highlight engagements where there is an imbalance between hours/dollars on the requisitions and hours/dollars on the PO. This enables the hiring manager to adjust the PO in a timely fashion.

Candidate Compliance Items. This lists candidates and the various documents/certifications required for their engagement.

Overtime Timesheets Report. This shows candidates with overtime hours on their timesheet for a given reporting period.

Supplier Documentation Report. Many of our contracts have documentation requirements specific for disadvantaged business enterprise (DBE) firms. This report tracks the expiration date of certifications on file and enables us to proactively contact vendors to obtain renewal certificates. Requirements vary by state and given the nationwide approach to the Sourcewell cooperative, CAI will track that information within the VMS to assist Sourcewell.

Ad-hoc Reporting. We will provide Sourcewell and its Members with direct access to ad hoc reporting, as required. Members can take advantage of advanced editing capabilities to create reports and/or create new versions of existing reports ("clones"). They can create a report directly from any Summary page within VectorVMS®. For instance, they might see a summary page listing all their engaged Resources. Using this baseline data, they can add/remove columns, then quickly export this summary into an Excel spreadsheet. As noted earlier, their access to specific data elements is based on their role: Sourcewell has access to all data, and Members have access to their own agency's data.

Customer Satisfaction and Performance. Our approach to customer satisfaction is discussed in Question 61, above.

Billing and Invoicing. The standard process is to produce a single invoice per PO with the data subtotaled by PO line item and Resource, generated monthly. CAI provides invoice detail reports before the final invoice is sent, which an agency can use to validate the information being invoiced. CAI audits every invoice before it is sent to the agency by comparing the approved timesheet information from the VMS against the invoices generated from our financial system.

If a PO contains multiple line items to accommodate multiple funding sources, separate timesheet projects are configured in the VMS allowing the Resources to enter time against the specific line items that are then reflected on the invoice.

CAI uses the integration provided via the VMS to download approved timesheet data into our Workday financial system. The timesheet detail is segregated by Member, PO number, line item, and Resource; this allows us to generate an invoice with as much detail and summarization as specified by each agency for each PO. These invoices can be emailed directly to any specified agency representative.

Resources use the MSP management system to submit their timesheets on a weekly basis. They do this using PCs or the browser interface on their smart phones. Contractors also have proxy authority to submit timesheets on behalf of their Resource.

The process for approvals is also fully automated. For Sourcewell Members, this includes four major functions:

Timesheets. Hiring Managers should approve timesheets on a weekly basis for all temporary staff working under their supervision. They can also delegate this authority, such as coverage when they will be out of the office or on vacation.

Requisitions. Hiring Managers must create the original staffing request. Depending on configuration, the requisition itself may require other approvals prior to release to CAI.

Engagements. After reviewing candidate profiles (and conducting interviews, if desired), the hiring manager must accept the designated candidate by formally requesting him/her.

Expenses. The MSP management system also allows for processing expense reports, i.e., occasions when temporary staff submit expenses for reimbursement. Any reimbursable expenses will follow state or local guidelines and require preapproval by the Participating Entity.

Members can easily perform these approvals directly from their dashboard in the online interface, Attachment E – Graphics Book, Figure 10 – My Tasks Screen. When they click on the icon, the MSP management tool launches a page with the items requiring action. In this example, the open action items awaiting approval are new requisitions, requisition with a candidate awaiting review, and timesheets for currently deployed temporary staff.

Security. The VMS uses role-based security to determine which reports, screens, data, and portions of the system each Member user may access. Each role in the system is determined by Sourcewell and configured during implementation. The roles are then assigned to Member users based on their required privileges. For example, when creating ad-hoc reports, the Member user is only allowed to access their data.

CAI has summarized the benefits of its solution below.

Provide a reliable and easily accessible Managed Service Solution

We will utilize VectorVMS® as the technical MSP solution. It is available 24x7x365 in a hosted

		<p>environment, including mobile access, and is directly accessible to both Sourcewell and its Member community.</p> <p>Ensure that staffing Resources are available nationwide</p> <p>In bidding, we have retained and added to a large diverse supplier community available to supply staff across all proposed labor categories nationwide. Our solution is a highly integrated government- and customer-focused solution that brings best practice for engaging staffing Resources into the Member community.</p> <p>Provide qualified personnel based on job description</p> <p>We will load the VMS tool with job titles, narrative descriptions, and rates. We will create templates to enable Members to easily develop accurate requirements for the specific opportunity and require suppliers to respond item by item to each requirement. The VectorVMS® provides dashboards to enable CAI and Members the ability to compare candidates and how closely they match specific requirements.</p> <p>Aid Members to resolve employment issues or replace personnel</p> <p>CAI serves as first POC for issues related to the contingent Resources and their performance. We will work directly with the Member and the individual to resolve issues, providing a responsive resolution. This may involve removing the individual from their assignment, for example, or it may involve facilitating their reassignment to another Contractor. We will also arrange for replacement personnel if needed.</p> <p>Processing Member requirements</p> <p>We will work with all parties to ensure that requirements are clear and to provide qualified Resources as quickly as possible. We will confirm details of the workflow described throughout this proposal, including integration with Member-specific requirements. Our objective is to implement a highly focused, easy-to-use process that provides Members with immediate access to a wide variety of temporary workers across the nation.</p> <p>Invoicing and receipts</p> <p>We will create and distribute invoices that are timely and accurate. Resources will record their hours in VectorVMS®, and Members can approve timesheets electronically via mobile phone or web browser interface. This maintains an audit trail for invoice data. During kickoff we will finalize the details and format of invoices, tailored to Member requirements.</p>
64	<p>Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.</p>	<p>Typical subcategory titles may include:</p> <ul style="list-style-type: none"> Temporary Staffing Services Contingent Workforce Solutions IT Contingent Labor Services Contingent Labor IT Consultants Temporary Labor IT Staff Augmentation Recruitment Services

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
65	Information Technology Managed Service Provider	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
66	Information Technology Staff Augmentation Services	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A
67	Services related to the offering of the solutions described in Line 64 and 65	<input checked="" type="radio"/> Yes <input type="radio"/> No	N/A

Table 15: Industry Specific Questions

Line Item	Question	Response *
68	Describe your contractor candidate recruitment, screening, selection, and retention capabilities and processes.	<p>Our proposed solution is an integrated ecommerce workflow, with touchpoints for all stakeholders relevant to their role in the contingent staffing process. At the heart of this is an MSP management system configured for Sourcewell and its Member community. During transition to the new contract, we will load it with the job titles and rates defined in the contract and create workflow documents and other training materials for stakeholders. If appropriate, Sourcewell can include these as reference material for Members. The image in Attachment E – Graphics Book, Figure 2 – Integrated Workflow for Temporary Staffing is a high-level view of the procurement process, from the initial requisition by a Member until the point where the IT contingent worker begins their assignment. Email and automated notifications occur throughout the process based on events, i.e., release of a requisition to the supplier network, availability of candidates for interview, etc. VectorVMS® maintains timestamps on notifications, approvals, and other transactions. These in turn provide the data points needed for performance reporting.</p> <p>Contractor Candidate Recruitment CAI and its network of Contractors will each have a slightly different approach to recruiting Resources. CAI does not dictate the recruiting practices of its Contractor network. However, we do define the expectations placed upon the Contractor for participation in the network, and that includes the careful resourcing, screening, and selection of potential candidates to be presented to the Member for each role. When a Contractor has resourced, screened, interviewed, and completed the various checks required by either the</p>

Sourcwell contract or by CAI, the Contractor will submit the candidate into the VMS. The VMS has built in checkpoints – Compliance Manager – which we can configure to ensure that we capture all necessary information for an individual to work for a Member. If the Contractor is unable to provide that information – be it a document testifying to a requirement, a checkbox that suggests completion of a drug test – the system alerts both CAI and the Contractor. The Contractor is unable to complete the submission if all requirements are not complete. The CAI Account Manager works with the Contractor to assist, helping them if it is a simple administrative issue, or coaching them through how to complete the process if they are, for example, a new supplier. Our goal is to make sure that candidate submission is risk free, as clearly defined as possible, and encourages participation from Contractors – but most importantly provides the benefit to the Member and Sourcwell so that repeat business adds value to the program. The Subcontractor Agreement captures the expectations from the Contractor, and our support materials and Account Managers provide the additional assistance needed.

Screening

The first responsibility for screening/evaluating candidates falls to the staffing Contractor. Successful Contractors in the program become familiar with the skills commonly requested by Members and build pipelines of passive candidates that have been fully vetted for future state opportunities. Our Contractor's IT recruiters are responsible for 'closing' both active and passive candidates on their requirements for pay rate, opportunity, availability, and travel and/or relocation. Contractors must validate a candidate's resume and technically screen for proficiency with specific technologies. When a Contractor submits a candidate through VectorVMS®, there is a series of check boxes or input fields for affirmation of key data, such as the skills the candidate possesses and his/her availability. The Contractor must respond to each required and desired skill and note the candidate's years of experience in each one. The Contractor can use a free form text field to provide relevant information as to why they believe their candidate is qualified for the specific position. Following submission, the CAI Account Manager conducts phone screening calls and verbally screens before forwarding each candidate to the agency as part of our standard process. This adds an additional layer of validation to our quality driven approach regardless of the number received.

During that screening, the CAI Account Manager validates the submitting vendor; the candidate's interest level, skills match, communication skills, and timing for availability; other opportunities they are currently interviewing for; and in some cases, the end date of their current engagement. Through this screening process, the top candidates – a minimum of three – are selected and forwarded to the Agency User through the VMS. The Compliance Manager will require evidence that the candidate meets residence requirements for the period of the engagement. Resumes will be submitted between two to four days dependent upon the SLA.

Attachment E – Graphics Book, Figure 11 – Compliance Manager Screen Example lists the required/desired skills from the requisition and the candidate's years of experience for each. It also shows the candidate's answers to any questions asked in the requisition.

When screening candidates, CAI Account Managers assesses a candidate's depth of experience using a particular skill through an extensive discussion of a candidate's work history – the projects they worked on, their roles on those projects, and how each technical skill was used on the project. The Account Manager then determines if the candidate's skills match those required for the specific DAS position.

When necessary, CAI Account Managers conduct an additional screening of technical fit before forwarding any candidate to the agency. Information is gathered in the VMS, so that the Agency User can further evaluate feedback provided by the CAI Account Manager. This information can be expanded upon at any time.

Selection of Candidates

To build on the screening process and enable candidate selection to be efficient and compliant, CAI uses the power of the VMS to provide candidate-compare and scoring data. VectorVMS® calculates a Composite Score for every candidate submitted. A candidate's Composite Score is a measure of how closely the candidate meets the necessary experience levels for the skills listed on a specific requisition. If a candidate meets the experience level for each listed skill, the candidate's Composite Score will be 100%. The Composite Score is decreased if the candidate does not meet the experience level for one or more listed skills, and the Composite Score is increased if the candidate exceeds the experience level for one or more listed skills. The Candidate Compare screen in Attachment E – Graphics Book, Figure 12 – Candidate Compare Screen provides a side-by-side comparison of selected criteria.

VectorVMS® supports candidate ranking and candidate comparison through the Candidate Compare functionality. Candidate Compare expands candidate screening and reviews well beyond deployable ratings and composite scores. Candidates are reviewed side by side initially using the default criteria, or each reviewer can apply their own set of criteria.

Candidate Compare allows CAI Account Managers to narrow the set of candidates submitted to a contingent requisition according to attributes that meet their needs. Candidates can be compared/ranked using individual required/desired skills, composite scores, configured rates, global skills, previous Sourcwell or Member employment indicators, screening indicators, and a 'deployable rating'. The 'deployable rating' function allows the Account Manager to rank candidates from 1 (worst) to 10 (best). In times of high demand or surge, we use this feature as a subjective measure of the submitted candidates' abilities following their review. The process allows for faster shortlisting, filtering candidates based on a subjective ranking to present the top candidates quickly.

Once candidates are submitted against the requisition, the Account Manager can choose to compare the candidates' skills and experience, as demonstrated by the Candidate Compare feature. After clicking on the "Compare Candidates" button, the user is directed to a page that matches the candidates/Resources side-by-side, based on the selected criteria. The Agency User can also use this functionality to compare the candidates received from CAI.

While the Candidate Compare functionality is a valuable tool in the screening process, it is important to note that candidate ranking is not a replacement for the phone screening but a complementary action that is rapidly improving with the potential integration of AI-based screening solutions that help the process.

Currently automated candidate ranking functionality may be limited to either candidate qualification information provided by the Contractor, or to information provided within a candidate's resume.

The Candidate Compare functionality and Composite Scores can be helpful in an initial pass of submitted candidates, especially considering CAI often receives more than 100 submissions for each requirement. A live phone screen by an experienced CAI Account Manager can flesh out whether a candidate's presented skills/experience information is legitimate. A phone screen helps determine communication skills, confirm candidate availability, and any other opportunities they are pursuing. During the phone screening we also evaluate skills and experience and make sure the candidate responses are aligned to their resume. This means that by the time the candidate is submitted to the agency, the composite score is as accurate as possible.

Retention

Retaining quality Resources is a real challenge in today's global labor market. While everyone is personally motivated by different offerings, we believe that competitive salary, good benefits, and the opportunity to learn and grow are our best instruments for keeping our candidates engaged, as well as ensuring the MSP program is competitive to our Contractors so that they can onboard and retain their best staff.

l Provide competitive compensation

Candidates receive competitive salaries/hourly rates according to fair market value. CAI will provide a rate card and labor categories that allow each Contractor to pay their resource fairly. We will pay the Contractor when paid by the Member. Our Subcontractor Agreement has a net 5-day payment clause to pay the resource following the Contractor being paid by CAI. For contingent labor this is the most practical and required retention strategy.

I Provide interesting, fulfilling work

In our experience, most technical staff enjoy working in an environment where they can creatively problem-solve by executing technical tasks. We want to help create a fulfilling work environment by establishing the framework for executing their tasks, such as the controls in place for defining and assigning work; completing assignments; and seeing the benefit within their technical and business environment. We work with the Member Hiring Managers to reach this goal wherever possible.

I Foster a supportive environment

CAI Account Managers have the responsibility for staff retention of those onboarded through the Staff Augmentation. While these Resources are not CAI Resources, we take the approach that work satisfaction is key and so will engage with Contractors to make sure their staff are fully supported. It is the providers and CAI's responsibility to ensure team members have the tools, training, and support to be engaged, satisfied, and productive. We maintain a high job satisfaction rating by providing the right individuals with the proper tools and recognition. We value all our associates and make sure they are aware of this fact. Candidate Compare allows CAI Account Managers to narrow the set of candidates submitted to a contingent requisition according to attributes that meet their needs. Candidates can be compared/ranked using individual required/desired skills, composite scores, configured rates, global skills, previous Sourcewell or Member employment indicators, screening indicators, and a 'deployable rating'. The 'deployable rating' function allows the Account Manager to rank candidates from 1 (worst) to 10 (best). In times of high demand or surge, we use this feature as a subjective measure of the submitted candidates' abilities following their review. The process allows for faster shortlisting, filtering candidates based on a subjective ranking to present the top candidates quickly.

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69	Describe your process for development of participating entity statements of work, service levels, quality control plans, and performance standards (as applicable).	<p>In the following narrative, CAI has provided detail concerning the development of plans and processes that define the success of the Sourcwell contract, and how we will engage each Participating Entity to deliver the best possible service, as we have demonstrated over the last five years.</p> <p>Statement of Work As we engage with each Participating Entity, CAI treats the new engagement as a 'new implementation'. Each Member has specific demands to be met through the program and internally. In each case CAI performs a need analysis, getting to know what is and is not required, sharing best practice ideas, collaborating with the customer, and understanding what their expectations are from the service provided under the Sourcwell contract. These specific terms are then identified and executed via a Statement of Work or Participating Addendum against the standard Sourcwell contract.</p> <p>Service Levels CAI understands that each Member or Participating Entity will have a need to develop its own set of service levels based upon its need to meet legislative requirements and procurement requirements. A small, local entity might have very minimal requirements based simply on the volume of contingent labor it needs or because local reporting requirements are different to those of a state or city who also may purchase from the contract. CAI has been a leader in the MSP market since 2004 and our success to date, treating each client uniquely, has set us aside from our competition. As an example, CAI engaged at state-level with the State of Iowa to utilize the Sourcwell contract. Bringing our own experience and best practices and taking the time to listen and understand what the State needed, we collaborated to develop a series of 9 measurable service levels. These are identified in Attachment E – Graphics Book, Figure 7 – State of Iowa (Sourcwell) SLA Targets. CAI helped the State of Iowa understand what they need, why it should be recorded, the reporting period, and how the service level can help with growth and success of the program. For example, looking at the Round 1 Fill Rate, the State had high demands in terms of new requirements to meet State IT objectives. It needed the candidates submitted to be qualified and able to perform the job quickly. Therefore, CAI suggested a service level that targeted the need for positions to be filled by the first round of candidates submitted by Contractors. The State did not have the time or Resources to wade through multiple rounds of candidate submittals to find the best candidate. In targeting a high, 90% first round fill rate, CAI had to collaborate with the State to gather all the necessary information for the role and collaborate with the Contractor community to make sure they had all the information they needed, realistic rates, and a target start date. In being well prepared, CAI was able to meet the suggested target. This provides the State with three pieces of information that are used to verify the success of the metric: the position development process is accurate because the Fill Rate is high; secondly, because of the accurate level of information being provided to Contractors they can resource the ideal fit candidates based upon the parameters provided; and thirdly, this shows the Contractor network is working well and responsive. CAI will follow this process, using some or all of the examples, or other criteria as needed to work with each Participating Entity and build service levels which drive the success of their participation in the Sourcwell contract.</p> <p>Quality Control Planning CAI follows the Project Management Institutes (PMI) guidance on project quality control across all facets of its delivery. Our MSPs are subject to the same rigors. We have developed a series of plans and documents that define how we approach quality management throughout the engagement with the Participating Entity. The processes aligned to PMI may include Quality Planning, Quality Assurance, and/or Quality Control. Using our experience, lesson learned, and templates to assist, we will develop appropriate plans for each Participating Entity. The approach sets the standards for good performance. As such, we have developed various processes and techniques to implement and maintain a Quality Assurance Plan throughout program delivery that will be tailored on a case-by-case basis for each Participating Entity. As is industry standard, CAI's strategy when implementing quality practices follows the Deming model comprised of Plan, Do, Check, Act (PDCA), as well as elements from other industry standards such as PMBOK and ITIL. This continuous feedback loop places quality in each activity that is done, rather than relegating quality to one specific phase or role in an initiative or project. An example of our quality control process is targeted at candidate review prior to submission to a Member User. CAI's project team or account manager reviews submitted resumes that have met specific criteria before releasing those resumes to the Member via the VMS. A key step in the review process is the phone screen. This is an important quality control point. It allows us to gauge the candidate's technical ability, availability, communication skills, manage fraudulent misrepresentation, evaluate 'right fit' – i.e., will they work well in the new environment, and verify certifications and other claims made. Adding this step alongside the Compliance Manager tool in the VMS provides quality control that is not provided by other MSPs who may even use the same VMS to screen or rely entirely on their subcontractor network to 'get it right'. We will partner with each Participating Entity to infuse quality in the service of delivery, initiative, and interaction. An engagement executed with a service-first mentality – concerned about the quality and results of our processes – means better outcomes for each Member.</p>
70	Describe the range of IT MSP or Staff Augmentation service contracts (as applicable) that you have completed in the government sector (smallest, largest, average).	<p>The following information provides details on the range of IT MSP Staff Augmentation contracts currently being managed by CAI:</p> <ul style="list-style-type: none"> Our largest client is Virginia Information Technology Agency, with total \$896.3M spend. Our smallest contract is Sourcwell, with \$16.3M spend. However, note that the State of Iowa is delivered via the Sourcwell contract, adding another \$196.2M to the total Sourcwell value. Our average MSP contract average to date is \$315.96M in total spend.
71	Describe the range of IT MSP or Staff Augmentation service contracts (as applicable) that you have completed in the education sector (K-12 and/or Higher Ed - smallest, largest, average).	<p>The following provides details on the range of Education-related services provided under our MSP Staff Augmentation contracts currently being managed by CAI:</p> <ul style="list-style-type: none"> Virginia Information Technology Agency MSP has spent \$13.65M across the Education sector. The State of New Jersey has \$17,367.80 spend across the Education sector. Our average spend across the education sector under our MSP programs is \$4.03M.

Table 16: Exceptions to Terms, Conditions, or Specifications Form

Line Item 72. 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

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

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
 2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
 3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
 4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as "Marketing Plan."
- [Pricing](#) - Attachment A - Pricing.xlsx - Friday July 09, 2021 12:57:40
 - [Financial Strength and Stability](#) - Attachment B - CAI Financial Statements.pdf - Friday July 09, 2021 12:58:09
 - [Marketing Plan/Samples](#) - Attachment C - CAI Marketing Plan.pdf - Friday July 09, 2021 14:37:01
 - WMBE/MBE/SBE or Related Certificates (optional)
 - Warranty Information (optional)
 - [Standard Transaction Document Samples](#) - Attachment D - Standard Transaction Doc Samples.pdf - Friday July 09, 2021 13:16:27
 - [Upload Additional Document](#) - Attachment E - Graphics Book.pdf - Friday July 09, 2021 13:16:42

Addenda, Terms and Conditions

PROPOSER AFFIDAVIT AND ASSURANCE OF COMPLIANCE

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

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for contract award.
3. The Proposer, including any person assisting with the creation of this Proposal, has arrived at this Proposal independently and the Proposal has been created without colluding with any other person, company, or parties that have or will submit a proposal under this solicitation; and the Proposal has in all respects been created fairly without any fraud or dishonesty. The Proposer has not directly or indirectly entered into any agreement or arrangement with any person or business in an effort to influence any part of this solicitation or operations of a resulting contract; and the Proposer has not taken any action in restraint of free trade or competitiveness in connection with this solicitation. Additionally, if Proposer has worked with a consultant on the Proposal, the consultant (an individual or a company) has not assisted any other entity that has submitted or will submit a proposal for this solicitation.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest exists when a vendor has an unfair competitive advantage or the vendor's objectivity in performing the contract is, or might be, impaired.
5. The contents of the Proposal have not been communicated by the Proposer or its employees or agents to any person not an employee or legally authorized agent of the Proposer and will not be communicated to any such persons prior to Due Date of this solicitation.
6. If awarded a contract, the Proposer will provide to Sourcewell Participating Entities the equipment, products, and services in accordance with the terms, conditions, and scope of a resulting contract.
7. The Proposer possesses, or will possess before delivering any equipment, products, or services, all applicable licenses or certifications necessary to deliver such equipment, products, or services under any resulting contract.
8. The Proposer agrees to deliver equipment, products, and services through valid contracts, purchase orders, or means that are acceptable to Sourcewell Members. Unless otherwise agreed to, the Proposer must provide only new and first-quality products and related services to Sourcewell Members under an awarded Contract.
9. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
10. The Proposer understands that Sourcewell will reject RFP proposals that are marked "confidential" (or "nonpublic," etc.), either substantially or in their entirety. Under Minnesota Statutes Section 13.591, subdivision 4, all proposals are considered nonpublic data until the evaluation is complete and a Contract is awarded. At that point, proposals become public data. Minnesota Statutes Section 13.37 permits only certain narrowly defined data to be considered a "trade secret," and thus nonpublic data under Minnesota's Data Practices Act.
11. Proposer its employees, agents, and subcontractors are not:
 1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
 2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
 3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government or the Canadian government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - D. Abraham Hunter, Executive Vice President, Computer Aid, Inc.

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

Yes No

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

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

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum_16_IT_MSP_Staff_Augmentation_RFP_071321 Mon July 5 2021 12:18 PM	<input checked="" type="checkbox"/>	4
Addendum_15_IT_MSP_Staff_Augmentation_RFP_071321 Fri July 2 2021 10:01 AM	<input checked="" type="checkbox"/>	1
Addendum_14_IT_MSP_Staff_Augmentation_RFP_071321 Tue June 29 2021 06:05 PM	<input checked="" type="checkbox"/>	2
Addendum_13_IT_MSP_Staff_Augmentation_RFP_071321 Mon June 28 2021 05:20 PM	<input checked="" type="checkbox"/>	1
Addendum_12_IT_MSP_Staff_Augmentation_RFP_071321 Fri June 25 2021 03:26 PM	<input checked="" type="checkbox"/>	1
Addendum_11_IT_MSP_Staff_Augmentation_RFP_071321 Thu June 24 2021 04:11 PM	<input checked="" type="checkbox"/>	1
Addendum_10_IT_MSP_Staff_Augmentation_RFP_071321 Tue June 22 2021 04:50 PM	<input checked="" type="checkbox"/>	3
Addendum_9_IT_MSP_Staff_Augmentation_RFP_071321 Fri June 18 2021 05:25 PM	<input checked="" type="checkbox"/>	1
Addendum_8_IT_MSP_Staff_Augmentation_RFP_071321 Thu June 17 2021 06:57 PM	<input checked="" type="checkbox"/>	3
Addendum_7_IT_MSP_Staff_Augmentation_RFP_071321 Wed June 16 2021 06:14 PM	<input checked="" type="checkbox"/>	3
Addendum_6_IT_MSP_Staff_Augmentation_RFP_071321 Mon June 14 2021 09:42 AM	<input checked="" type="checkbox"/>	3
Addendum_5_IT_MSP_Staff_Augmentation_RFP_071321 Fri June 11 2021 09:10 AM	<input checked="" type="checkbox"/>	2
Addendum_4_IT_MSP_Staff_Augmentation_RFP_071321 Wed June 9 2021 04:03 PM	<input checked="" type="checkbox"/>	4
Addendum_3_IT_MSP_Staff_Augmentation_RFP_071321 Mon June 7 2021 04:39 PM	<input checked="" type="checkbox"/>	2
Addendum_2_IT_MSP_Staff_Augmentation_RFP_071321 Thu June 3 2021 05:13 PM	<input checked="" type="checkbox"/>	1
Addendum_1_IT_MSP_Staff_Augmentation_071321 Tue June 1 2021 08:46 AM	<input checked="" type="checkbox"/>	2